UNDERSTANDING EXPERIENCES OF CHINESE VISITORS TO VICTORIA, AUSTRALIA

Betty Weiler and Xin Yu
Technical Reports

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ABSTRACT

The report comprises four parts, beginning with the background to the study, and the literature underpinning its focus and methods. The second part provides a detailed description of the research methods including data sources, sampling, primary data collection methods and instrument development. The third section presents the research findings covering profile of respondents, their temporal and spatial experiences, satisfiers, dissatisfiers, overall satisfaction, other experiences sought and three brief case studies of the experience of particular sites. The report concludes by outlining the study’s contribution to theory and methodology, its implications for the tourism industry and avenues for further research.

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The authors acknowledge the valuable contributions of the Industry Reference Group (IRG) members Helen Blacket from Tourism Victoria; Mei Liu from Experience Tours Australia; Nigel Aldons from Sovereign Hill Museums Association; Owen Coughlan from Southbound Australia; Natalie Noppolo from Tourism Australia. Our IRG provided us with constructive industry input and feedback on the direction of the project, helped with gaining access to visitors and facilitated a smooth data collection process.

The research team acknowledges the support given by Debbie Maugey from Qantas Airway Business Administration, who made our visitor interviews at Melbourne Airport possible and the support by Annita Allman from Tourism Research Unit, Monash University for her administrative support. Our gratitude also goes to many Chinese-speaking tour guides and Chinese visitors who participated in the interviews and surveys.
SUMMARY

Objectives of Study
This study sought to describe the Victorian tourism experience of Chinese visitors, to use the factors elicited from visitor responses to explain satisfaction and dissatisfaction, and to provide insights into visitors’ aspirations and why respondents do or do not seek a particular type of experience. Specifically, the objectives of the study were:

- To describe the Victoria tourism experience of Chinese visitors in terms of time and space, and what visitors think, feel, say and do in response to their experiences;
- To determine the areas and sources of satisfaction and dissatisfaction with the experience and to measure visitors’ overall satisfaction levels, in order to identify which aspects facilitate visitor satisfaction and dissatisfaction;
- To confirm whether visitor aspirations (i.e. types of experiences sought by visitors) identified in previous studies are in fact relevant to this population, and to determine the implications of these for product enhancement; and
- To use these findings to identify options for product development and refinement as well as marketing strategies for Tourism Victoria and the tourism industry, in order to enhance the marketability of the experience, improve quality, reduce dissatisfaction, and sustain or increase levels of satisfaction.

Methodology
A mixed-methods design was utilised which included data collection from multiple sources, enabling both quantitative and in-depth measures of experience to be obtained. Using a combination of observations, interviews with both visitors and guides, and a visitor self-completed questionnaire provided data that were complementary and comprehensive. Altogether, 45 observations were completed, 34 interviews undertaken and 401 questionnaires obtained from visitors. This combination enabled the results to be triangulated and thus enhanced the reliability of the findings.

Key Findings
This study found that visitors’ length of stay in Victoria is very short. Itineraries generally involve too much travel and/or too little depth, resulting in lower levels of satisfaction. Evidence from multiple sources of data confirmed that visitor satisfaction is largely a result of intangible or ‘expressive’ factors, while dissatisfaction is determined mainly by tangible or ‘functional’ factors. The intangible attributes such as quality of the natural environment and beautiful scenery are Victoria’s key strengths and competitive edge. Those who experienced unique attractions, friendly local people and Australian culture and society noted the importance of these to a novel experience, while good service and facilities and good tour guiding services were noted as contributing to a sense of control over the experience.

The results also lend support to some of the findings of previous research on the Chinese market (Tourism Australia 2004) that Chinese tourists want a more flexible itinerary, more contact with locals, and more participation in recreation activities, but provide some basis for us to question previous findings – that visitors want more challenging and adventurous experiences. The open-ended responses of Chinese visitors suggest that they are seeking benefits that are mainly related to the affective dimension of their experience.

Respondents with previous travel experience were more likely to want contact with locals than those with little or no travel experience. Those with a higher level of education tended to want more participation in recreation activities, and younger respondents tended to want a more challenging or adventurous holiday and more contact with locals. Finally, visitors from Shanghai were more likely to want a more challenging or adventurous holiday than were visitors from other regions.

Findings from this study confirm the results from previous studies, that visitors perceive facilities and services to be substandard. This appears to be mainly due to unethical practices such as cutting costs and quality in this market in order to preserve profit margins. The results also reveal that the quality of tour guiding varies widely. Because tour guides play an important role in facilitating Chinese visitors’ experience, the quality of the tour guiding can be an important satisfier as well as a key dissatisfier.

Sovereign Hill, Phillip Island and the Royal Botanic Gardens were selected for the three case studies to draw on multiple sources of data to triangulate the research findings. Provided are detailed case study results in the main body of the report, indicating that Chinese visitors have largely positive experiences but also that there are some areas at each of these sites where the experience could be improved.
Future Action

The results of this study provide several implications for the tourism industry. First, distinguishing between satisfiers and dissatisfiers provides important insights for management and marketing. Factors that contribute to dissatisfaction (dissatisfiers) need to be addressed by tourism managers to reduce the probability of a negative experience, largely through product development and enhancement. The industry needs to give attention to such functional aspects as how the itinerary is managed and the quality and location of accommodation provided to Chinese visitors. Factors that contribute to satisfaction (satisfiers) identified by this research are Victoria’s key strengths and competitive edge, and tourism marketers and managers should be aware of and harness these. For example, in addition to Victoria’s obvious assets of scenery and natural resources, marketers could do more to promote the culture and lifestyle of Australians and the quality of Melbourne’s urban environment as elements of the Victorian tourist experience.

We also suggest that marketers use the responses of visitors when developing advertising material, as the expressive and affective benefits that respondents refer to are clearly aspects that Chinese visitors will identify with. The reasons given for seeking particular experiences may also prove valuable for product enhancement and development.

The preferences of different groups such as respondents with previous travel experience and those without previous travel experience, respondents with different education levels, age groups and place of origin may be helpful in identifying market segments and providing suitable communication messages and products to different consumer groups of the China market. These results may aid in developing new products aimed at (1) experienced/repeat visitors, (2) educated visitors, (3) younger visitors, and (4) the Shanghai market.

Other potential actions relate to the important role of the tour guide in facilitating Chinese visitors’ experiences. Training programs and other quality assurance strategies may be needed for Chinese-speaking tour guides.

Finally, our results suggest that Chinese customers, perhaps more than other markets, are driven by price and tend to consider low price over quality when selecting a tour. Among other things, this creates opportunities for unethical practice in this market. As a result, educating potential visitors becomes strategically important. In addition, policy and regulation is needed particularly for problems that fall outside of the control of the tourism industry.

The results of the three case study sites also point to a number of actions, and these have been included in the main body of the report and provided directly to the operators.
Chapter 1

INTRODUCTION

Background to the Study
Outbound travel by Chinese citizens has grown rapidly in recent years and it is predicted that by 2020 China will generate 100 million outbound travellers and become the fourth largest country of tourist origin in the world (WTO 1998). China is already the sixth largest tourist market for Australia (TA 2004) and the largest potential growth market with an annual growth rate of 16.1% over the next decade. Consequently, it is important for Australia to maximise yield and tap the visitation potential of this fast growing market (TA 2004).

As a result of a steady shift toward an experience economy, enhancing the customer experience is seen as the best way to add value and increase competitiveness of many types of businesses (Pine & Gilmore 1999). Experience, of course, has long been seen as central to the tourism product. Recently, however, tourism researchers and practitioners have expressed a renewed appreciation for understanding the visitor experience, in order to enhance visitor satisfaction and destination sustainability (Vitterso, Vorkinn, Vistad & Vaadland 2000). Satisfactory visitor experiences generate positive word of mouth and increased visitor numbers, which in turn lead to economic and social well-being of local communities by way of increased revenue, employment, economic integration and diversification, regional development, social stability and/or cross-cultural understanding.

An on-site experience can be influenced both by facilities and services provided and by visitors’ emotional states brought to the site. Visitors’ satisfaction with their experiences of destinations and attractions consist of tangible/functional (e.g. facilities) and intangible/expres sive (e.g. feelings and emotions) dimensions. Most research on satisfaction has taken an ‘instrumental’ (functional) perspective (Vitterso et al. 2000). A number of researchers have questioned this approach and called for a closer consideration of the emotional (expressive) aspect of the tourist experience when assessing satisfaction. They have argued that meeting visitors’ expectations with respect to facilities or services is no longer sufficient. Satisfying customers’ affective needs has become increasingly important in the emerging competitive environment (Cameron & Gatewood 2000; Chhetri, Arrowsmith & Jackson 2004; Sirakaya, Petrick & Choi 2004; Duman & Mattila 2005). Moreover, while failing to meet visitors’ expectations with respect to facilities, access, accommodation, itineraries and customer service can certainly lead to dissatisfaction, meeting these kinds of expectations does not necessarily equate with satisfaction. Identifying ‘factors that contribute to satisfaction (=satisfiers) vs. dissatisfaction (=dissatisfiers)’ is a key theoretical and practical outcome of the study.

In the context of the Chinese inbound tourism market, delivering an experience that not only meets expectations (i.e. minimises dissatisfaction) but also meets Chinese visitors’ aspirations (i.e. maximises satisfaction) is strategically important for the Australian tourism industry. As partners in this study, Tourism Victoria and Sovereign Hill Museum Association together with a number of key tour operators wanted to better understand what Chinese visitors actually experience and to determine how satisfaction with the experience can be improved. In addition to meeting this key aim, the study sought to employ and evaluate a number of methods for examining the Chinese visitor experience and the factors that facilitate visitor satisfaction and dissatisfaction with their experience.

Objectives of the Research
- To describe the Victoria tourism experience of Chinese visitors including the temporal and spatial dimensions of their visit, the guided experience, and visitors’ cognitive, affective and behavioural responses to their experiences;
- To determine the areas and sources of satisfaction and dissatisfaction with the experience and to measure visitors’ overall satisfaction levels, in order to identify the elements that facilitate visitor satisfaction and dissatisfaction;
- To confirm whether visitor aspirations (i.e. types of experiences sought by visitors) identified in previous studies are in fact relevant to this population, and to determine the real meaning of these to visitors as a basis for product enhancement; and
- To use these findings to identify options for product development and refinement as well as marketing strategies for Tourism Victoria and the tourism industry, in order to enhance the marketability and the

1 Phillip Island Nature Park was approached but declined to participate in the study.
quality of the experience, reduce or eliminate areas of dissatisfaction, and sustain or increase areas of satisfaction.

Definitions

Visitor experience
Visitor experience is the observable and tangible/functional characteristics of a Chinese tourist’s visit to the state of Victoria, overlaid with the visitor’s individual and subjective responses to the visit. In this study, we describe the group experience delivered by the destination and tour operators, based on its spatial (where they go) and temporal (how long they spend) dimensions and other characteristics of the tour product (group size, mode of travel, presence and role of tour guide). We also describe visitor responses using the things visitors say they think (cognitive) and feel (affective) as a result of their experience – for example, what they say to each other, to the guide and to the researcher during and after a guided commentary and during the visitor interview. Visitors’ behavioural responses are also included, both stated behavioural intentions (e.g. to recommend the destination) and observable behaviours (verbal and nonverbal behaviours observed during a tour experience).

Expectation
An expectation is a component of the experience that is necessary for an experience to not be dissatisfying. They tend to be memorable only if they are unmet or absent. Expectations may include, for example, elements of safety, hygiene, health, comfort, accessibility and affordability. They may also include elements of service provision. In this study, we equate an unmet expectation as a dissatisfier, operationalised in the visitor questionnaire as ‘the things I liked least/found most dissatisfying’. In the interview survey, we asked visitors a range of questions around the general theme of what they expected that wasn’t delivered that they might talk about back home.

Aspiration
An aspiration is a component or characteristic of the experience that is necessary for an experience to be satisfying. It may also be thought of as an experience sought or desired. Visitors may not know or be able to say what these are if they are not part of the experience, but if aspirations are met they tend to be memorable. Aspirations may include, for example, quality customer service, commentary or interpretation in one’s own language, engagement with the destination or interaction with locals. In this study, we equate an aspiration as a satisfier, operationalised in the visitor questionnaire as ‘the things I liked best/found most satisfying’. In the interview survey, we asked visitors a range of questions around the general theme of the dreams or desires that were met on the trip that they might talk about back home.

Global satisfaction
Global satisfaction is the realisation of desired outcomes or benefits (Brown 1988). It is measured in this study by responses to three questions on a 7-point bi-polar scale (overall satisfaction, intention to recommend, and intention to return) as well as a 3-point measure of satisfaction relative to other places visited on this trip.

Literature Underpinning the Study Focus and Methods

Experience
The 1980s was the era of the product or goods economy. Product quality and innovation were the important means of achieving customer satisfaction and thus a competitive advantage. In the shift to a service-based economy in the 1990s, providers launched personalised (customised) service, and service quality replaced product quality. In the 2000s, goods and services have moved from being satisfiers to being dissatisfiers. That is, offering quality products and services is no longer considered to be enough to establish a competitive advantage due to the development of new technology, more demanding consumers and increasing competition (Knutson & Beck 2003). Now we have entered the era of the experience economy.

Experience is an elusive and indistinct notion with multiple dimensions and it has been studied from different perspectives. For examples, Otto & Ritchie (1996) suggest that incorporating an affective component into the service experience in tourism may improve understanding of the richness of the customer experience in service encounters. Others such as Quan & Wang (2004) and Chhetri, Arrowsmith and Jackson (2004) have attempted to identify the dimensions and components of visitor experiences in various settings. Although there are different views of what constitutes an experience, two observations can be made based on a review of previous literature.
First, experiences require involvement or participation by a person. Second, experience is subjective in nature and therefore culture-specific and even individual-specific.

Factors affecting satisfaction and dissatisfaction with an experience

The pioneering work of Herzberg and colleagues (1959) on employee motivation and satisfaction in the workplace found that the motivators (satisfiers) that lead to a positive work experience are quite separate and distinct from the maintenance factors (dissatisfiers) that contribute to a negative experience. In other words, satisfaction and dissatisfaction are not opposite ends of a single continuum, and therefore eliminating dissatisfiers (typically issues to do with functional aspects in the workplace) does not necessarily translate into satisfaction. Herzberg’s two-factor model is generally accepted to make intuitive sense, but has not been widely operationalised or tested. Several relatively recent studies have attempted to apply and extend Herzberg’s thinking to customer research and tourism studies. For example, Kano and his colleagues developed a methodology to measure customer perceptions of product attributes (Berger, Blauth, Boger, Bolster & Burchill 1993). Kano used slightly different language but also focused on distinguishing between dissatisfiers (must be’s) and satisfiers (attractives). However, Kano’s model is mainly used to identify customer requirements for product features rather than service attributes. Berry and Haeckel (2002) note that an organisation needs to recognise anything that the customer perceives or senses or recognises by its absence as important to the experience. These can be grouped into two categories of factors. The first relates to functional factors such as the cleanliness of the hotel rooms. The second category relates to things perceived by the senses (emotional) such as the smile of the front desk staff. This marries closely with Herzberg’s two-factor model of hygiene/maintenance factors and motivator factors. Crompton (2003) suggests that Herzberg’s two factor theory may help to explain levels of visitor satisfaction with an event.

Consistent with Herzberg’s model, tourism researchers have argued that factors that facilitate satisfaction are different to factors that facilitate dissatisfaction, so that reducing or preventing dissatisfaction does not necessarily ensure or enhance visitor satisfaction. For example, Uysal (2003) argues that expressive attributes tend to dominate in satisfaction ratings, while instrumental attributes dominate in dissatisfaction ratings. However, researchers still struggle to find measures that can distinguish between satisfiers and dissatisfiers when assessing visitor satisfaction (Crompton & Love 1995; Johns & Lee-Ross 1997; Uysal 2003; Chan & Baum 2004). Johnston (1995) notes that attributes that satisfy or dissatisfy are by no means constant or universal. Similarly, Fournier and Mick (1999) note the importance of a context-specific approach to the study of satisfaction, and caution against generalising to tourists with different cultural backgrounds.

Building on the logic of Herzberg’s two-factor model, we sought to identify the critical factors that facilitate satisfaction and dissatisfaction in the context of the Chinese visitor experience to Victoria, and to evaluate a range of methods for measuring these.

Methodological issues

Satisfaction is a psychological outcome of an experience, which is more affective or emotional than quality (Tian-Cole & Crompton 2003). Past studies tend to use structured survey methods and depend heavily upon the researchers’ perceptions of attractions rather than on those of visitors, which are not the most appropriate basis for evaluating psychological outcomes. The voice of the consumer determines satisfaction. Thus, satisfaction should be expressed through the consumer’s words and actions (Fournier & Mick 1999; Bowen & Clarke 2002).

The current study adopts a mixed-methods approach guided by a conceptual framework (Herzberg’s two factor theory) to examine what is actually experienced, to identify the satisfiers and dissatisfiers that contribute to visitors’ satisfaction with their experiences, and to explore the meanings of the experiences and how the experience can be improved. Chan and Baum (2004) tried to operationalise Herzberg’s two-factor model by using open-ended questions with visitors to an eco-lodge to capture the visitor’s voice about their experience. We adapted their free-response questions for use in our instruments, particularly for questions 8 and 9 in the visitor questionnaire, while the remainder of the questionnaire was informed by previous satisfaction research together with previous findings on the Chinese outbound travel market. A similar approach was used to develop and implement the visitor interviews.

The Chinese outbound market to Australia

Zhang and Lam (1999) identified five top key factors motivating the Chinese in making travel decisions. These include seeing something different; increasing knowledge about a foreign destination; rest and relaxation; being able to share travel experiences after returning home; and experiencing a different lifestyle/culture.

A study conducted by Tourism Australia (2004) on Chinese Approved Destination Status (ADS) visitors to Australia revealed that ‘Chinese visitors choose to come to Australia because they want to have a chance to experience the natural landscape; good beaches, swimming and water sports; a chance to relax and have a good time; free time to explore; a chance to see the capital cities and main centres; an opportunity to see Australian
wildlife in its natural surroundings; an in-depth experience of the local culture; and to gain an understanding of how Australians live’ (p.3).

The Tourism Australia study (2004) also revealed that ‘Chinese visitors seek experiences that include opportunities to interact with Australian people and culture; high quality guides; freedom to shop in a variety of locations; central accommodation; a relaxed and flexible style of tour; access to Chinese language information; and activities and experiences that are unique to Australia’ (p.5).

However, according to Tourism Australia (2004), ‘Australia is a fantastic destination but Chinese ADS visitors can’t access it; the current tour management being offered is an issue. The destination delivers but the tour programs do not’. King and McVey (2003) argue that this is a result of the nature of the China market which is highly price sensitive, with cost a dominant factor in selecting a destination. Chinese outbound travel to Australia is tightly controlled by Chinese travel agencies and inbound tour operators have thin profit margins, resulting in price competition, cost cutting and poor service quality (Pan & Laws 2004).

### Limitations

This study could not measure cause-and-effect directly, so despite our efforts to assess whether the presence of particular elements or factors contributed to or facilitated satisfaction (or alternatively facilitated dissatisfaction), we cannot conclude that the former caused the latter. For example, we cannot be sure that a particular factor such as the delivery of inspired commentary by a bilingual tour guide actually caused visitors to be satisfied, or that unsanitary public facilities actually caused visitors to be dissatisfied. We can, of course, report what visitors said about the factors or elements that they perceive to have contributed to their satisfaction or dissatisfaction.

As mentioned earlier, this is not a study of service quality nor of visitors’ evaluation of service quality. Nor is it a study of pre-visit expectations or destination choice, although we did include questions on purpose of trip (‘why did you choose to come to Australia?’) which helped to highlight specific needs rather than the actual motivation itself (McIntosh & Goeldner 1990).
Chapter 2

METHODS

Experience is a complex concept with multiple dimensions and very subjective in nature. Prior assumptions cannot reveal the nature and dynamics of visitor experience. Driven by the research objectives, as shown in Table 1, the study demanded that a mixed-methods research design be used, allowing for the collection of multiple sources of data to produce results in depth. Combined methods also enable triangulation of multiple perspectives on the research problems to provide reliable information.

<table>
<thead>
<tr>
<th>Sources of data</th>
<th>Objective 1</th>
<th>Objective 2</th>
<th>Objective 3</th>
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<td>Unobtrusive observation</td>
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<td>Participant observation</td>
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<tr>
<td>Interview (with visitors and tour guides)</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Visitor survey (open ended questions)</td>
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<td>✓</td>
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<tr>
<td>Analysis of data gathered using methods listed above</td>
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<td>✓</td>
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<td>Triangulation of results</td>
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</table>

Given that many recent studies on the Chinese outbound market, including several on visitors to Australia, the research team was able to leverage off of these findings, particularly with respect to travel motives, expectations and aspirations (desires). The study is also informed by concepts both within and outside the tourism literature, notably the work of Herzberg et al. (1959), Pine and Gilmore (1999), Otto and Ritchie (1996) and Crompton (2003) on experience, and the work of Seaton (2002), Bowen and Clarke (2002), Tian-Cole and Crompton (2003) and Chan and Baum (2004) on satisfaction/dissatisfaction discussed in the previous chapter.

Secondary Data Sources

Secondary data have been used in part to address Objective 1 – in particular, tour companies’ product brochures and tour operators’ itineraries have contributed to a clearer picture of the products purchased by and delivered to Chinese visitors on pre-booked tours. Visitor statistics and some survey data collected by Commonwealth and state government departments have also been used to understand the trip characteristics of Chinese visitors, particularly the temporal patterns of their visit.

Sampling and Data Collection

For the visitor survey and visitor interviews, the sample population consisted of Mainland Chinese visitors on pre-booked tours. The total number of Chinese visitor arrivals to Victoria in 2004 was 116,000. The target sample size was set at 400, in order to be able to generalise to the population with 95 per cent confidence level. Groups were identified with the help of IRG members, selected airlines, tour operators and tour guides. Every attempt was made to limit the sampling frame to groups who were on the last leg of their Australian journey (i.e. were flying home direct from Melbourne) so that they could not only provide information on their experience in Victoria but also compare their Victorian experience with their experiences in other parts of Australia. The questionnaire-based survey was administered in hotels and international departure gate lounges at Melbourne airport, using a systematic random sampling process. For example, upon entering the hotel, the researcher approached the first Chinese visitor who was near the entrance. If the person the researcher approached refused to participate in the survey, the researcher went on to the closest available person. The same process was applied when locating the informants for visitor interviews at the airport gate lounges but due to limited time and resources, using a much smaller sample size.
The interviews were conducted mainly in the departure lounges and the sampling was opportunistic. Given the qualitative nature of the interviews and observations, there was no predetermined sample size, and both the interviews and the observations continued until the researchers felt they had reached a level of saturation, where they were getting no new information.

For the guide interview, the sample population consisted of Chinese-speaking tour guides based in Melbourne. It is not possible to identify the population of Chinese-speaking tour guides in Melbourne as there is no official registration (sampling frame) for these guides. The population size is estimated to be between 50 to 100. Snowballing sampling was employed to identify enough respondents to provide a complementary perspective to what tour guides were able to observe and what visitors reported.

Primary Data Collection Methods and Instruments

Data were collected over a period of about six months, using a combination of observations, interviews with both visitors and guides, and a visitor self-completed questionnaire in order to obtain data that were complementary and comprehensive. A table showing research methods, the instruments and sample sizes is provided in Appendix A. All instruments were translated into Chinese and all data collection was conducted in Chinese.

Observations were conducted at key tourism attractions in Victoria to examine the spatial and temporal patterns of Chinese visitors’ behaviour, their responses to and their behaviours at the places visited. An observation-recording sheet (see Appendix B1) was used to record data including the basic information about the group, activities participated in, sites visited at the place and visitors’ verbal and non-verbal behaviours. For example, researchers recorded the questions respondents asked, their photo-taking behaviour, and their interactions with locals. Based on results of previous studies about the pivotal role of the tour guide (Pearce 1984; Weiler & Ham 2001; Ham & Weiler 2002; Yu & Weiler 2004) the research team also observed and recorded the tour guide’s performance such as whether the tour guide provided access to and commentary about the place, responded to questions, facilitated interaction and gave the group options.

Two different modes of observation were used, the observer as participant and the complete observer to gather data. Being an observer as participant allowed us to get a holistic and first-hand look at and feel for the experience. Detailed field notes were kept and later analysed to explore themes relating to the nature of the experience from the perspective of the product being offered by the operator or attraction and the response of the visitors. Where possible, informal conversations with individual visitors were used to probe visitors’ thoughts and feelings about the experience. However, participant-observation is time-consuming and difficult to arrange, so that the number of participant observations was limited to eight at 7 attractions.

These in-depth experiences were supplemented with unobtrusive observations of 37 tour groups at eight different attractions. Because all these observations were in a ‘public’ space and thus did not intrude on the privacy of the participants, permission was obtained to do many more of these. Again, observations of visitor behaviour were supplemented with informal conversations to explore the cognitive and affective processes underlying visitors’ behaviour. In total, then, 37 unobtrusive observations were conducted at eight attractions and 8 participant observations at 7 attractions.

A visitor survey was carried out resulting in a total of 401 completed questionnaires. The self-complete questionnaires (Appendix B2) was informed by previous studies, suggestions from IRG members, and meetings with tour operators and marketing staff at some tourism attractions. An earlier version (in Chinese) was pre-tested during the 2004 Christmas holiday season with five Chinese visitors and four bilingual ethnic Chinese with a tourism research background. A number of closed questions addressed visitors’ satisfaction levels and their socio-demographic and trip characteristics. In addition, using the theoretical lens of Herzberg’s two-factor model, visitors were asked to write free-responses about the best/most satisfactory and worst/least satisfactory things about their visit and the reasons for their responses. This part of the instrument was based on Chan and Baum (2004), and the remainder of the questionnaire was informed by previous satisfaction research together with previous findings on the Chinese outbound travel market. The survey thus obtained both quantitative information (particularly with respect to satisfaction levels and visitor/trip profiles) as well as rich qualitative data, giving insight into the reasons for visitors’ responses, particularly with respect to elements affecting visitors’ satisfaction and dissatisfaction.

Using a set of semi-structured interview questions (Appendix B3) and again influenced by Herzberg et al. and Chan and Baum (2004), 27 interviews with Chinese visitors were conducted at the airport departure gate lounges, to capture the ‘voice’ of the visitor about the types of experiences they were seeking, their best/most satisfactory and worst/least satisfactory things about their visit and how they felt about these. Respondents were asked to think about whether any particular incident or experience they had particularly stood out as being special and, if so, what made this special or memorable for them. Seven interviews were also conducted with tour guides. This permitted comparisons between what guides perceive about what visitors think, feel and do to what visitors say and actually do.
Data Analysis

Descriptive statistics and one-way frequency distributions were produced for responses to the closed questions of the visitor survey. Content analysis was undertaken on the visitors’ free responses to open-ended questions, the transcripts from the visitor and tour guide interviews, and the observation field notes. While this report has attempted a synthesis of the data from these various sources, the research team collected a considerable breadth and depth of information, much of which has been provided to the partner organisations for their further use.

For a number of the open-ended questions in the visitor survey, additional coders were employed and intercoder reliability was checked to increase the reliability of the coding and categories. This includes questions 8, 9, 11, 12, 13, 14, 15, 16 and 17.

In addition, reliability was achieved by using multiple data sources for particular variables such as the spatial and temporal dimensions of the experience, the factors that contribute to satisfaction and dissatisfaction, and the experiences sought (desired) by visitors. Three examples presented in Chapter 3 demonstrated how the study used multiple sources of data to further integrate the research findings to look for convergence (Creswell 1994; Blaikie 2000).

Several steps were taken to increase validity of the findings. First, all data fragments were inspected and compared so that the variation of the issues under investigation could be observed (Perakyla 1997). Second, data were treated comprehensively to achieve integrated and precise results (Mehan 1979). For example, the most satisfactory experiences mentioned by Chinese visitors and tour guides were compared and integrated concepts were identified. Finally, the majority of responses to open-ended questions were tabulated to show strong tendency (Silverman 2000).
Chapter 3

RESULTS

The following discussion of results draws on the data collected from the multiple data sources and methods described in the previous section. Unless otherwise stated, the quantitative results are based on the 401 visitors who completed the self-administered questionnaire.

Profile of Respondents

There were slightly more males (56%) than females who responded to the survey and, as shown in Figure 1, there were very few respondents under 25 and over 55, with 61% between 35 and 54 years of age, a slightly higher percentage of this age group comparing with all Chinese visitors to Australia (52%) (IVS 2004).

![Figure 1: Age distribution of survey respondents (N=401)](image1)

The majority of respondents were from Shanghai (23%), Beijing (20%) or Guangdong (13%), with no more than 6% coming from any other single city or region. This is because Beijing, Shanghai and Guangdong are the original three regions where Australia was granted ADS status. Seventy-one per cent were university-educated, with the remaining respondents almost evenly spread across the categories of high school, vocational school and postgraduate education. As shown in Figure 2, there is quite wide variation in the occupation of respondents, although not surprisingly few were labourers/factory workers.

![Figure 2: Occupation of survey respondents (N=401)](image2)
Two-thirds of respondents described their English language competency as either ‘broken’ or ‘none’. Eighty-three per cent of the 340 respondents who answered the question about previous travel experience had travelled within Asia, 46% had travelled to Europe and 26% had travelled to the US (multiple responses were possible here). Only two respondents mentioned that they had been to Australia before.

Of the 82 respondents on business tours, 77% had a university degree (compared with 71% of the total sample). More than 75% of respondents on business tours were aged between 35 to 54 years old (compared with 47% of respondents on holiday tours), and none were in the age groups of 18-24 and 65+. Over 63% of those on business tours were either government officials or administrators (36% of respondents on holiday tours had similar occupations).

Of the 27 respondents who were interviewed, 70% of them were male and 61% were between 35 and 54 age groups, which is similar to those who we surveyed. Although the 27 informants were from 4 municipalities and 7 provinces, the majority of them were from Guangdong province (30%) and Shanghai (22%). Sixty-seven per cent held a university degree and there was a variation in occupations among respondents but none of them were labourers or factor workers. The level of English language competency of the 27 informants was similar to those we surveyed. Regarding previous travel experience, 92% of them had travelled to Asia, 24% to Europe and 46% to the US (multiple responses).

The Experience

The trip characteristics of the survey respondents are of interest. Most visitors described themselves as being on a holiday (68%) as opposed to a business (20%) or incentive trip (6%). This is because visitors on a business visa tended to be more cautious regarding the survey – for example, groups often selected only one representative to participate in the survey. Visitors on tourist visas were more willing to participate in the survey. Tourists on ADS or other types of tourist visas made up 70% of respondents, with 24% of respondents travelling on a business visa.

However, 48% said they were travelling with business associates, 27% were travelling with friends, and only 25% were travelling with their spouses (18% were travelling with children – again, multiple responses were possible here). The average group (travel party) size on the current trip was 24 with a range of 3 to 53.

On the current trip, 96% of the 366 who responded to this question had visited Sydney, and over 80% had visited the Gold Coast, Brisbane, and Canberra. The average length of their stay in Australia is 7 nights ranging from 2 to 22 nights, which is shorter than that of all Chinese visitors to Australia. In 2005, the average length of stay in Australia by all types of Chinese visitors is projected to be 44 nights, largely due to travel for purposes other than holiday study, and visiting friends and relatives.

With respect to their experience in Victoria, according to the survey data, 44% of respondents spent two nights while 35% spent only one night in the state of Victoria. According to the itineraries we collected, for city sightseeing, itineraries typically include the Royal Botanic Gardens, Fitzroy Gardens, St Patrick Cathedral, Shrine of Remembrance, National Gallery of Victoria and the Arts Centre. In addition, Chinese groups typically visit either Phillip Island, Sovereign Hill or the Great Ocean Road. Based on observation results, the average length of visit at each attraction is 1.5 hours at Sovereign Hill, 1 hour at Phillip Island, one hour and fifteen minutes at Great Ocean Road, 20 minutes at Fitzroy Gardens, 20 minutes at St Patrick’s Cathedral, 20 minutes at the Shrine of Remembrance, 30 minutes at the Royal Botanic Gardens and 20 minutes at the National Gallery of Victoria.

Quotes from the visitor interviews are used here to illustrate the range of time and spatial dimensions of visits by Chinese visitors in Victoria:

Example 1: ‘We arrived at 11 pm in Melbourne on Saturday. On Sunday we did city sightseeing in the morning, and in the afternoon we went to Phillip Island. Today we got up very early to catch the early flight back to China.’

Example 2: ‘We visited St Patrick’s Cathedral, Fitzroy Gardens, Royal Botanic Gardens, the Casino and the South Bank along the Yarra River. We also visited Port Phillip Bay, an orchard and a winery.’

The first example provides a visitor’s perspective on the limited spatial and time dimensions of the experience included in one group’s 30 hour visit to Victoria, with a lot of time spent in just travelling between attractions. The second example illustrates a more considered itinerary which provides more variety but still with very little time in the state, and thus the visitor’s recounting of the ‘experience’ is just a list of ‘been there, done that’.

We supplemented what visitors said in interviews with 40 observations at eight tourism attractions in Victoria as shown in Table 2.

Of particular note from both the interviews and the observations were the inflexible nature of the itineraries and the almost complete absence of free time for visitors, the limited opportunities for visitors to interact with local people, and the lack of opportunities to participate in local recreation activities. These are all ‘aspirations’ from previous research that we discuss further in a later section of these results.
In spite of the intense and inflexible nature of the tourists’ itineraries, some visitors still managed to engage with the destination, as evidenced by the following description provided by one of the interview respondents:

We stayed in Melbourne for two nights and did city sightseeing, went to the seaside, and visited a winery, a very relaxed itinerary. In Melbourne, I feel the air is fresh and the city is very tranquil and elegant with good public security and a good social welfare system. From my observations in the Royal Botanic Gardens, the local people looked very relaxed. We hardly see policemen – to me, this is a symbol of a developed country with high living standards and high quality people – a low crime rate. Australia has very good education and medical systems, including a very people-oriented system such as a helicopter ambulance service for rural people. The local people seem very conscientious and honest. We visited a winery and the wine tasted great!

<table>
<thead>
<tr>
<th>No. of observations</th>
<th>Length of visit</th>
<th>What visitors experienced</th>
<th>How visitors experienced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sovereign Hill (N=4)</td>
<td>1.5 h</td>
<td>Main Street, Underground Gold Mine, Gold Panning Area, Gold Museum</td>
<td>Example: followed tour guide, listened to commentary, took photos, watched a movie, panned for gold, visited a bakery, did shopping at Gold Museum gift shop</td>
</tr>
<tr>
<td>Phillip Island (N=4)</td>
<td>1h</td>
<td>Penguin Parade</td>
<td>Examples: visited visitor information centre; watched penguins return to their nests; &amp; watched documentary film, visited gift shop.</td>
</tr>
<tr>
<td>Great Ocean Road (N=2)</td>
<td>1.25 h</td>
<td>Geelong, Apollo Bay, Twelve Apostles, Loch Ard Gorge</td>
<td>Example: took photos at waterfront Geelong, had lunch at Apollo Bay, visited Twelve Apostles &amp; Loch Ard Gorge &amp; took photos at each site. Several group members went down to the beach at Lorch Ard Gorge.</td>
</tr>
<tr>
<td>Fitzroy Gardens (N=9)</td>
<td>0.3 h</td>
<td>Cook’s Cottage &amp; the conservatory</td>
<td>Example: took photos in front of Cook’s Cottage &amp; inside &amp; outside of the conservatory</td>
</tr>
<tr>
<td>St Patrick's Cathedral (N=4)</td>
<td>0.3 h</td>
<td>Miniature cathedral, the organ, sanctuary, outside Cathedral</td>
<td>Example: followed tour guide, listened to commentary, took photos inside &amp; outside the Cathedral</td>
</tr>
<tr>
<td>Shrine of Remembrance (N=3)</td>
<td>0.3 h</td>
<td>The Sanctuary, the Stone of Remembrance, &amp; the Balcony</td>
<td>Example: listened to the commentary delivered by tour guide, took pictures in front of the Stone of Remembrance &amp; on the balcony.</td>
</tr>
<tr>
<td>Royal Botanic Gardens (N=11)</td>
<td>0.5 h</td>
<td>Lower Yarra River Habitat (black swans &amp; eels), Ornamental Lake &amp; Central Lawn</td>
<td>Example: entered from Gate A, took pictures of black swans, chatted with locals &amp; took photos of Australian kids, took a lakeside stroll along Ornamental Lake or laid down on Central Lawn to enjoy the fresh air &amp; tranquillity of the Garden.</td>
</tr>
<tr>
<td>National Gallery of Victoria (N=3)</td>
<td>0.3 h</td>
<td>Pre-Columbian Antiquities &amp; Egyptian &amp; Near Eastern Antiquities, European Paintings &amp; the gift shop.</td>
<td>Example: walked from one display room to another quickly.</td>
</tr>
</tbody>
</table>

### Satisfiers and Dissatisfiers

Evidence from several different sources confirms that, at least for the population under study, satisfaction is explained largely by intangible/expressive factors, while dissatisfaction is impacted mainly by tangible/functional factors. The visitor self-completed survey and the face-to-face interviews with visitors both included open-ended questions, inviting respondents to list what they liked most and least about their visit to Victoria and the reasons why. These were analysed and categorised, and are shown in Tables 3 and 4 based on frequency of
responses, from most frequent to least frequent (for the self-completed survey). The following paragraphs provide further explanation and examples for each category.

Table 3: Most Satisfactory Things about My Visit to Victoria

<table>
<thead>
<tr>
<th>Satisfiers</th>
<th>Visitor Survey</th>
<th>% of Responses</th>
<th>Visitor Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of natural environment</td>
<td>95</td>
<td>21.7</td>
<td>16</td>
</tr>
<tr>
<td>Quality of specific tourism attractions</td>
<td>84</td>
<td>19.2</td>
<td>6</td>
</tr>
<tr>
<td>Beautiful scenery</td>
<td>72</td>
<td>16.5</td>
<td>9</td>
</tr>
<tr>
<td>Experiencing Australian lifestyle/culture</td>
<td>52</td>
<td>11.9</td>
<td>4</td>
</tr>
<tr>
<td>Quality of built/urban environment</td>
<td>50</td>
<td>11.4</td>
<td>11</td>
</tr>
<tr>
<td>Quality of tourism infrastructure including accomm/food</td>
<td>35</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Quality of tour guiding</td>
<td>25</td>
<td>5.7</td>
<td>11</td>
</tr>
<tr>
<td>Warm/friendly local people</td>
<td>24</td>
<td>5.5</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total responses</strong></td>
<td><strong>437</strong></td>
<td><strong>100</strong></td>
<td></td>
</tr>
</tbody>
</table>

* these are tangible/functional factors under the control of the tourism industry

** this is less tangible but is still under the control of the tourism industry

F = functional/tangible item vs. expressive/intangible item

Note – multiple responses were possible for both the visitor survey and the interviews.

**Quality of the natural environment** includes mention of elements such as fresh air, greenness, the pleasant climate, and feelings of comfort, relaxation and contentment that go along with these attributes. ‘I feel very contented when seeing the blue skies and white clouds here,’ said one respondent.

Responses were coded to quality of specific tourism attractions when mention was made of commercial or public attractions such as Phillip Island (most frequently mentioned), the Great Ocean Road, Sovereign Hill Historic Site, the Royal Botanic Gardens and Fitzroy Gardens. Sometimes a specific aspect of the experience is mentioned, for example, ‘Watching the little penguins arrive back at their nesting sites at Phillip Island is a very unique experience.’

**Beautiful scenery**, although closely related to the quality of the natural environment, was coded separately, as there were numerous specific mentions of the scenery and its positive impact on the experience. For example, one respondent said, ‘There is beautiful scenery everywhere throughout our trip. It is better than I expected.’

Visitors also frequently mentioned that they liked **experiencing Australian lifestyle**. This included the opportunity to learn about Australian culture and society, to gain insight into Australians’ love of and respect for nature, and to experience their love of sport. ‘People have a strong sense of environmental protection’ was a very common response here.

It was unexpected to find that **quality of the built/urban environment** was very frequently mentioned as one of the most-liked things about the experience. Respondents commented on Melbourne’s beautiful parks and gardens, the quality of the landscaping throughout the city, the architecture, cleanliness, and good public security. As expressed by one respondent, what made it satisfying was the ‘combination of gardens, historical and modern buildings’.

The **quality of the tourism infrastructure** (including the airport, hotels, restaurants and transportation and the capabilities of the staff) and the **quality of the tour guiding** (‘their broad knowledge of Australia and Victoria, skilful commentary, group management and problem-solving skills, and caring and professional approach’) were mentioned frequently enough to be included as separate categories.

Finally, the **warm, friendly people** was frequently mentioned and therefore coded as a separate category. ‘Warm, welcoming, law-abiding, honest, unsophisticated, and friendly’ were all adjectives used to describe the locals.
As shown in Table 4, nine categories of dissatisfiers emerged. At the top of the list is tour/itinerary management, which parallels some of the problems observed and touched on in the previous section. It is also noteworthy that some elements mentioned as satisfactory for some respondents contributed to dissatisfaction in others, including the following: poor quality or poor location of accommodation; poor quality food/service; poor quality of some public facilities (this included noise, traffic congestion, urban pollution, unhygienic toilets and flies); lack of quality of particular tourism attractions; poor quality product or service in some parts of the transportation infrastructure, (mainly the airport, customs, and duty free shops), and poor quality tour guiding (including some unethical practices). Again, the same categories emerged from the visitor interviews with a slightly different rank order.

Examining the data through Herzberg’s two-factor model, it is evident that the tangible/functional elements (i.e. facilities and tourism product) are mentioned far less frequently as satisfiers (27% of responses refer to functional elements) than as dissatisfiers (86% of responses refer to functional elements). This is also very evident in the interview responses. Moreover, a number of functional factors contributing to dissatisfaction were not evident in the responses regarding satisfaction, for example: limited hours of operation (especially for shops) was mentioned frequently; poor quality of the tour and/or the itinerary (this was at the top of the list of dissatisfiers, and included many specific references to inappropriate schedules, lack of options, and lack of evening activities); the various quality, pricing and ethical issues surrounding duty free shops; and the lack of information in Chinese language (signs, TV programs, written and oral presentations at attractions).

It is noticeable that factors identified as satisfiers in both the visitor survey and the interview results are largely intangible/expressive elements (73% of responses in the visitor survey). Further support for this notion was found when analysing the reasons visitors gave for the things they liked best, with frequent mention of intangible and affective notions such as ‘it made me feel relaxed’, ‘I felt more in control’ and ‘it helped make it enjoyable’. The factors that visitors identify as ‘dissatisfiers’ are nearly all tangible or functional characteristics – only service quality and the quality of the tour guiding fall into the category of intangible. Further examination of the reasons visitors gave reveals that much of the dissatisfaction stems from facilities and services that are perceived to be substandard.

The ‘Fs’ in Tables 3 and 4 denote categories that are associated with tangible/functional factors, revealing that the factors that visitors identify as ‘satisfiers’ are largely intangibles. We found further support for this notion when analysing the reasons visitors gave for the things they liked best, with frequent mention of intangible/expressive notions such as ‘it made me feel relaxed’, ‘I felt more in control’ and ‘it helped make it enjoyable’. It should also be noted that most of the satisfiers identified in the visitor interviews and survey are outside of the control of the tourism industry, although operators and marketers can and do use these factors to develop, enhance and market their products.

The factors that visitors identify as ‘dissatisfiers’ are nearly all tangible or functional characteristics – only service quality (including that of tour guides) can be considered an intangible/expressive factor. All but one
(urban/public facilities) are part of the tourism industry and/or are under some influence by tourism operators or government bodies.

Further examination of the reasons visitors gave reveals that much of the dissatisfaction stems from facilities and services that are perceived to be substandard. Our knowledge of the industry and previous research suggests that this is largely driven by intense price competition in this market. We undertook further analysis of the data and found that more than half of the dissatisfiers are price-related. Here are some insights from our interviews with tour guides into how the current tour is packaged and priced:

‘Currently the China travel market is controlled by a business chain. It is about cost. Many things have to follow the cost. The cost from the very beginning of the tour could impact the whole tour experience’ (No.2 guide interview).

‘The standard prices should be $12 for lunch and $13.5 for dinner. Now some restaurants are paid $8 for lunch and $11 for dinner. You can imagine what Chinese visitors could be offered at such low prices’ (No.5 guide interview).

‘Chinese consumers always look for the cheaper prices when making purchasing decisions, not really paying attention to quality. There might be three reasons for this consumption behaviour: the living standard, the knowledge of quality tourism product and travel motivation. First, many Chinese people lived in poverty for many years. Some have become wealthy in recent years, but past experiences always remind them to save hard in case of uncertainty in their life. That’s partly why a cheaper price is always attractive to Chinese consumers. Second, many Chinese visitors neither know much about their tourism destinations nor the quality of specific tourism products. When making purchasing decisions, Chinese consumers tend to compare prices and number of places being visited and have the view that the greater the number of places visited and the cheaper prices offered, the better the value-for-money of the tour. Third, a certain number of Chinese visitors choose to travel overseas just for having a ‘I have been there’ superficial experience, and as long as they have travelled to the number of places offered, they are [not dis]satisfied. This unhealthy consumer psychology provides opportunity for unethical practice’ (No.6 guide interview).

While some operators and guides may believe that delivering low-priced, multi-site, superficial tours delivers satisfying experience, our data suggest that these do not satisfy but only just reduce the likelihood or degree of dissatisfaction. Thus, the research findings from this study support what Tourism Australia (2004) reported that ‘the current tour design and tour programs are not providing visitors with the opportunity to experience Australia to their satisfaction. ‘Australia is a fantastic destination…but Chinese visitors can’t access it; tour management is the issue. The destination delivers but the tour programs do not’.

### Satisfaction Compared with Other Experiences in Australia

Visitors were asked how satisfied they were with their Victorian experience compared with their experiences in other parts of Australia. Half (50%) of the respondents indicated that overall they were as satisfied with their experience in the state of Victoria as they were with their experiences elsewhere in Australia; a third (33%) said they were more satisfied, and just sixteen percent said they were less satisfied (see Table 5).

<table>
<thead>
<tr>
<th>Level of Satisfaction</th>
<th>Frequency</th>
<th>% of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Much less satisfying</td>
<td>60</td>
<td>16.3</td>
</tr>
<tr>
<td>The same</td>
<td>186</td>
<td>50.4</td>
</tr>
<tr>
<td>Much more satisfying</td>
<td>123</td>
<td>33.3</td>
</tr>
<tr>
<td>Total</td>
<td>369</td>
<td>100</td>
</tr>
<tr>
<td>No response</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>401</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

When asked what they meant by their response to this question, 188 responses were given, which were coded and categorised with respect to whether they were associated with tangible/functional factors (e.g. bad food, poor accommodation, rushed itinerary), intangible/expressive factors (e.g. beautiful scenery, quality urban environment, good weather), or neither (e.g. each place is different, not enough time to compare, depends on individual taste).
Table 6: Reasons Given for Satisfaction Level Compared to Other Places Visited in Australia

<table>
<thead>
<tr>
<th>Reasons</th>
<th>Tangible/functional factors</th>
<th>Intangible/expressive factors</th>
<th>Other reasons</th>
<th>Total number of comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less satisfying compared to other places in Australia</td>
<td>31</td>
<td>16</td>
<td>0</td>
<td>47</td>
</tr>
<tr>
<td></td>
<td>66%</td>
<td>34%</td>
<td>(-)</td>
<td>100%</td>
</tr>
<tr>
<td>The same (equally as satisfying as other places)</td>
<td>25</td>
<td>15</td>
<td>23</td>
<td>63</td>
</tr>
<tr>
<td></td>
<td>40%</td>
<td>24%</td>
<td>36%</td>
<td>100%</td>
</tr>
<tr>
<td>More satisfying compared to other places in Australia</td>
<td>28</td>
<td>43</td>
<td>7</td>
<td>78</td>
</tr>
<tr>
<td></td>
<td>36%</td>
<td>55%</td>
<td>9%</td>
<td>100%</td>
</tr>
<tr>
<td>Totals</td>
<td>76</td>
<td>84</td>
<td>30</td>
<td>N=188</td>
</tr>
<tr>
<td></td>
<td>40%</td>
<td>44%</td>
<td>16%</td>
<td>100%</td>
</tr>
</tbody>
</table>

As shown in Table 6, visitors cited tangible/functional factors about as frequently as they cited intangible/expressive factors (76 vs. 84 comments), but for those who were ‘less satisfied’ with their Victorian experience compared to other states, two-thirds (66%) cited tangible/functional factors as their reason(s) for being less satisfied. All but three of these were factors associated with the tourism industry itself. For example, respondents said:

‘The tour itinerary is not rationale. We wasted a lot of time.’
‘Attractions are too far apart.’
‘Accommodation is too far from the city centre.’
‘Tour coach is too small.’
‘Tourism resources are not well developed.’

These are factors that need to be addressed to reduce levels of dissatisfaction.

Those who were more satisfied with their Victorian experience tended to cite intangible/expressive factors (55% compared to 36% who cited tangible/functional factors). For example, respondents said:

‘Good place for living, the size of the city is good, not much traffic in downtown area. Not crowded during dining and shopping.’
‘Buildings are beautiful and everywhere looks quiet and relaxed.’
‘I had more interactions such as with people in pubs and more chance to chat there. People are very polite, warm and welcoming.’
‘We learned more about local people’s lives.’
‘The tour arrangement is more relaxed, and the tour guide has a strong sense of humanity. She worked very hard to provide detailed commentary.’

While many of these are not under the control of the tourism industry, they are potentially useful for marketing purposes.

These differences are shown graphically in Figure 3, clearly illustrating that tangible/functional factors dominate as reasons for being less satisfied, while intangible/expressive reasons dominate as reasons for being more satisfied. This is consistent with the findings from other parts of both the survey and the visitor interviews: tangible/functional factors tend to be associated with dissatisfaction, while intangible/expressive factors tend to be associated with satisfaction.
Findings from interviews are consistent with those from visitor surveys, that is, intangible factors are more related to satisfiers while tangible factors likely contribute to dissatisfiers. For example, one visitor said during an interview, ‘what I like best about Victoria is its pleasant climate and beautiful scenery. I was disappointed with the number of penguins we saw in Phillip Island. I am not satisfied with shopping. My overall experience in Australia is satisfactory although I am unhappy about shopping’.

Overall Satisfaction

Overall satisfaction was only measured in the self-completed surveys; the visitor interviews did not ask respondents to rate their overall satisfaction with their experience. As with most visitor surveys, respondents to the self-completed survey reported being largely satisfied with their experience (see Figure 4). They are also likely to recommend Australia as a destination to other visitors (see Figure 5). As might be expected, however, there was more variation in reported levels of intention to return to Australia (see Figure 6). Reasons for these responses are explored using the responses to open-ended questions regarding each of these questions.
Respondents were invited to provide free responses to each of these questions, explaining what they meant by their response. 184 respondents gave a comment or explanation regarding their overall satisfaction; 175 respondents commented on their intention to recommend; and 193 commented on their intention to return.

An analysis of the reasons given for lower levels of overall satisfaction compared to higher levels of satisfaction revealed a similar pattern to the responses regarding Victoria as a ‘less satisfying’ vs. ‘more satisfying’ destination. Those who were dissatisfied or very dissatisfied were far more likely to cite tangible/functional factors (71% of the comments by dissatisfied respondents were specifically related to perceived problems with the tourism product or standard of service provided by the tourism industry). Those who were satisfied, very satisfied or extremely satisfied rarely cited tangible/functional factors – only 9% cited product- or industry-related factors that made for a satisfying experience, while 138 of the comments (91%) were related to intangible/expressive factors (e.g. scenery, friendly people, fresh air, climate).

Most (90%) of the comments relating to intention to recommend were by respondents who were neutral or positive about recommending Australia as a tourist destination, and virtually all of them were related to intangible/expressive factors such as the scenery and natural environment.

Perhaps not surprisingly, many of the comments about why visitors do not intend to return have little to do with the experience itself, and more to do with their capacity to return (money, time, and their age were the main reasons given). Of those that gave experience-related reasons, none were tourism industry related.

Variations in Satisfaction

Although this study did not set out to support or refute hypotheses regarding satisfaction and tourist or trip variables that might be associated with satisfaction, we decided to undertake post hoc analyses with respect to particular variables, to explore whether satisfaction levels varied based on visitor or trip characteristics. The three measures of satisfaction we examined, each measured with a 7-point bipolar scale item, were:

- Overall satisfaction with this visit to Australia
- Likelihood of recommending a visit to Australia to friends/relatives
- Likelihood of coming back to Australia for a repeat visit in the future
We found no statistically significant differences with respect to most socio-demographic variables. Mean levels of satisfaction did not differ based on the respondent’s gender, age, education level, occupation, previous travel experience, or command of English. In addition, trip characteristics revealed no significant differences based on type of tour (holiday, business or incentive), type of visa (ADS, tourist, business, other), group size and length of stay.

However, there were significant differences based on region of origin, with visitors from Beijing (n=71) significantly more satisfied than visitors from Guangdong (n=51), and visitors from Beijing significantly more likely to recommend a trip to Australia than visitors from both Shanghai (n=89) and Guangdong (p<0.05). Controlling for type of tour and previous travel experience did not change this result, so it is unclear why the relationship between place of origin and level of satisfaction would be statistically significant. There was also a significant difference between those who were dissatisfied with tour management (Mean=4.96) and those who did not make a comment (Mean=5.33). The latter had a higher level of satisfaction (p<0.26).

Experiences Sought

With regard to the experiences visitors are seeking, we first examined whether the findings of previous research could be confirmed: that Chinese tourists want a more challenging / adventurous holiday, a more flexible itinerary, more contact with locals, and more participation in recreation activities. Second, we probed deeper into the meanings of these previous findings, by asking visitors the reasons why they would or would not want these types of experiences.

Ideally, one would measure such aspirations (along with visitors’ expectations) prior to travel, but we were unable to do this. Instead, we took advantage of the end-of-travel stage of the respondents to ask them to reflect on the experience they had had and where it perhaps fell short.

The quantitative results in this section are based on responses from the self-completed visitor survey, and, where we were successful in probing the underlying reasons for particular responses in the visitor interviews, these are noted. As shown in Figure 7, most respondents did express a desire for a more flexible itinerary (93.4 %), more contact with locals (88.3%), and more participation in recreation activities (77.8%), but the results were less conclusive regarding wanting a more challenging or adventurous holiday, with only 49% responding ‘yes’ to this question.

An analysis of the open-ended responses to the reasons for wanting a more flexible itinerary found that most responses fell into the following categories:

- To have more independence and a sense of freedom
- To meet my individual needs better; to have a more personalised experience
- To be able to see more and have more in-depth experiences
- To make better use of time

(98 out of 124 responses)

Responses from two visitors are illustrative: ‘There are too many restrictions. I do not want my whole holiday controlled by a tour guide’ and ‘Package tours are very tiring and only provide a superficial ‘been there’ experience, no deep impressions’.

Regarding more contact with locals, the reasons given corresponded with the following:

- To learn more about local lifestyles and to experience some of it
- To gain an in-depth understanding about culture and values
Two typical reasons given for wanting more contact with locals were: ‘I want to learn what the local people do, to interact with them and make friends with them, have a party and drink wine, or drink tea and coffee with a local family in their home’ and ‘I want to learn more about what local people think, what they desire, what their values and psychological qualities are.’ The visitor interviews supported and provided additional insight into what visitors want – for example, respondents mentioned visiting a farm, home visits, and chatting with local in pubs.

Reasons for wanting to participate in more recreation activities were:

- To enrich my travel experience and have more fun
- To experience and learn about what locals do for recreation

(87 out of 93 responses)

One respondent said, ‘I want to see more and play more’ and another said ‘My dream was to visit a casino, sing and dance with local people, hear a concert or opera and see a western movie but my dream was not fulfilled.’ The interview results mention similar activities as well as watching sports competitions and participating in local festivals and events.

The main reason given for not wanting more contact with locals (and this was also frequently mentioned as a reason for not wanting to participate in more recreation activities) was language barriers.

As mentioned above, respondents were divided as to whether or not they wanted a more challenging and adventurous holiday. Of the 61 respondents who gave reasons for wanting a more challenging and adventurous holiday, most expressed a desire for novelty. Of the 66 respondents who gave reasons for not wanting a more challenging and adventurous holiday, typical responses were: ‘I want to experience something novel and different, but not adventurous’ and ‘Safety and relaxation are priorities for me.’

It is clear from respondents’ comments that they see challenge and adventure as two very different things. Many seek a challenge (in the sense of wanting to try something new, more independence, more in-depth experiences, and more opportunity to interact first-hand with locals) but do not seek adventure (in the sense of risking their personal safety or having a highly stressful experience). Respondents in the interviews gave a number of examples of specific experiences they would like to have, including surfing, a hot air balloon ride, and a self-drive holiday.

There were no significant differences between respondents on holiday vs. business visas with respect to desire for a more flexible itinerary, more contact with locals, participation in more recreation activities and a challenging or adventurous holiday.

However, as shown in Table 7, there was significant difference between respondents with previous travel experience vs. without previous travel experience with respect to desire for more contact with locals. Respondents with previous travel experience would like to have more contact with locals. We also found a relatively strong linear relationship between education level and desire for having more participation in recreation activities, that is, the higher the education, the stronger the desire for having more participation in recreation activities which is supported by the recreation literature. There is an inverse relationship between age and the desire for a more challenging or adventurous holiday and for more contact with locals. The older the respondent, the less the desire for a more challenging or adventurous holiday, and for more contact with locals. In other words, the younger Chinese visitors are more likely to be interested in challenging holidays and in contact with locals than their elder counterparts.

Another variable that was significant was place of origin – visitors from Shanghai were more likely to want a more challenging or adventurous holiday than were visitors from other regions.

<table>
<thead>
<tr>
<th>Respondents</th>
<th>Experience sought</th>
</tr>
</thead>
<tbody>
<tr>
<td>With previous travel experience</td>
<td>More contact with locals</td>
</tr>
<tr>
<td>With higher level of education</td>
<td>More participation in recreation activities</td>
</tr>
<tr>
<td>Younger of age</td>
<td>More challenging or adventurous holiday &amp; more contact with locals</td>
</tr>
<tr>
<td>Places of origin (Shanghai)</td>
<td>More challenging or adventurous holiday</td>
</tr>
</tbody>
</table>

**Case Studies**

Sovereign Hill, Phillip Island and Royal Botanic Gardens were selected by the research team as three case studies where we could draw on multiple sources of data to triangulate the research findings. Each is presented in a text box labelled Case Study A, B, and C respectively.
Research results from participant observation with visitors at Sovereign Hill revealed that Chinese visitors’ overall experience with their visit to Sovereign Hill is satisfactory. This is supported by the findings from the visitor survey and interviews with Chinese visitors and tour guides. Results from multiple sources of data also suggest that the time Chinese visitors spent at Sovereign Hill was not long enough.

According to the findings from the Chinese visitor survey, respondents’ feedback on their experience with Phillip Island varies widely. Some felt very satisfied while others were disappointed. Most of the complaints relate to the fewer-than-expected number of penguins respondents could see. This is consistent with what Chinese visitors said at the interviews and what the researcher observed. However, findings from the tour guide interviews about the Chinese visitor experience revealed negative perceptions about other aspects of the experience as well.

Multiple sources of data also led to convergence of results regarding the Chinese visitor experience at the Royal Botanic Gardens, showing that Chinese visitors love the plants and animals in the garden. They were particularly satisfied when they were able to interact with the locals and observe their life styles. For more details of the three case studies, please refer to the following three tables 8, 9 and 10.

Table 8: Case Study A – The Visitor Experience at Sovereign Hill

<table>
<thead>
<tr>
<th>Sources of data</th>
<th>Research Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observation</td>
<td></td>
</tr>
<tr>
<td>Date: 19/02/05</td>
<td></td>
</tr>
<tr>
<td>Arrival time: 11 am</td>
<td></td>
</tr>
<tr>
<td>Departure time: 1 pm</td>
<td></td>
</tr>
<tr>
<td>Group size: 29</td>
<td></td>
</tr>
<tr>
<td>Visited Main Street, Underground Mine &amp; Gold Museum; Gold Panning area. The group stopped in front of several buildings at Main Street such as Bakery House and Post Office. Tour guide encouraged the group to interact with the place such as send a postcard back home from the Post Office.</td>
<td>Escort by a Chinese-speaking tour guide who provided directions to &amp; commentary of each site, spent 45 minutes at both Main Street &amp; Underground Mine, 35 Minutes at Gold Panning Area, 40 minutes at Gold Museum. Visitors listened to tour guide’s commentary attentively (based on observations of their body language such as their eye contact, the circle they formed around the guide, the way they followed the direction given by the guide), looked excited when they found gold in the pan, took photos at Main Street, Gold Panning area &amp; Gold Museum.</td>
</tr>
<tr>
<td>Visitor Survey (examples) No. 210, No.344</td>
<td>‘Visit to Sovereign Hill is most satisfactory’ (No.344).</td>
</tr>
<tr>
<td>Visitor Interviews 29/04/05 No.22/No.26 At airport gate lounges</td>
<td>‘The Gold Mine theme park reflects the life of miners in the past. The guiding service provided by a Chinese girl is good. The movie we saw in the underground mine is very good. The hour we spent at Sovereign Hill was too short compared to the time we spent on the road’ (No.22) ‘The thing I liked best about Victoria is Sovereign Hill. It provided us the information on the history of the gold rush. We did not have enough time at Sovereign Hill’ (No.26).</td>
</tr>
</tbody>
</table>
| Tour Guide Interviews  
No.2/No.3/No.4/No.6 | Sovereign Hill is a place with great potential. It also provides good service such as Chinese-speaking tour guides. The Gold Museum is a good place where Chinese visitors can gain more knowledge about the history of Australia and Melbourne. 

Sovereign Hill is a good attraction. Visitors can pan for gold. But tour groups often stay there for only an hour. They would like to take photos but they did not have time. Generally speaking, visitors like Sovereign Hill. 

Visitor feedback on Sovereign Hill is not bad. It has Chinese-speaking tour guides providing commentary to each site. The attraction is well maintained. The only thing is that because they increased the admission fee several times, is has become very expensive. 

Sovereign Hill charges higher admission fees and is also quite a distance from downtown Melbourne. Chinese visitors are not interested in the past. Only those who are interested in history and culture and with higher education levels are interested in Sovereign Hill. |

| Insights from the research findings | Chinese visitors’ overall experience with their visit to Sovereign Hill is satisfactory. This is evident by informal conversations with visitors at Sovereign Hill as soon as they finished their visit, and responses to both the visitor survey and interview conducted at the airport lounges. 

The time spent at Sovereign Hill was not long enough. There is a need to extend Chinese visitors’ duration of stay at Sovereign Hill for at least another hour. 

Many Chinese visitors did not know about Sovereign Hill before coming to Australia. Therefore, their expectation of the place was very vague. 

The time enroute is seen as too long and wasteful. 

Strategies are needed to either reduce admission charged or improve the perceived value-for-money of the experience. |

| Product Enhancement & Marketing Strategies | Use some direct quotes of visitors’ satisfactory experiences as communication messages to potential Chinese visitors to promote Sovereign Hill in Chinese tourism regions or cities to a broader extent to make more potential Chinese travellers aware of this tourism attraction in Victoria. 

The trip on the coach to Sovereign Hill should be part of the experience. Tour guides provide information about Sovereign Hill on the bus such as utilise a video or a booklet in Chinese language to familiarise Chinese visitors with Sovereign Hill and to shape their expectations of the place. Interpretation of Sovereign Hill should start from the commencement of the trip to the place. 

Work together with tour operators and tour guides to make sure Chinese visitors spend enough time at Sovereign Hill. 

Tour operators should encourage tour guides to show Chinese visitors a few more places on the way to Sovereign Hill such as visit a winery or stroll along Lake Wendouree to make the day tour more interesting. 

Organise regular study tours for inbound tour operators and Chinese-speaking tour guides to make them aware of products available at Sovereign Hill and make them understand the value of this attraction. 

Use hedonic pricing theory to identify the product attributes that Chinese visitors are willing to pay and promote those product attributes in the China market, for example, Sovereign Hill provides Chinese-speaking tour guides’ service and flyers in Chinese languages which is a value added service feature of this attraction. Sovereign Hill is also a good place for Chinese visitors to interact with the locals. |
Table 9: Case Study B – The Visitor Experience at Phillip Island

<table>
<thead>
<tr>
<th>Sources of data</th>
<th>Research Findings</th>
<th>Comments made to the researcher about the visit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Observation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date: Arrival time: 8:45 pm</td>
<td>Watched penguins return to their nests, watched documentary film, visited visitor information centre including gift shop.</td>
<td></td>
</tr>
<tr>
<td>Departure time: 9:45 pm</td>
<td>The group sat on the viewing stand to wait &amp; watch penguins returning from the ocean. Some visitors kept count of the number of penguins they saw. Several group members followed penguins along the elevated boardwalks to their burrows. Two female visitors talked to penguins when they had a closer encounter with the penguins. The group members were very joyful when spotting penguins. It was a very windy evening. A couple was afraid of getting cold and returned to the visitor centre earlier.</td>
<td>One group member said that penguins are lovely but the weather was bad. Several group members wondered why they were not allowed to take photos and why they only saw a few penguins. One visitor asked how fast penguins travel in the sea and how far they go. An old man said that communication is the main problem. They need better communication.</td>
</tr>
<tr>
<td>Group size: 28</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Visitor Survey</strong> (examples) No. 60, No.76, No.121 &amp; No.226</td>
<td>‘Penguins are well protected. It is very touching. It seems that penguins have souls. Parents go fishing and their children stay at home to wait for their parents coming homes. Penguins have a very strong sense of teamwork. They are very hard-working. Viewing penguins is a very pleasant experience. It is beyond my expectation’ (No.76). ‘The Penguin Parade provides a novel experience’ (No.121). ‘It is a bit disappointing that we could not take photos of penguins. It is very windy. Three of my friends got cold after visiting Phillip Island’ (No.60). ‘Too much time on the bus, few penguins’ (No.226).</td>
<td></td>
</tr>
<tr>
<td><strong>Visitor Interviews</strong> (examples) No.728/03/05 No. 2406/05/05 At airport gate lounges</td>
<td>‘We felt so delighted when seeing hundreds of penguins returning to the seashore in teams with a team leader walking in front of the team. This is the brand product of Victoria’ (No.24). ‘Our stay at Phillip Island was too short. It is a pity that we did not have time to see the documentary film about penguins. We arrived at Phillip Island late because we wasted time on bargaining in duty free shops. We saw only 20 penguins at Phillip Island’ (No.7).</td>
<td></td>
</tr>
<tr>
<td><strong>Tour Guide Interviews</strong> No.3, No.7 &amp; No.8</td>
<td>‘During Chinese New Year, many groups went to Phillip Island to see the penguins. It is a 2-hour drive. Visitors felt very tired. When they got there, they could only see a few penguins. I know the situation and how visitors might react. On the way there, I had to tell visitors what they should expect. If tour guides do not do this, the gap between what visitors expects and what they experience would be very big’. ‘If the group tour only stays in Melbourne for one night, going to Phillip Island is not a good option, considering safe driving. When going to Phillip Island, coach drivers or driver guides finish the day very late almost early the next morning. If they need to see the group off at the airport early in the morning, drivers only get a few hours of sleep. This is not good in terms of safe driving’ (No.7). ‘About 50% of my clients feel quite neutral about their experience with Phillip Island, only about 10-20% of them feel satisfied due to the limited number of penguins they could see’ (No.8).</td>
<td></td>
</tr>
<tr>
<td><strong>Insights from the research findings</strong></td>
<td>The Chinese visitors’ experience with Phillip Island is variable. Some felt very satisfied while others gave negative feedback. The number of penguins Chinese visitors could see during their visit seems to have a direct impact on their experience. Most of the complaints are related to the unexpected fewer number of penguins respondents could see. Tour guides play an important role in shaping realistic expectations of their clients. Their knowledge of penguins and penguin conservation can help improve Chinese visitors’ experience. They are also important in adding value on the long drive.</td>
<td></td>
</tr>
</tbody>
</table>
### Form a closer working relationship with tour operators & tour guides such as organise regular study tours, provide updated information in Chinese on penguins at Phillip Island or offer training on interpretive guiding to Chinese speaking tour guides; Facilitate better communication between Phillip Island Nature Park and Chinese visitors such as use Chinese-speaking rangers, on-site Chinese-speaking tour guides or more visitor information flyers in Chinese language; Encourage Chinese visitors to watch penguin displays & the documentary film at the visitor information centre; Inform Chinese visitors about the options such as paying extra fees for getting access to the best spots for viewing penguins.

### Table 10: Case Study C – The Visitor Experience at the Royal Botanic Gardens

<table>
<thead>
<tr>
<th>Sources of data</th>
<th>Research Findings</th>
<th>Comments made to the researcher about the visit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Observation</strong></td>
<td><strong>What was experienced</strong></td>
<td><strong>How it was experienced</strong></td>
</tr>
<tr>
<td>Date: 02/01/05</td>
<td>Visited Lower Yarra River Habitat (black swans &amp; eels), Ornamental Lake &amp; Central Lawn</td>
<td>The group entered from Gate A and stopped in front of the tea room. The tour guide gave them 10 minutes to use the restrooms &amp; take pictures in front of the lake, and told the visitors that they need to seek permission from the locals if they want to take photos with them, particularly they need to get permission from parents if they want to take photos with children. Some group members interacted with the locals and took pictures with two little girls with the permission from their mum. The girls’ mum told the Chinese visitors her younger daughter is one year old and the elder one is 2.5 years old. Some group members understood English and responded. One female visitor told other members that she also has a one-year old daughter. The tour guide took the opportunity to tell the group about Australian families &amp; welfare system. Then, the tour guide showed the group their way to the Central Lawn and suggested the group lie down on the lawn to enjoy the fresh air &amp; tranquillity of the Garden for 10 minutes. The group members either sat or lay on the grass. Finally, they took a lakeside stroll &amp; left the garden from Gate A.</td>
</tr>
</tbody>
</table>

| Visitor Survey | “The Royal Botanic Gardens have a variety of plants and are very unique. We strolled along the lake and took photos of black swans” (No.216). |
| Visitor Interviews 22/03/05 No. 2/No. 4 At airport gate lounges | “There are different types of plants, beautiful swans, and comfortable soft lawns in Royal Botanic Gardens” (No.227). |
| ‘High quality people, very conscientious and obedient to law. People look very relaxed. We saw people sleeping on the grass in Royal Botanic Gardens’ (No.2). | ‘The forest park is very beautiful such as Royal Botanic Gardens’ (No.4). |
| Tour Guide Interviews | ‘Attractions in Melbourne such as the Royal Botanic Gardens or Werribee Mansion should be promoted to Chinese visitors instead of going to Phillip Island. Visitors feel very exhausted going to see the penguins. They often only stay in Melbourne for one or two nights. As soon as they checked in at their hotels, they were put on the tour coaches to Phillip Island. When they were on the coach, they fell asleep. Very often Chinese visitors complain that they were in Melbourne, and learned from their tour guides about how good the city is but did not see and feel Melbourne’s rich cultural details and insights instead spending a lot of time on the road, just wasting time’ (No.2). ‘Recently an Australian couple lodged a complaint to the Royal Botanic Gardens about Chinese visitors taking photos with their children without getting the parents’ consent. Tour guides play an important role in mediating the two cultures. They should tell Chinese visitors to respect the local culture and customs’ (No.8). |
| Insights from the research findings | Royal Botanic Gardens is a very popular place for Chinese visitors. It is visited by almost all Chinese tour groups. Chinese visitors love the plants and animals in the garden but they feel more delighted when interacting with the local people there such as taking photos of Australian children. At weekends or during public holidays, Chinese visitors also have the opportunity to observe local people’s lifestyles such as how Australian families spend their weekend or holidays in a garden. |
| Product Enhancement & Marketing Strategies | Organise study tours for tour operators and Chinese speaking tour guides to familiarise them with what Royal Botanic Gardens offer to visitors and make tour guides more familiar with particular features of Royal Botanic gardens so that they can better facilitate Chinese visitors’ experience with the place; Recommend optional scenic routes to Chinese tour groups according to their interests and length of stay at Royal Botanic Gardens; Promote Royal Botanic Gardens as a place where Chinese visitors could find the opportunity to interact with the locals. |
Chapter 4

CONCLUSIONS AND RECOMMENDATIONS

Contribution to Theory and Methodology

This study identified the temporal and spatial dimensions of the experience of Chinese visitors in Victoria, Australia, elements contributing to satisfaction and dissatisfaction with the visitor experience and experiences sought by Chinese visitors. Evidence from multiple sources of data confirms the findings of previous research (Crompton 2003; Uysal 2003) that visitor satisfaction is explained largely by intangible/expressive attributes, while dissatisfaction is determined mainly by tangible/functional attributes. The results also lend support to the findings of previous research on the Chinese market (TA 2004): Those Chinese tourists want a more flexible itinerary, more contact with locals, and more participation in recreation activities, but provide some basis for questioning previous findings that visitors what more challenging and adventurous experiences. The open-ended responses regarding experiences sought by Chinese visitors help explain why respondents seek or do not seek a particular experience. Taken together, the research findings provide a clearer and more in-depth picture of the visitor experience in general and the experience of Chinese visitors to Victoria, Australia in particular.

The study used a mixed-methods design that produced breadth and depth and enhanced the reliability of the findings. The satisfiers and dissatisfiers emerged from results of visitor interviews and responses from open-ended questions in visitor surveys, thus capturing verbal and written responses of what visitors think and how they feel about their visit. Chinese visitors’ behavioural responses were recorded during observations, adding to the depth and richness of our understanding of the Chinese visitor experience. The multi-methods approach provides a valuable model for other visitor experience research.

Implications for the Tourism Industry

The results of this study provide several implications for the tourism industry. Some of these are site specific, and have been captured in the case study tables presented in the previous chapter.

In addition, the research has state-wide and possibly nation-wide implications. For example, distinguishing between satisfiers and dissatisfiers has significant managerial and marketing implications. Factors that contribute to dissatisfaction (dissatisfiers) make negative memories and negative word-of-mouth that need to be fixed by tourism managers to ‘reduce the probability of a negative experience’ (Crompton 2003), largely through product development and enhancement. For example, to address the tour/itinerary management issue, tour operators might need to consider alternative ways of packaging holidays (Rewtrakunphaiboon & Oppewal 2004) from basic to all-inclusive packages tailored to different needs. Free flyers or booklets containing information on variety of consumer choices such as lifestyle tours, customised package holidays based on prices or brands and advice on how to choose a better tour should be considered.

Furthermore, the findings reveal problems with tour packaging as well as problems with the quality of some accommodation and food outlets, some tour guiding and duty free shops were all a result of intense price competition in the China market. As suggested by past studies (King & McVey 2003) and the findings from the current study, Chinese customers perhaps more than other markets are driven by price and tend to consider low price over quality when selecting a tour. This creates opportunities for unethical practice in this market. As a result, educating potential visitors becomes strategically important. In addition, policy and regulation is needed particularly for problems that fall outside of the control of the tourism industry. Hedonic price theory assumes that ‘the price of a product is a function of its immanent utility-bearing characteristics or attributes’ (Thrane 2005: 302). In other words, products are priced based on the pleasure or benefits they bring to the consumer. If we know what benefits visitors get from the experience, we can use these to determine the value of different types of experiences. This can be used in product development, pricing and marketing, ultimately improving Chinese visitors’ experience in Victoria, maximising yields and increasing profits.

Factors that contribute to satisfaction (satisfiers) identified by this research included quality of natural environment, quality of specific tourism attractions, beautiful scenery, experiencing Australian lifestyle/culture, quality of built/urban environment, quality of tourism infrastructure including accommodation/food, quality of tour guiding and warm/friendly local people. These represent important marketing angles. There is a continued need for quality delivery of expressive attributes such as quality of natural environment and beautiful scenery. These are Victoria’s key strengths and competitive edge, and tourism marketers and managers should be aware and harness these. Marketers can use the responses of visitors to develop appropriate advertising material that Chinese visitors can identify with, such as the expressive and affective benefits of experiencing the state’s quality.
natural environment and beautiful scenery. Respondents who experienced unique attractions, friendly local people and Australian culture and society noted the importance of these to a novel experience. Good service and facilities and good tour guiding services were noted as contributing to a sense of control over the experience. These benefits or rewards should be used for marketing in order to create value and increase the competitiveness of Victoria’s tourism industry.

Experiences sought by Chinese visitors and reasons for seeking a particular experience revealed by the study can be also used for product enhancement and development. For example, the kinds of contacts with locals desired by Chinese visitors can be used for product development. The benefits sought from such an experience can be used to refine and enhance the available programs or products that provide access to locals. Based on the findings, the key benefits or value Chinese visitors seek appear to be related to the affective dimension of their experience. Tourism stakeholders should consider how to create and deliver such experiences to increase Chinese visitors’ satisfaction.

There was a statistical significant difference between respondents with previous travel experience vs. without previous travel experience with respect to desire for more contact with locals (i.e. more experienced travellers were more likely to want this). There is a relatively strong linear relationship between education level and desire for having more participation in recreation activities (i.e. more educated respondents were more likely to seek this particular experience) but an inverse relationship between age groups and the desire for a more challenging or adventurous holiday and for more contact with locals (i.e. younger Chinese visitors were more likely to want these things). Another variable that was significant was place of origin – visitors from Shanghai were more likely to want a more challenging or adventurous holiday than were visitors from other regions. Tourism marketers can use these findings to identify market segments and provide suitable communication messages and products to different consumer groups of the China market. The industry could utilise the results to explore the viability of developing new products aimed at (1) experienced/repeat visitors, (2) educated visitors, (3) younger visitors and (4) the Shanghai market.

Findings from this study confirm the results from previous studies that perceptions of substandard facilities and services by respondents were mainly due to the unethical practices in business activities in this market resulting in cost-cutting and low quality. To address these problems, the Australian government has recently developed the new ADS arrangement and new ADS Code of Business Standards and Ethics. The reforms to the ADS scheme may require an auditing program to monitor the business practices in the China market.

The results also reveal that tour guides play an important role in facilitating Chinese visitors’ experience as the guiding service is identified as a factor that can lead to both satisfying and dissatisfying experiences. This also indicates that the quality of tour guiding provided to the China market in Victoria varies widely. China is currently the third largest source market to Victoria. It is predicted that by 2013, China will be the largest inbound market for Victoria. To ensure that Chinese visitors have a quality holiday experience facilitated by professional tour guides, the Victoria government, Tourism Victoria and the Professional Tour Guide Association (PTGGA) and Guide Association Australia (GOA) should work together to raise Chinese-speaking tour guides’ standards, and may need to consider implementing compulsory training and licensing for this sector. It is a big step forward that Guiding Association Australia (GOA) was granted government funding to develop and implement a National Tour Guide Accreditation Framework. This program could prove instrumental to the improvement of guiding quality for the China market. However, it seems that most Chinese-speaking tour guides are not members of any of Australia’s professional tour guide associations. There are differences between English-speaking tour guides or Japanese-speaking tour guides and Chinese-speaking tour guides such as background characteristics, professional training and English language proficiency. Therefore, special training programs should be considered for the Chinese-speaking tour guides.

**Avenues for Further Research**

This study combined qualitative and quantitative methods to provide both breadth and depth of information and analysis of the Chinese visitor experience. However, it was undertaken with a very limited budget and timeline. A detailed and in-depth analysis of the visitor experience employing participant-observation and interviews with a sample of tourists on one or more ADS tours (including pre-visit and post-visit components) would make an excellent follow-up to this study. Such ethnographic research takes considerable expertise, time, resources and sensitivity, as the researcher needs to establish rapport with the tour operator, guide(s) and clients before being able to gain access to the experience and thus get rich and meaningful data. However, given the importance of this market segment, the investment would no doubt yield dividends in terms of adding to our understanding of what Chinese tourists really experience when they visit Australia.

With respect to other avenues for further research, this study collected data only from (and about) Chinese tourists on pre-booked group tours, so replication is needed to address the research questions for other types of tourists and in the context of other types of experiences such as independent travellers from China, tourists visiting friends and relatives, and visits for study or business purposes. The focus was on the visitor’s experience in the State of Victoria and the data were collected from visitors while travelling in Victoria, thus pre-trip
expectations or post-trip reflections could not be measured. A study encompassing other stages of the travel experience would provide a more holistic view of Chinese visitors’ experiences.

Data were not collected from non-visitors, and it is acknowledged that experiences sought (desired) by this population may be completely different to those who have travelled to Australia. Although there is no systematic bias in the way the population was sampled, whether the respondents in the study are representative of the wider visiting population from China remains unknown, and further research needs to be undertaken in the country of origin to answer this question. Research on new target markets in China require a similar research approach.

As mentioned in the introduction, this study did not measure cause-and-effect directly, so despite our efforts to assess whether the presence of particular elements or factors contributed to or facilitated satisfaction (or, alternatively, facilitated dissatisfaction), we cannot conclude that the former caused the latter. We can, of course, report what visitors said about the factors or elements that they perceive to have contributed to their satisfaction or dissatisfaction. The elements contributing to satisfaction or dissatisfaction that emerged in this study could now be used in a follow-up quasi-experimental study to examine such cause-and-effect relationships.

As noted in the introduction, Fournier and Mick (1999) caution against generalising the relevance of both findings and methods to tourists with different cultural backgrounds. This study has had a very specific focus and context, and replication is needed to determine the relevance of the instruments and findings to other cultural contexts. A comparative study might provide interesting findings on the application of the research methods and findings to other cultural groups. While the results are consistent with previous findings, much more research is needed in other tourism contexts regarding the extent to which expressive elements of the visitor experience tend to dominate in satisfaction ratings and functional elements dominate in dissatisfaction ratings.
APPENDIX A: DATA SOURCES, INSTRUMENTS AND SAMPLE SIZES

<table>
<thead>
<tr>
<th>Methods of data collection</th>
<th>Unobtrusive observation</th>
<th>Participant observation</th>
<th>Visitor &amp; tour guide interview</th>
<th>Visitor survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruments</td>
<td>Observation recording sheet</td>
<td>Observation recording sheet &amp; notes</td>
<td>Interview questions</td>
<td>Questionnaire</td>
</tr>
<tr>
<td>Sample size</td>
<td>37 (number of groups)</td>
<td>8 (number of observations, not groups)</td>
<td>27 (visitors) &amp; 7 (tour guides)</td>
<td>401</td>
</tr>
</tbody>
</table>


APPENDIX B: RESEARCH INSTRUMENTS

All instruments were translated into Chinese and all data collection was conducted in Chinese. Responses were transcribed and translated back to English for this report.

APPENDIX B1 OBSERVATION RECORDING SHEET

<table>
<thead>
<tr>
<th>ID</th>
<th>Date</th>
<th>Weather</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group size</td>
<td>Type of tour</td>
<td>Place of origin</td>
</tr>
<tr>
<td>Gender</td>
<td>Age</td>
<td></td>
</tr>
<tr>
<td>Place</td>
<td>Arrived</td>
<td>Departed</td>
</tr>
<tr>
<td>Entrance</td>
<td>Exit</td>
<td></td>
</tr>
</tbody>
</table>

| Activities participated, sites visited at the place  
(objective 1) |
|----------------|

<table>
<thead>
<tr>
<th>Verbal behaviours</th>
</tr>
</thead>
</table>
| Comments they make about the visit  
(objectives 1, 2 & 3) |
| Questions they ask about the place  
(objectives 1, 2 & 3) |
| Suggestions they offer  
(objectives 3) |

<table>
<thead>
<tr>
<th>Nonverbal behaviours</th>
</tr>
</thead>
</table>
| Other non-verbal responses (e.g. photo taking behaviours)  
(objectives 1) |
| Interaction with locals  
(objectives 1) |

<table>
<thead>
<tr>
<th>Observe whether the tour guide  (objective 2 &amp; 4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides orientation/access</td>
</tr>
<tr>
<td>Provides commentary about the place</td>
</tr>
<tr>
<td>Responds to questions</td>
</tr>
<tr>
<td>Facilitate interaction with place</td>
</tr>
<tr>
<td>Facilitate interaction with locals</td>
</tr>
<tr>
<td>Provides advice on cross-cultural protocol</td>
</tr>
<tr>
<td>Gives the group options (flexibility)</td>
</tr>
</tbody>
</table>
APPENDIX B2 CHINESE VISITOR SURVEY

The aim of this survey is to understand the expectations and experiences of your visit to the state of Victoria (Melbourne area) in order to assist tourism product development and marketing strategies, ultimately to improve Chinese visitors’ experiences to Australia in general and to Victoria in particular. We need your help to fill in this questionnaire. You do not need to put your name and address in the questionnaire. All your answers will be treated confidentially. No one except the researchers will have access to the data. You can return the completed questionnaire to the researchers or send it by using the prepaid envelope we gave you. If you have any queries, please do not hesitate to contact the following address: The Secretary, the Standing Committee on Ethics in Research Involving Humans, PO Box No 3A, Monash University, Vic. 3800. Thank you very much for your cooperation.

First, we would like to learn about your past travel experience and your current trip. Please tick one box like this: ☑️ Or fill in where appropriate.

1. **Have you previously travelled to the countries or regions below?** (tick all that apply, please do not include this trip)
   - Asia
   - USA
   - Africa
   - Europe (please list countries visited)
   - Other (please specify)

2. **Who are you travelling with?** (tick all that apply)
   - Spouse
   - Children
   - Colleagues
   - Friends
   - Alone
   - Other (specify)

3. **How many people are there in your tour group?** ______ people (including yourself)

4. **How long do you plan to stay in Australia?** ___ nights; in the state of Victoria (Melbourne area)? ____ nights.

5. **What is the type of your tour?** (tick one only)
   - Holiday
   - Business
   - Incentive travel
   - Other (specify)

6. **What type of visa do you hold?** (tick one only)
   - Tourist (ADS)
   - Tourist (676)
   - Business (456)
   - Other (specify)

7. **Why did you choose to come to Australia?** (please answer all items)
   - To investigate business opportunities
   - To go to a place where I have not been
   - To have fun
   - To view the natural landscape
   - To see the life of the local people
   - To experience Australia’s sense of freedom
   - To relax and rest
   - To have a chance to participate in recreation activities
   - To investigate Australia’s schools and education system
   - To go sightseeing
   - Other (please specify)
For the following questions, think only of your experience here in the state of Victoria (including places such as Melbourne, Sovereign Hill, Phillip Island, Great Ocean Road etc.).

8. The things I liked best about my visit to the state of Victoria (Melbourne area) (perhaps compared to other parts of Australia)

_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

The reasons why these are satisfying
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

9. The worst/most dissatisfying things about my visit to the state of Victoria

_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

The reasons why these are unsatisfying
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

10. On this trip to Australia, which places have you already visited? (tick all that apply)

☐ Sydney  ☐ Canberra  ☐ Brisbane  ☐ Gold Coast

☐ Cairns  ☐ Other (please specify) __________

11. What is your overall level of satisfaction with your experience to the state of Victoria, comparing with other places you have visited in Australia? (e.g. Sydney, Brisbane, Gold Coast, Canberra, Cairns and etc. if applicable)

☐ Much less satisfying  ☐ The same  ☐ Much more satisfying

What I mean by this is
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

Overall satisfaction with your visit to Australia (Select the answer best representing your opinion)

I = Extremely dissatisfied  7 = Extremely satisfied

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  ☐ 6  ☐ 7

What I mean by this is
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
12. How likely is it that you will recommend your visit to Australia to friends/relatives?  
(Select the answer best representing your opinion)  

\[ \begin{array}{ccccccc} 1 & 2 & 3 & 4 & 5 & 6 & 7 \\ I = Very unlikely & & & & & & 7 = Very likely \\ \end{array} \]

What I mean by this is ________________________________________________
_____________________________________________________________________
_____________________________________________________________________

13. How likely is it that you will come back to Australia for a repeat visit in the future?  
(Select the answer best representing your opinion)  

\[ \begin{array}{ccccccc} 1 & 2 & 3 & 4 & 5 & 6 & 7 \\ I = Very unlikely & & & & & & 7 = Very likely \\ \end{array} \]

What I mean by this is ________________________________________________
_____________________________________________________________________
_____________________________________________________________________

**About your desires and future behavioural intention**

In the future, if I travel,

14. I would like a more challenging or adventurous holiday  
\[ \begin{array}{c} \square \quad Yes \quad \square \quad No \end{array} \]

What I mean by this is ________________________________________________
_____________________________________________________________________
_____________________________________________________________________

15. I would like to have a more flexible itinerary  
\[ \begin{array}{c} \square \quad Yes \quad \square \quad No \end{array} \]

What I mean by this is ________________________________________________
_____________________________________________________________________

16. I would like more contact with locals  
\[ \begin{array}{c} \square \quad Yes \quad \square \quad No \end{array} \]

What I mean by this is ________________________________________________
_____________________________________________________________________

17. I would like to have more participation in recreation activities  
\[ \begin{array}{c} \square \quad Yes \quad \square \quad No \end{array} \]

What I mean by this is ________________________________________________
_____________________________________________________________________

18. Other (please specify)

____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

We need to know a little more about yourself in order to compare your results with others

19. Your gender:  [ ] Male  [ ] Female

20. Your age (tick one only)
[ ] 18-24  [ ] 25-34  [ ] 35-44  [ ] 45-54  [ ] 55-64  [ ] 65+

21. Highest level of education completed (tick one only)
[ ] High school or less  [ ] Vocation school  [ ] University or equivalent
[ ] Postgraduate

22. Which part of China are you from? (tick one only)
[ ] Beijing  [ ] Shanghai  [ ] Guangdong  [ ] Tianjin
[ ] Hebei  [ ] Shandong  [ ] Chongqing  [ ] Jiangsu
[ ] Zhejiang  [ ] Other (please specify) __________

23. Your command of English language: (tick one only)
[ ] Fluent  [ ] Conversational  [ ] Broken  [ ] None

24. Your occupation: (tick one only)
[ ] Government official  [ ] Administrator  [ ] Technician/engineer
[ ] Teacher/researcher  [ ] Factory worker  [ ] Businessman/woman
[ ] Other (please specify) __________

25. If you have any other comments or suggestions about the experience of your visit to Australia, please feel free to tell us.
APPENDIX B3 VISITOR INTERVIEW QUESTIONS

1. Thinking back to what you expected when you first planned this trip, looking at the itinerary, cost and so on and finally made the decision to come on this particular trip, tell us what in particular you were expecting that hasn’t worked out quite as you expected. These are things that you might tell a friend or relative about back home.
   a. If you ever do this trip, you would not want to……
   b. How would you finish this sentence with your friend: I was disappointed that I wasn’t able to……?
   c. What did happen that made the trip particularly good?
   d. What did not happen that made the trip particularly bad?
   e. What did you like most? Why?
   f. What did you like least? Why?

Prompts:
Anything to do with the itinerary itself? If you were home now telling a friend about this trip, would you say that the days went pretty much as you expected? Did you spend the ‘right’ amount of time doing things that you expected? Too much time doing anything or being anywhere? Not enough time? What if your friend asked you if there was any aspect of this trip that really fell short of what you were expecting? Is there anything you would say were disappointed about?
Was there anything missing from your experience?
Did anything happen or was there any part of it you wish hadn’t happened? Any particular event or incident? Why do you say this?
Was anything included in the tour you wish hadn’t been? Anything you might tell others about?
Anything you wouldn’t tell anyone about, but you still wish it hadn’t happened?
[For each of these, ‘why? What exactly do you mean by that?’]

2. Now, thinking back again to when you first planned this trip, I want you to think about the dreams or desires that you maybe had about this trip. These are things that you might not have expected, but you sure hoped would be part of the trip. These are things you might tell a friend or relative about back home, that really made the trip worthwhile or special or memorable. (objectives 2 and 3)
   a. How would you finish this sentence with your friend: ‘If you ever do this trip, you would want to …’
   b. How would you finish this sentence with your friend: ‘I was so pleased that …’

Prompts:
Anything to do with the tour itself? Things like quality of tour guiding, and flexibility of itinerary, Why is this special or memorable to you?
Was there any particular incident or experience you had that particularly stands out as being special?
What made this special or memorable for you?
Anything to do with a particular person or group of people? Things like contact with local people, with your tour guides or with your group members. Tell me why this was so special or memorable for you?
What if your friend asked you what was the highlight of your trip – what would you say? What made it the highlight?
[For each of these, ‘why? What exactly do you mean by that?’]
REFERENCES


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Betty Weiler is Director of the Monash Tourism Research Unit and Professor of Tourism at Monash University and has been teaching, researching and writing in the area of tourism marketing, management and planning for twenty years. She has published over one hundred journal articles and book chapters, presented 15 invited addresses and plenaries, and delivered dozens of symposia papers and workshops. Dr Weiler has managed or co-managed over a dozen major research projects and seven international and national consultancy projects related to tourism, and is known for her industry-relevant and applied research focus. Email: Betty.Weiler@buseco.monash.edu.au

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The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government’s Cooperative Research Centres Program. STCRC is the world’s leading scientific institution delivering research to support the sustainability of travel and tourism - one of the world’s largest and fastest growing industries.

Research Programs

Tourism is a dynamic industry comprising many sectors from accommodation to hospitality, transportation to retail and many more. STCRC’s research program addresses the challenges faced by small and large operators, tourism destinations and natural resource managers.

Areas of Research Expertise: Research teams in five discipline areas - modelling, environmental science, engineering & architecture, information & communication technology and tourism management, focus on three research programs:

- **Sustainable Resources**: Natural and cultural heritage sites serve as a foundation for tourism in Australia. These sites exist in rural and remote Australia and are environmentally sensitive requiring specialist infrastructure, technologies and management.

- **Sustainable Enterprises**: Enterprises that adhere to best practices, innovate, and harness the latest technologies will be more likely to prosper.

- **Sustainable Destinations**: Infrastructural, economic, social and environmental aspects of tourism development are examined simultaneously.

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- **THE-ICE**: Promotes excellence in Australian Tourism and Hospitality Education and facilitates its export to international markets.

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