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Journal of Tourism, Heritage & Services Marketing (JTHSM) is an international, open-access, multi-disciplinary, refereed (double blind peer-reviewed) journal aiming to promote and enhance research in tourism, heritage and services marketing, both at macro-economic and at micro-economic level.

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 GVK Union Catalogue & Foundation of Prussian Cultural Heritage

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# Editorial

 **Evangelos Christou**, Editor-in-Chief  
International Hellenic University, Greece

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Zayed University, United Arab Emirates

**JEL Classification:** L83, M1, O1

**Biographical note:** Evangelos Christou is professor of tourism marketing and Dean of the School of Economics & Business at the International Hellenic University, in Greece (echristou@ihu.gr). Anestis Fotiadis is professor of tourism, at the College, of Communication & Media Sciences, at Zayed University, in the United Arab Emirates (anestis.fotiadis@zu.ac.ae).

## 1 INTRODUCTION

Time for celebration! The Journal of Tourism, Heritage & Services Marketing achieved a CiteScore of 5.5 for 2022 and Q2 classification in Scopus.

We are pleased to present the seventeenth publication of JTHSM (volume 9, issue 1), the first issue in its ninth year of publication. In previous issues, this journal presented original refereed papers, both conceptual and research-based, focused on various topics of tourism, heritage, and services with an emphasis on marketing and management. Volume 9, issue 1 focus on furthering the journal's scope and consolidating its position in both conceptual developments and practical applications in tourism, heritage, and services through publication of six quality manuscripts that underwent rigorous double-blind reviewing: five full papers and one case study.

## 2 PRESENTATION OF THE FIRST ISSUE FOR 2023

The present issue of JTHSM contains six manuscripts written by seventeen authors located in six different countries and affiliated with twelve different universities.

E-loyalty formation of Generation Z in relation to personal characteristics and social influences appears to have an impact on the tourism industry. The aim of the first full paper, written by Ranjit Singh and P.S. Sibi, both from Pondicherry University in India, is to address the dearth of research regarding children in the tourism industry and cognate sectors, alongside contributing to examines the personal characteristics and social influence of Generation Z on their e-loyalty towards tourism websites. In contrast to previous models, this study explores the effect of perceived compatibility and innovativeness (personal characteristics) and subjective norm (social influence) on perceived usefulness and trust on tourism websites, which in turn influence e-loyalty in a generational context. These factors

are crucial in e-commerce, but they have not been studied together in the context of tourism, especially for Generation Z. Using a sample size of 389 respondents falling within Generation Z in India, the proposed model was validated using PLS-SEM. A quantitative approach was followed in this study and the data was collected by using a survey questionnaire. Within the wider context of technology adoption, the findings show the decisive role of both personal characteristics and social influence in determining the e-loyalty of Generation Z towards tourism websites. The implications of understanding the e-loyalty of Generation Z may assist tourism firms in retaining them by developing and implementing effective marketing strategies. Moreover, the study's most significant contribution is that it considers Generation Z, a generation that will shape the world's future economy and a digital sector with significant purchasing power and influence.

The second full paper is written by Juan Gabriel Brida and María Nela Seijas Giménez, both from Universidad de la República, Uruguay, and Erika Lourdes González Rosas from University of Guanajuato, Mexico. The purpose of this study is to explain the determinants of the degree of visit satisfaction to the Guanajuato Mummies Museum. The study contributes to the literature related to perceptions and attitudes of museum visitors, by identifying what factors explain the satisfaction with the visit; as to the best of our knowledge, no similar investigation has been carried out yet. A survey was used to collect the data (n=392) from national and foreign visitors of the said museum, containing sociodemographic variables, opinions and feelings of the visitors and information about the visit. Data analysis was conducted with an ordered Logit model. Findings indicate that opinions about the activity of the museum, the guided tour and the rest area are the most significant determinants of visitors' satisfaction, while the library and facilities for the disabled are moderately important. Feelings of enjoyment, tiredness or boredom marginally affect visitors' satisfaction. Knowledge of the satisfaction factors can guide marketing





strategies and direct the training of personnel as recommended by ICOM (International Council of Museums) to continue contributing to the improvement of services offered, increasing the levels of satisfaction, and leading to repeat visits.

In the third full paper, Iva Bulatovic from HCT University in the United Arab Emirates and Andreas Papatheodorou affiliated with the University of the Aegean in Greece, and the University of New South Wales in Australia, investigate the role of civil aviation in the case of Montenegro, one of the smallest countries in Europe and one whose economy heavily relies on tourism. For this research, a dynamic panel data approach is used, where five models are proposed for modelling tourism demand. Available seats per kilometer, the Herfindahl–Hirschman index, jet fuel prices, exchange rates, and seasonality are used as the models' explanatory variables, in line with the available literature. The econometric results show that all suggested models are valid, the explanatory variables are statistically significant, and their coefficients have the expected sign, suggesting a strong relationship between tourism demand and civil aviation. Apart from being one of the first attempts to highlight the civil aviation and tourism nexus in the context of Montenegro, this paper contributes to the literature by suggesting a way forward for destination managers and policymakers in small countries with great tourism potential. The fourth full paper is written by three authors based in India, Shahzar Ali Khan, Verda Khan and Mohd Asif Khan, all affiliated with Aligarh Muslim University. Although volunteer tourism has been studied via several theoretical lenses, little is known about the behavioural intention of potential volunteer tourists from developing nations. This study aimed to identify the behavioural intention of potential volunteer tourists and the factors motivating them. This study extends the theory of planned behaviour (TPB) to identify the potential volunteer tourists' behavioural intentions by adding four motivations: altruism, personal development, escape, and travel. A total of 272 valid responses were collected through an online survey. SmartPLS 3.0 was used to test the hypotheses. The findings indicate that attitude, perceived behavioural control, subjective norms, escape, and personal development positively influences potential volunteer tourists' intention to take part in volunteer tourism programs. However, altruism and travel do not influence the potential volunteer tourists' intention to take part in volunteer tourism programs. Volunteer tourism organisers will get help from the present study's findings to design or improve volunteer tourism programs and activities accordingly, resulting in improved volunteer tourism experiences and, ultimately, impacting the tourists' intention to take part in volunteer tourism programs.

The fifth full paper comes also from two authors based in India; Manjula Chaudhary from Kurukshetra University and Naser Ul Islam from Tata Institute of Social Sciences. This research aims to present a Tourism Risk Index (TRI) for risk analysis at tourism destinations that can act as a usable tool to accurately capture the perception of risk by tourists. The TRI for this study is developed in Kashmir valley (India). The development of index began with the assumption that general perceptions echoed through mass media and word of mouth about the lack of security in the Kashmir valley are correct.

It was followed by a survey of 370 tourists visiting the valley about common types of risks identified through the literature on tourism. The results are not along expected lines rather suggest that visiting tourists perceive Kashmir valley as safe. The findings show that Kashmir valley is perceived overall as less risky on all components, and in descending order, these ranks as personal safety, natural risk, cultural risk, and human-induced risk. Destination managers would have promoted Kashmir valley with a different level of confidence if this insight would have been available to them, and the possibility of its positive effect on the perception of tourists not visiting the valley cannot be ruled out. The index can be used to consistently track the tourism risks of Kashmir or any other destination by inclusions of new risks as they crop up from time to time.

An interesting case study was written by five authors, two of them based in United Arab Emirates and three based in Australia, respectively: based at the USA: John Rice and Muhammad Mustafa Raziq from University of Sharjah, Bridget Rice from Zayed University, Nigel Martin from Australian National University, and Peter Fieger from University of New England. This case study examines Marriott Corporation's large and successful spinoff between 1993 and 1995 and the concomitant adoption of a corporate ALFO strategy enabled by the transfer of assets and debt between the two entities. As an example of corporate restructuring, it involves changing ownership, operational structure, or business activities within a corporation in order to improve shareholder performance. Key directional changes in Marriott's history that have changed the structure of the business is used to examine the spinoff and ALFO strategy adaptation. Marriott have been characterised by a small number of significant and foresightful innovations. There was a great deal of importance attached to the company's move away from food service and towards accommodation in the future. There is no doubt that these investments have been probing in nature in the recent past, but they are significant in terms of scale and commitment in the future. Marriott's success can be attributed to the fact that the company has a flexible corporate strategy that focuses on high growth and high yield business opportunities, as well as the willingness to dispose of assets that don't provide this outcome. As a result of this focus, the company was able to grow globally from the 1990s onwards. Ultimately, it can be said that the company's success can be attributed to the fact that it has adapted appropriately and successfully to changing operational and industry realities over the course of many decades, especially as exigencies in the asset and debt markets rendered the portfolio structure it had developed over so many decades unsustainable.

Based on the above, we trust that you will enjoy reading this new issue of JTHSM!


Evangelos Christou  
International Hellenic University  
Editor-in-Chief

Anestis Fotiadis  
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Co-Editor



# E-loyalty formation of Generation Z: Personal characteristics and social influences

 **Ranjit Singh**  
Pondicherry University, India

 **P.S. Sibi**  
Pondicherry University, India

## Abstract:

**Purpose:** This study examines the personal characteristics and social influence of Generation Z on their e-loyalty towards tourism websites. In contrast to previous models, this study explores the effect of perceived compatibility and innovativeness (personal characteristics) and subjective norm (social influence) on perceived usefulness and trust on tourism websites, which in turn influence e-loyalty in a generational context. These factors are crucial in e-commerce, but they have not been studied together in the context of tourism, especially for Generation Z.

**Methods:** Using a sample size of 389 respondents falling within Generation Z in India, the proposed model was validated using PLS-SEM. A quantitative approach was followed in this study and the data was collected by using a survey questionnaire.

**Results:** Within the wider context of technology adoption, the findings show the decisive role of both personal characteristics and social influence in determining the e-loyalty of Generation Z towards tourism websites.

**Implications:** The implications of understanding the e-loyalty of Generation Z may assist tourism firms in retaining them by developing and implementing effective marketing strategies. Moreover, the study's most significant contribution is that it considers Generation Z, a generation that will shape the world's future economy and a digital sector with significant purchasing power and influence.

**Keywords:** e-loyalty; Generation Z; Perceived compatibility; Innovativeness; Subjective norm; Tourism websites

**JEL Classification:** A13, C31, L84

**Biographical note:** Ranjit Singh (Iranjit.singh86@gmail.com) is a PhD scholar in tourism at the Department of Tourism Studies, Pondicherry University, Puducherry, India. His ongoing research is in the area of loyalty, tourism policy and planning and destination management. P.S. Sibi (sibigeorgekutty@gmail.com) is an Associate Professor at the Department of Tourism Studies, Puducherry, India. Her areas of interest are special interest tourism, loyalty, travel agency management, tour operation, accessible tourism, inclusive tourism, and gender. Corresponding author: Ranjit Singh (Iranjit.singh86@gmail.com).

## 1 INTRODUCTION

Commercial transactions on the internet, commonly referred to as e-commerce in tourism, have been growing significantly in recent years due to the advancement of information technology and its convenience for the customer to organize the trip, especially among the section of young consumers (Song et al., 2021). Consequently, travellers increasingly seek and use information from various sources, evaluate the information, and make a decision. Tourist destinations tend to change with a single "click". Therefore, tourism managers utilize websites to influence consumer's decisions, market tourism products, and attract and keep customers, thereby gaining commercial and financial benefits for their

organizations (Buhalis et al., 2020). Considering all these reasons and factors such as customer acquisition cost, multiplayer competitive market with multiple channels, the intangible nature of tourism product, insecurity associated with e-commerce and high consumer demand, there is a significant interest among the scholars to understand online consumer behavior in tourism, particularly their e-loyalty (Abou-Shouk & Khalifa, 2017; Valvi & Fragkos, 2012). Finding elements that influence e-loyalty is essential to online travel websites, especially for generational cohorts like Generation Z, who are tech-savvy and extremely different from previous generations (Fernandes & Radebe, 2018). Existing literature on e-loyalty frequently focuses on technical aspects like website quality (Mahadin et al., 2020; Tsai, 2017) and security (Cui et al., 2018; Cui et al., 2015;



Bui, 2022), or it is limited to relational factors like satisfaction (Christou, 2010; Jeon & Jeong, 2017; Parra-Lopez et al., 2018). For Generation Z, these technological and relational features might not be enough to explain their loyalty, given the influence of changing technology on their decision-making behavior. According to studies (Dimitriou & AbouElgheit, 2019; Priporas et al., 2017; Thees et al., 2021), Generation Z have distinct attitudes, characteristics, and behaviors compared to previous generations and targeting them is recognized as the most significant challenge in the future of marketing. More precisely, it warrants additional research on understanding the formation of e-loyalty and developing new causal models from existing ones, given that this subject has received little attention and that, now more than ever, the website serves as a critical link between consumers and products.

Research on e-loyalty studying Generation Z is crucial from both theoretical as well as managerial perspectives. Firstly, they have a population of 2.5 billion, with fastest income growth and it is expected to quadruple to about \$33 trillion (Schroders Wealth Management, 2021). Secondly, they are also socially conscious, technologically savvy, and extremely innovative they seek change constantly, and are comfortable in the virtual world. Therefore, they are more likely to participate in activities like online shopping and have a different response to e-commerce than prior generations (Dimitriou & AbouElgheit, 2019).

Generation Z customers have witnessed several political, social, technical, and economic shifts throughout their brief lifetimes. Therefore, "Consumers are less loyal to retailers, and they expect retailers to get the product to them, as a consequence retailers feel pressure to find new ways to grab and hold consumers' attention. They have higher expectations, no brand loyalty and care more about the experience" (Priporas et al., 2017, p. 376). Additionally, they adopt innovative technologies particularly related to their lifestyle (Wood, 2013). Furthermore, remaining connected with their social-circle through social media is crucial in their lives. Therefore, the influence of social groups termed subjective norms is a critical factor influencing their behavioral intention, including loyalty (Broadbent et al., 2017; Krakover & Corsale, 2021).

Hence, unlike their earlier generational cohort, social influence and personal characteristics can influence e-loyalty of Generation Z significantly. Therefore, the existing models of e-loyalty may have limitations while describing e-loyalty of Generation Z. Nevertheless, despite their importance as a potential niche market, studies reflecting the formation of e-loyalty of Generation Z are limited (Martínez-González & Álvarez-Albelo, 2021; Nechoud et al., 2021) in the context of tourism especially the literature addressing the influence of personal characteristics and social influence.

To fulfil this gap, this study has proposed and tested a novel model that may help understand the formation of e-loyalty from the perspective of Generation Z. By contextualizing the effect of personal characteristics such as perceived compatibility (Ahmet Bulent Ozturk et al., 2016) and innovativeness with new technologies (F Cui et al., 2018) and social factors like the subjective norm (Ruiz-Mafe et al., 2016) on their perceived usefulness and trust and the effect of perceived usefulness and trust on their e-loyalty, the study has validated the proposed model using PLS-SEM. Finally,

following the other tourism researchers, the study has also included an Importance-Performance Analysis (IPMA) to aid the process (Martínez-González & Álvarez-Albelo, 2021). Moreover, the investigation of this group represents a generational approach that has the potential of generalizability because homogenous online marketing activities may be adopted on a worldwide scale.

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## 2 LITERATURE

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### 2.1 E-loyalty and its drivers

According to Anderson & Srinivasan, (2003, p. 125) "e-loyalty is defined as the customer's favorable attitude toward an electronic business resulting in repeat buying behaviour". E-loyalty, or online loyalty is the consumers intention to repurchase and revisit a website even though other websites are available (Cyr, 2008). Tourism literature defines it as an attitude of preference or favorability toward a travel website, which results in a desire to purchase from it (Cui et al., 2018). With the development of e-commerce in tourism, a growing interest has been observed among scholars in understanding e-loyalty (IJspeert & Hernandez-Maskivker, 2020; Purwanto, 2022). Consumer e-loyalty is now considered to be one of the most crucial issues for academics and industry professionals involved in marketing and management of tourism (Mahdzar et al., 2022). This is because it allows developing and maintaining a continuously beneficial relationship with consumers, leading to increased sales and profits for tourism businesses (Chatzigeorgiou, 2017; Abou-Shouk & Khalifa, 2017). Retaining an existing customer is a financial imperative for online businesses as soliciting new customers is considerably expensive (Lin & Luarn, 2003). Moreover, online loyalty has been examined less than offline loyalty, with very little research being done in the tourism industry and much lesser research is being done among young people compared to other segments (Buhalis et al., 2020).

When it comes to defining and measuring e-loyalty in the tourism industry, there is no general agreement. Indeed, in the research, e-loyalty has been primarily regarded as an extension of offline consumer loyalty (Gommans et al., 2001). Just as it does in the offline context, an attitudinal approach to loyalty predominates over a behavioral approach (McKercher et al., 2012) in the literature. However, it has been argued that intention is a better predictor of actual behavior (Amaro & Duarte, 2013; Buhalis et al., 2020).

The Technology Acceptance Model has served as the basis for the vast majority of the research that has been done on e-loyalty. This model developed by Davis et al., (1989) has been extended, modified and applied in various research settings (Amaro & Duarte, 2015; Lew et al., 2020; Pavlou, 2003). Both ease of use and usefulness continue to be essential elements in TAM models, which are used to judge whether new technologies are adopted or if users remain loyal to existing technologies online.

The current research takes this broad framework as its starting point and acknowledges the essential role that trust and perceived usefulness play in shaping the e-loyalty of Generation Z to online travel websites. On the other hand, this study considers a set of personality traits and social influence as extraneous variables rather than features relevant to the evaluation of the technology itself. The report

concentrates on behavioural aspects associated to a certain section of customers known as Generation Z. As a result, the innovation diffusion model is being utilised in this investigation in order to establish the antecedent variables. The innovation diffusion model has been utilised to explain the online purchasing behaviour in a variety of settings (Min et al., 2019). This model highlights the factors influencing the attitude towards a new market offering. The factors include personal innovativeness, nature of the innovation, the uncertainty or risk factors (Purani et al., 2019). Primarily, based on this theory, this study considers perceived compatibility, subjective norm, and innovativeness as the variables influencing perceived usefulness and trust, which in turn affects loyalty of the customer.

## 2.2 Generation Z

People born between 1995 and 2010 are called Generation Z (Katz et al., 2022). They are true digital natives because they have grown up with access to digital technologies such as the internet, social networks, and mobile devices. As a result, they are adept at using these tools to gather information from a variety of sources, analyse it, and draw meaningful conclusions. Younger generations favour the Internet as a source of knowledge since it is the most accessible and user-friendly information resource (Puiu et al., 2022). They are brand-savvy shoppers who have seen it all and know exactly where to look for the products they desire. They are more analytical and pragmatic in their decision making and interactions with institutions; they view consuming as a right of passage rather than a commodity; they see it as a means of expressing their unique sense of self; and they become increasingly concerned with ethical issues (Baltescu, 2019). According to Thangavel et al. (2022), today's youth value autonomy above obedience, are independent yet value teamwork, seek happiness, and need guarantees about their future.

Although wealth, education, occupation, family size, composition, and so on all have a role in determining whether or not an individual decides to take a vacation, the literature often analyses tourism consumption behaviour without explicitly invoking the life cycle model. However, cohort effects are quite powerful in influencing vacation-planning decisions (Baltescu, 2019). According to research by Haddouche & Salomone (2018), young travellers who identify as part of Generation Z can be challenging to keep as customers because of their pampered nature. The travel habits of Generation Z, represent a departure from the norm when it comes to how tourists interact with the local environment and community (Baltescu, 2019).

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## 3 HYPOTHESIS DEVELOPMENT

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### 3.1 Perceived compatibility

Research has shown that members of Generation Z prefer products and services that are compatible with their lifestyle and value systems (Broadbent et al., 2017). Additionally, perceived compatibility has been shown to be a crucial personal characteristic that influences the willingness to use electronic wallet of Generation Z (Do & Do, 2020). Generation Z has never known life without the internet, unlike previous generations. Since birth, they have been

exposed to the internet, so they have a strong grasp of technology and are accustomed to using it (Goh & Lee, 2018). Therefore, they would be more likely to use online travel websites (Vieira et al., 2020).

It is expected that customers will adopt more quickly if they perceive that online purchases do not conflict with their interests and preferences (Peña-García et al., 2020; Nella & Christou, 2021). Since online purchases match their values, lifestyle and habits of Generation z, they develop a sense of trust on the online travel websites. Previous studies also support that compatibility positively influences trust (Cazier, 2003; Cazier et al., 2002). Türker et al. (2022) concluded that perceived compatibility positively influence trust. Similarly, Williams et al. (2017) also identified a significant relation between perceived compatibility and trust.

In the online travel website context, usefulness describes how a particular website can facilitate accomplishing shopping-related tasks. Generally, technology-compatible people instantly regard the technology as consistent with their pre-existing thoughts about the technology and their requirements for it. As a result, usability beliefs are easily triggered.

People from Generation Z, are known for their innovativeness, and their strong ideas regarding the usability of emerging technologies (Purani et al., 2019). Previous literature supports a statistically significant association between compatibility and perceived usefulness (Agarwal & Karahanna, 1998; Crespo & Rodríguez, 2008). Türker et al. (2022) identified perceived compatibility strongly influence perceived usefulness in the online context. Purani et al. (2019) also concluded that perceived compatibility of the website significantly determine the perceived usefulness. Therefore, the study hypothesizes that

*H1. Perceived compatibility of travel websites has a positive and direct influence on perceived usefulness.*

*H2. Perceived compatibility of travel websites positively influence trust.*

### 3.2 Perceived innovation

The degree to which an individual is receptive to new technical ideas and eager to experiment with that technology is defined as innovativeness in new technologies. It is a personality trait that motivates customers' initial desire to experiment with new technologies before their actual experience with any particular technology (San Martín & Herrero, 2012). This characteristic makes these innovators an attractive segment for businesses looking to stimulate innovation in technological environments (Ciftci et al., 2021). As members of Generation Z have grown up alongside information technology, they have demonstrated to be highly tech-savvy. As a result, they are more likely to adopt new technological innovations - whether it is for e-commerce transactions or social media consumption (Dimitriou & AbouElgheit, 2019). Kwon et al. (2007) have shown that highly innovative customers create favorable opinions about certain technological advances and are also open to taking risks. These opinions will reflect in their beliefs about the usefulness (Purani et al., 2019). Also, studies (Fagan et al., 2012; Parveen & Sulaiman, 2008) have demonstrated that innovativeness with new technologies positively influences perceived usefulness. Purani et al. (2019) identified

innovativeness positively determines the perceived usefulness in the online purchase context.

It is also worth noting that customers may gain more intrinsic benefits if the new information system is more innovative (Venkatesh et al., 2012), creating trust in its usability. According to previous studies (Cui et al., 2018), consumer innovativeness directly influences trust. Consumers' perceptions of a company's trustworthiness are formed based on their previous experiences; therefore, it is believed that perceived innovation will have an impact on trust (Konuk, 2019). Moreover, An et al. (2022) also identified a positive relation between innovativeness and trust. Thus, this study hypothesizes:

*H3. Innovativeness will have a direct and positive influence on perceived usefulness.*

*H4. Innovativeness will have a direct and positive influence on influence trust.*

### 3.3 Subjective norm

Subjective norm explains the extent to which a customer's behaviour is influenced by the perceptions of peer groups, friends or colleagues, and relatives (Hasbullah et al., 2016). Subjective norms are important for technological acceptance because they help reduce perceived risk (Purani et al., 2019). Generation Z trusts their peer groups (Fontein, 2019). As a result, their loyalty formation is based on peer recommendations (StudentBeans, 2021). In their seminal paper, Davis et al. (1989) reported that people tend to use technology more because of what other people want them to do and because of their own feelings. TAM2 model identifies subjective norms significantly influence perceived usefulness (Venkatesh & Davis, 2000). Studies have further ratified this assumption (Kim et al., 2009; Purani et al., 2019). Türker et al. (2022) identified subjective norm strongly influence perceived usefulness and trust in online context.

Gong et al. (2019) confirm that the subjective norm is also a predictor of trust in the online context. While using technology, people may rely on the opinions of those who are important to them and then build trust beliefs in the system accordingly (Li et al., 2008). Furthermore, previous studies have revealed that subjective norms significantly influence trust (Chaouali et al., 2016; Wu et al., 2008). Thus, this study hypothesizes:

*H5. Subjective norms positively influence perceived usefulness.*

*H6. Subjective norms positively influence trust.*

### 3.4 Trust

Trust is crucial for any transaction involving a buyer-seller relationship, particularly those that contain an element of risk such as interacting with e-commerce websites. Using an online travel website generally requires customers' personal and financial information. Therefore, customers may have concerns about security and privacy level to limit the amount of risk and support their decision to utilize travel websites (Kim et al., 2011). Pavlou (2003) confirms trust significantly influences perceived usefulness in consumer acceptance of e-commerce. Other studies (Alalwan et al., 2018; Aloudat et al., 2014) also discuss and supports trust positively influences the perceived usefulness of the technology.

Online customers remain loyal to the trusted websites. Previous research (Cui et al., 2018; Purani et al., 2019) have

shown that trust positively influences e-loyalty. Particularly the study (Thomas et al., 2018) confirms the influence of trust on e-loyalty in the context of Generation Z. Thus, this study hypothesizes:

*H7. Trust on the website positively influences perceived usefulness.*

*H8. Trust on the website positively impact e-loyalty.*

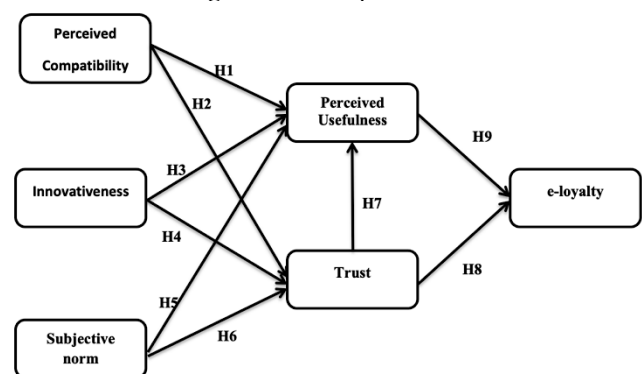
### 3.5 Perceived usefulness

Perceived usefulness could be defined as the benefits achieved via the use of technologies (Davis, 1989). These perceived benefits may relate to how customers perceive usefulness of travel websites to accomplish their tasks, saving them time, effort, and money (Alalwan et al., 2018). Previous literature (Cyr, 2008; Purani et al., 2019) supports existence of a relationship between perceived usefulness and e-loyalty. According to Hsu et al. (2013), perceived usefulness is an important variable in determine the e-loyalty of the customer. The same proposition is a also supported by Chiu et al. (2009). Thus, this study hypothesizes:

*H9. Perceived usefulness of travel website positively influence e-loyalty*

The proposed hypothesized model and hypotheses are shown in Figure 1.

Figure 1: Conceptual model



## 4 RESEARCH METHODOLOGY

### 4.1 Research design and data analysis

The research was conducted between February and April 2022 utilizing a quantitative method. This study adopts a descriptive and causal approach. The reason for applying PLS-SEM in this study is its benefits in studying behavior of humans and its excellent predictive capability when employing reflecting indicators and a wide variety of sample sizes (Hair et al., 2012). An Importance-Performance Analysis (IPMA) was also conducted to recognize the variables that need to be managed to foster e-loyalty among the Generation Z (Buhalis et al., 2020).

### 4.2 Data collection

This research is conducted to understand the online loyalty of a specific generational cohort called Generation Z. Therefore; this research needed respondents who were born in and after 1995. As a result, the study surveyed graduate and postgraduate students in India particularly Odisha because of

their age and better level of education than the general public, students have a significant commercial and influential value, and they are an adequate depiction of virtual consumers (Buhalis et al., 2020). These academic students are considered a major target market for online retailers because of their computer literacy (Buhalis et al., 2020). A paper-based survey based on convenience sampling was conducted to collect the responses. We asked the respondents to consider their most often visited online travel website and then reply based on their last six-month experience with that particular online travel website. Totally, 430 questionnaires were distributed to collect the data. However, of the total questionnaires, a total of 389 valid questionnaires were received and used in this research. In the responses received, 65% were male, and 35% were female, and the response rate was 90.47%. They were all born between 1995 and 2002.

#### 4.3 Variable and measurement

The dependent variable is e-loyalty, and the independent variables are compatibility, innovativeness, subjective norm, perceived usefulness and trust. All the variables are measured using the standard scales available in the literature focusing on the online purchase based five-point Likert scale. The indicators measuring the Perceived usefulness and trust variables were adopted from studies (Cui et al., 2018; Purani et al., 2019). The scales for compatibility, innovativeness, e-loyalty and subjective norm measurement were adopted from previous studies (F Cui et al., 2018; Purani et al., 2019; Vijayasathy, 2004). The construct compatibility and subjective norms were measured using three indicators each. Innovativeness was measured using four indicators. Perceived usefulness and trust had six and four indicators respectively. The dependent variable e-loyalty was measured by three indicators. All the indicators and their adopted sources are shown in Table 1.

Table 1: Scale indicators

Variables	Indicators
Innovativeness (F Cui et al., 2018)	(a) "If I heard about new information technology (IT), I would look for ways to experiment with it". (b) "I Among my peers, I am usually the first to try out new IT". (c) "In general, I like to try out new information technology". (d) "I like to experiment with new information technology".
Perceived Compatibility (Purani et al., 2019)	(a) "Using the Internet to purchase travel products would fit well with the way I like to do things". (b) "Using the Internet to purchase travel products would be coherent with my habits". (c) "Using the Internet to purchase travel product would fit into my lifestyle".
Subjective norm (Purani et al., 2019; Vijayasathy, 2004)	(a) "People whose opinions I value would approve if I buy a lot of things through the Internet". (b) "Among my circle of friends, using the internet to purchase things is very normal". (c) "People who are important to me would agree if I used the Internet to purchase".
Trust (F Cui et al., 2018)	(a) "This travel website is reliable". (b) "This travel website is trustworthy". (c) "This travel website is professional". (d) "There is no need to worry about the products or services on this travel website".
Perceived usefulness (Purani et al., 2019)	(a) "Using this website enables me to accomplish tasks more quickly". (b) "Using this website improves the performance of my tasks". (c) "Using this website saves me money". (d) "Using this website improves my task productivity". (e) "Using this website improves my task quality". (f) "Using this website makes my job easier".
E-loyalty (F Cui et al., 2018)	(a) "This will be my first choice when purchasing tourism products online". (b) "I will continue to purchase products on this website". (c) "I will encourage friends and relatives to book product and services on this website".

#### 4.4 Common method bias

In behavioral research, common method bias is a potential concern.. Therefore, scholars have recommended examining the collected data for any common method variance that may occur as a result of using a single survey method (Ali et al., 2018). Based on the suggestions of Kock & Lynn (2012), the study used the full collinearity VIFs among all the variables in the model to check the common method bias. This study identified that the values were less than 5 indicating there was no serious issue of common method variance (Hair et al., 2011).

## 5 RESULTS

### 5.1 Measurement model

Reliability was measured using the internal consistency reliability and indicator reliability based on composite reliability and indicator outer loading, respectively (Hair et al., 2011). All the values related to the evaluation of reliability were found in the acceptable range. The Cronbach's alpha, the outer loadings and composite reliability values are greater than 0.70 (Hair Jr et al., 2016) (Table 2). These results verify that the measurement model is internally consistent and valid.

Table 2: Construct reliability and validity

Variables	Indicators	Loading	Cronbach's Alpha	CR	AVE
Perceived compatibility	CM1	0.802	0.792	0.878	0.706
	CM2	0.857			
	CM3	0.861			
Innovation	IN1	0.828	0.833	0.888	0.666
	IN2	0.869			
	IN3	0.812			
	IN4	0.752			
Subjective norm	SN1	0.864	0.750	0.858	0.671
	SN2	0.857			
	SN3	0.727			
Trust	TR1	0.847	0.852	0.900	0.694
	TR2	0.816			
	TR3	0.858			
	TR4	0.771			
Perceived Usefulness	PU1	0.793	0.873	0.905	0.613
	PU2	0.795			
	PU3	0.821			
	PU4	0.757			
	PU5	0.773			
	PU6	0.756			
e-loyalty	LY1	0.809	0.806	0.885	0.720
	LY2	0.875			
	LY3	0.860			

Convergent validity was found adequate because Average Variance Extracted (AVE) values were greater than 0.5. This study used Fornell-Larcker criterion to measure construct validity (Fornell & Larcker, 1981). The square roots of the AVE of each construct (diagonal value) were greater than its corresponding correlation coefficients (Table 3), indicating each construct is significantly different from other constructs (Hair et al., 2012). Furthermore, Table 3 also represents discriminant validity based on the result of another criterion called the heterotrait-monotrait (HTMT) ratio of correlations (Henseler et al., 2015). As indicated in Table 3, all the values below the threshold value (less than 0.85) demonstrate that all the constructs are empirically unique and have no discriminant validity issue.

Table 3: Discriminant validity

	CM	TR	IN	LY	PU	SN
Perceived Compatibility	0.841					
Trust	0.502	0.833				
Innovation	0.419	0.601	0.816			
E-loyalty	0.404	0.448	0.572	0.849		
Perceived Usefulness	0.554	0.637	0.692	0.519	0.783	
Subjective Norm	0.354	0.478	0.456	0.323	0.540	0.819

Heterotrait-Monotrait (HTMT)						
Perceived compatibility						
Trust	0.608					
Innovation	0.513	0.698				
E-loyalty	0.499	0.531	0.704			
Perceived Usefulness	0.658	0.735	0.799	0.613		
Subjective Norm	0.460	0.591	0.569	0.411	0.667	

## 5.2 Structural model

This study used the non-parametric procedure bootstrapping to estimate the p-value, path coefficients and t-value for the hypothesized relationship (Hair et al., 2012). PLS-SEM method produces the estimation using sample data that best predict the endogenous construct. As a result, it has no standard goodness-of-fit indices for evaluating the structural model. Therefore, the overall model fit is primarily evaluated using R<sup>2</sup>, Q<sup>2</sup>, and path coefficient values in PLS-SEM models (Ali et al., 2018). Tenenhaus et al. (2005) suggest another operational solution to address the issues by recommending goodness-of-fit (GoF) criteria. This index is meant for validating the PLS model globally. The baseline values of GoF to validate the PLS model are small=0.1, medium=0.25 and large=0.36 (Wetzels et al., 2009). The results of this analysis showed that the GoF was 0.558, which led us to the conclusion that the model is fit (Table 4).

Table 4: R<sup>2</sup>, Q<sup>2</sup> and GoF test

Variables	R <sup>2</sup>	Q <sup>2</sup>
Perceived usefulness	0.622	0.373
Trust	0.468	0.316
E-loyalty	0.293	0.204
GoF	0.558	

Table 4 shows the value of R<sup>2</sup>. It is a measure of the model's predictive accuracy, which varies between 0 and 1. Perceived compatibility, subjective norm and innovativeness explain 46.8% of trust, whereas perceived compatibility; subjective norm, innovativeness and trust explain 62.2% of perceived usefulness. Trust and perceived usefulness predicts 29.3% of e-loyalty. In all the case of endogenous latent variables, the value of R<sup>2</sup> were above the acceptable level proposed by Hair et al. (2015).

Additionally, the Cross-validated redundancy (Q<sup>2</sup>) method was used which measures the predictive relevance of a structural model (Hair et al., 2014). The study estimated the Q<sup>2</sup> value for each construct using the sample reuse technique of blindfolding. It is an evaluation criterion for the PLS path model's cross-validated predictive significance (Faizan Ali et al., 2011). As shown in Table 4, the value of Q<sup>2</sup> for perceived usefulness, trust and e-loyalty are 0.373, 0.316 and 0.204, respectively indicating the exogenous constructs have predictive relevance since the values are greater than 0.

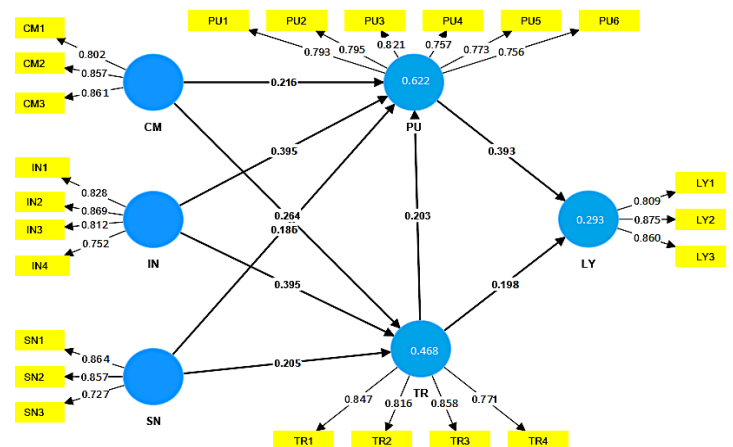
The result of the structural model and hypotheses are presented in Table 5 and Figure 2. All nine hypotheses are supported regarding the causal relationship since the p-value is significant. Perceived compatibility, subjective norm and innovativeness significantly influence trust. Furthermore, the study identified Perceived compatibility, subjective norm, innovativeness, and trust significantly influenced perceived usefulness. The result also revealed that perceived usefulness and trust are significant predictors of e-loyalty. For all the causal relationships, the magnitude effect is strong. Thus, the exogenous latent construct contributes significantly to explaining the endogenous latent construct.

Table 5: Path coefficients and p-values

Hypothesis	Path	Path (β)	t-value	P-values	Decision
H1	Perceived compatibility -> Trust	0.264	5.663	0.000	Supported
H2	Perceived compatibility -> Perceived usefulness	0.216	4.183	0.000	Supported
H3	Innovation -> Trust	0.395	8.888	0.000	Supported
H4	Innovation -> Perceived usefulness	0.395	8.478	0.000	Supported
H5	Subjective norm -> Trust	0.205	4.686	0.000	Supported
H6	Subjective norm -> Perceived usefulness	0.186	4.299	0.000	Supported
H7	Trust -> Perceived usefulness	0.203	3.903	0.000	Supported
H8	Trust -> E-loyalty	0.198	3.365	0.000	Supported
H9	Perceived usefulness -> E-loyalty	0.393	6.377	0.000	Supported

\*P<0.05

Figure 2: Structural model

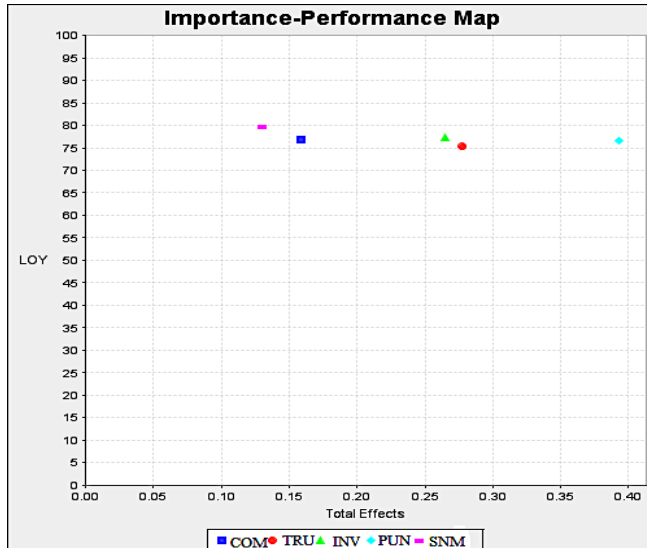


## 5.3 Importance-performance analysis

Additionally, the study conducted Importance-Performance Analysis (IPMA). It is an easily applied technique developed by Martilla & James (1977) to measure the importance and performance of the attributes that can yield useful insight for the firm regarding the aspects which needs more attention. It identifies the relative importance of predecessors in explaining the target construct based on the strong total effect to draw conclusions. In addition, it also accounts for the performance of the each constructs based on the their average scores (Ringle & Sarstedt, 2016). According to Streukens et al. (2017), PLS-SEM IPMA has several advantages over traditional IPMA. PLS-SEM is a critical analytical tool for determining the significance score because it can examine a complex grid of relationships that connects various drivers to a single construct. Second, PLS-SEM allows for the inclusion of latent constructs in the IPMA analysis. Figure 3 shows the IPMA result for the dependent variable of e-loyalty. The IPMA result estimated that in order to predict e-loyalty,

perceived usefulness (0.39) has the highest importance, followed by trust (0.28) and innovation with new technologies (0.27). All three variables are close to the maximum productivity line and necessitate immediate attention in terms of resources (Bacon, 2003).

Figure 3: Importance-performance map



## 6 DISCUSSION

In this research, we validate the influence of personal characteristics and social influence on the e-loyalty of Generation Z customers. Many studies have been conducted to understand the factors that influence online loyalty formation. However, in the context of Generation Z, the extant literature has no evidence highlighting the importance of personal characteristics and social influence in e-loyalty formation. Tourism scholars have argued that travel behavior varies across generations, emphasizing the importance of identifying the specific expectations of each generation (Gardiner et al., 2014). Compared to the previous generation, the change in attitudes and behaviors among Generation Z is a concern for marketers due to their differences from previous generations. Most importantly, it is a topic of high priority for marketers to foster loyalty among Generation Z (Dimitriou & AbouElgheit, 2019). Interestingly, it is challenging for all marketers to identify the factors that could help capture and retain their loyalty (Ayuni, 2019; Papanas & Spyridou, 2020; Samitas et al., 2020). As a result, for the advancement of theory, it is critical to identify the antecedent elements that are relevant to Generation Z. Many studies have sought the impact of many antecedent factors such as website design and eWOM (Buhalis et al., 2020), website personalization, website usability and website content (Martínez-González & Álvarez-Albelo, 2021), e-service quality and online customer value (Ayuni, 2019), customer experience (Fernandes & Radebe, 2018) on e-loyalty. Though these elements may have an impact on the loyalty formation process of Generation Z, personality characteristics and social influence have a significant impact in determining their e-loyalty (Purani et al., 2019).

The study identified that innovativeness is an important antecedent of perceived usefulness and trust among the Gen Z. It has been confirmed that personal innovativeness has a significant relationship with perceived usefulness and trust. This is similar to Priporas et al. (2017), who identified that Generation Z are more focused on new innovation in human-computer interactions in an e-retail settings. Gen Z is the generation that drives innovation further upward by utilizing emergent technology, hyper-connectivity, and cooperation (Morgan, 2016). According to Wood (2013), innovation is one of the important trends in Generation z, and they have more choices in the marketplace than their predecessors. This generations' willingness to spend money on technological and design-based innovation is high. Both Generations Z and Y often share many characteristics. Previous research (Purani et al., 2019) on Generation Y also identified innovation with new technologies is a significant factor for e-loyalty. Additionally, the study found out that the perceived level of technology compatibility influences perceived usefulness and trust. While booking tourism products and services online is gaining importance in India, some unexplored market segments are still yet to be served (Behera & Dash, 2019). Technology compatibility and innovativeness are critical in the context of e-retailing (Purani et al., 2019). Compatibility evaluates how well an existing technology is consistent with consumption practices that are used to accomplish consumption goals (Lim et al., 2022). Hence compatibility is associated with an individual's values, past experience, lifestyle and needs (Rogers, 2010).

Moreover, studies already support the influence of perceived compatibility on perceived usefulness and trust which in turn influences e-loyalty in the context of tourism and hospitality (Amaro & Duarte, 2015; A B Ozturk et al., 2016; Wang et al., 2016). Furthermore, a review conducted by Morosan & Bowen, (2018) reports that compatibility is a crucial antecedent of e-loyalty. For Generation Z, it is usual to buy travel and tourism products from online websites since they are "digital natives," having grown up in a digitized world where they perform most of their tasks on a digital device (Hameed & Mathur, 2020). According to Fernandes & Radebe (2018), they expect a digital platform to be available for everything they do, whether buying food online, playing games, learning, reading, or watching television. Interestingly, when purchasing a tourist product, more than 95% of the younger generation use the Internet (Martínez-González & Álvarez-Albelo, 2021). It indicates that booking tourism products online is compatible with the existing value, lifestyle, and needs of Generation Z. As a result, the study emphasizes the need to enable compatibility to attain higher levels of e-loyalty.

Subjective norms are found to impact both perceived usefulness and trust. Subjective norms are especially important because Generation Z highly trusts peer networks and their perspectives (Silva et al., 2017). They are the earliest generation to have grown up in a digital era of advanced technological developments, making them one of the most active social media platform users, frequently exchanging information and conversing with their peers online (Kitchen & Proctor, 2015). According to Broadbent et al. (2017), "For all the rapid pace of change, young people overwhelmingly say that their values were influenced by traditional sources – parents (89%) followed by friends



(78%) and teachers (70%)" (p. 10). Therefore, peer approval is extremely essential to them because they need to feel like they belong somewhere. Thus, when it comes to the behavioral responses that result in loyalty, they are heavily influenced by peer recommendations. Previous studies also emphasize that subjective norms significantly influence the behavior of Generation Z (Goh & Jie, 2019; Goh & Lee, 2018; Kamenidou et al., 2019; Korol & Spyridou, 2020; Nuryyev et al., 2021)

## 7 CONCLUSIONS AND IMPLICATIONS

This paper responds to an important concern of academicians regarding the process by which Generation Z forms e-loyalty, particularly to online travel websites. In this study, we address two crucial characteristics (personal characteristics and social influence) and their influence on the e-loyalty behaviour of the Generation Z travellers. Previously, authors (Purani et al., 2019) have considered these variables are important for e-loyalty formation and have not been examined together in the context of travel and tourism particularly Generation Z. From the best of our knowledge, this is the first model in tourism which considers both social influence and personal characteristics and their influence on e-loyalty.

The most significant contribution of the study is that it considers Generation Z, a generation that will shape the future economy of the world (Broadbent et al., 2017; Spyridou, Polyzos, & Samitas, 2023). This is necessary because of the commercial and financial benefits that e-loyalty generates, especially with respect to Generation Z, a digital sector with significant purchasing power and influence. Studying e-loyalty of young consumers is also gaining momentum because of the insecurity associated with purchasing tourism products online due to their intangible nature and the insecurity of e-commerce itself which hampers its growth (Buhalis et al., 2020).

From the theoretical perspective, a model describing the e-loyalty formation of Generation Z has been developed and validated using SEM. The results were statistically significant thus contributing to theoretical development of the sparsely studied concept of e-loyalty among Gen Z travellers. Further, the proven rigour of the SEM allowed us to generate a causal model which significantly predicts the antecedents of e-loyalty among Gen Z in a tourism context. Other authors have successfully employed this methodology in connection to the variables used (Buhalis et al., 2020).

This study has several theoretical contributions. First, Generation Z is increasingly becoming the dominant demographic in the market, and it is essential to get the attention of this group by appealing to the special characteristics they exhibit online. In this light, the research offers some guidance on how to develop an e-loyalty that will appeal to members of Generation Z. Second, most studies of the studies have been conducted based on the website evaluation factors undermining the influence of personal characteristics and social influence. Therefore, the study theoretically contributes to the literature by extending the understanding of e-loyalty concept considering the perceived compatibility, innovativeness and subjective norm in the context of Generation Z. Third, the study highlights

perceived usefulness and trust are the two measure determinates of e-loyalty for Generation Z. This would assist the scholar to broaden the concept in terms of e-loyalty and compare and contrast the findings of this study with other generational cohorts. Four, the study contributes to the literature by explaining the factors creating the usefulness of the website and building trust.

The study has practical implications for tourism companies. From the practitioner's point of view, understanding the e-loyalty of Generation Z is an important aspect for tourism companies helping them formulate and implement successful marketing initiatives. The model developed in the study will be a valuable tool for managers. It allows them to clearly identify the target population based on personal characteristics and the social influence of a specific generational cohort with distinct traits. Additionally, Due to its predictability and generalizability practitioners can find this study useful for market segmentation and planning operational strategies.

### 7.1 Limitations and future suggestions

Like other studies, it has its own set of limitations and suggests areas for future investigation. Loyalty is difficult to measure since several factors affect loyalty formation. This study tries to understand loyalty formation considering only some personality traits and subjective norms. There are other personality characteristics such as perceived behavioral control, risk aversion, need for cognition, etc. They influence e-loyalty and the adoption of electronic commerce technologies. It could be interesting to probe how these factors influence the loyalty of Generation Z. A cross-cultural study can also be conducted to understand if Generation Z consumer behaviour varies with differing level of technological advancement. Furthermore, future studies might look at gender differences in the process of e-loyalty formation among Generation Z.

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# Dark satisfaction in Guanajuato's Mummies Museum visitors

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## Abstract:

**Purpose:** The purpose of this study is to explain the determinants of the degree of visit satisfaction to the Guanajuato Mummies Museum. The study contributes to the literature related to perceptions and attitudes of museum visitors, by identifying what factors explain the satisfaction with the visit; as to the best of our knowledge, no similar investigation has been carried out yet.

**Methods:** A survey was used to collect the data (n=392) from national and foreign visitors of the said museum, containing sociodemographic variables, opinions and feelings of the visitors and information about the visit. Data analysis was conducted with an ordered Logit model.

**Results:** Findings indicate that opinions about the activity of the museum, the guided tour and the rest area are the most significant determinants of visitors' satisfaction, while the library and facilities for the disabled are moderately important. Feelings of enjoyment, tiredness or boredom marginally affect visitors' satisfaction.

**Implications:** Knowledge of the satisfaction factors can guide marketing strategies and direct the training of personnel as recommended by ICOM (International Council of Museums) to continue contributing to the improvement of services offered, increasing the levels of satisfaction, and leading to repeat visits.

**Keywords:** Museum, Guanajuato, Dark tourism, Visitors' satisfaction, logit model

**JEL Classification:** L83, N36, C48

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## 1 INTRODUCTION

Cultural tourism has established itself as a desirable option for tourists. Indeed, heritage is an essential issue of this type of tourism because it includes past and current expressions of people and society. In this market, museums stand out as a sector where competition is complicated and difficult to detect (Răvar & Iorgulescu, 2013). Moreover, value is added by museums to the cities (Montella, 2014) and acts as promoters as well (Reussner, 2003), and they are a fundamental part of protecting cultural heritage (Ertürk,

2006). Also, destinations found museums as significant tourist attractions (Rico Mansard, 2008) as promoters of tourism, both general and cultural (Korstanje, 2016). For example, its impact on the growth of the tourism segment in archaeological zones (Guccio et al., 2018), economic growth (Brida et al., 2014), visitors and the length of their stays increases at the destination with visit museum (Khawas & Kulshreshtha, 2016; Das et al., 2022).

This research analyzes the Museo de las Momias in Guanajuato (MUMOG). This museum preserves the most extensive collection of natural mummies in the world. In addition, it has remarkable pieces, such as a prenatal and the



tiest mummy in the world. Through the years, the museum has been a symbol of Guanajuato in Mexico, which has 194,000 habitants (INEGI, 2021). According to UNESCO, the city of Guanajuato is of World heritage, and the museum is its main attraction and related to the tourist destination. It has two venues, the old one, Santa Paula Cemetery in Guanajuato's capital, and the modern one, Parador Sangre de Cristo, in a city nearby, Silao. The number of visitors per year is approximately 700,000 (Presidencia Municipal, 2020).

This museum is part of dark tourism, a concept created in the 90s by Foley & Lennon (1996), and it strongly relates to the attraction of death (Stone, 2006). They are several types, such as exhibitions, prisons, places of conflict and disasters, camps of genocides, and cemeteries. Necro tourism, morbid tourism, thana tourism, negative, tragic, and atrocity are dark tourism types (Millán et al., 2021). It involves death spaces and includes cemeteries, corpses, and battle sites (Young & Light, 2016). Indeed, people like to see graves in dark tourism because they enjoy it. Dark tourism is associated with tragedies, pain, and legacy in some way (Stone, 2006; Séraphin & Jarraud, 2022).

Yuill (2004) described dark tourism as based on curiosity about death. In this sense, dark tourism produces an experience that involves subjective judgment but is related to death and disaster (Bowman & Pezzullo, 2009). In Mexico, there is the worship of death and a Death Day to remember family deaths. One of the most important symbols of Mexicans is the "Catrina," a fancy skeleton. So, an exhibition of mummified bodies is thrilling and attractive to the public. Regarding the attendees, it can be considered one of the most visited museums in Mexico (SIC, 2021). It has been studied according to the relationship with tourism destination (Gonzalez Rosas et al., 2020), the mummies' commercial exploitation (Caraballo Perichi, 2005; Margarida Anjo et al., 2021), and the motivation within the museum related to a collective drive rather than a personal conscious decision (Guerrero Rodríguez et al., 2018).

Indeed, as it is necessary to continue studying the museum, this research wants to analyze satisfaction at the MUMOG. This article aims to study visitors' satisfaction and to evaluate the exhibit and its characteristics. The results may vary because of dark tourism's features. Experience, satisfaction, and service quality with the visit are fundamental aspects of tourism (Pine & Gilmore, 1998). There is also a lack of research regarding emotional experience in museums (Selçuk & Kozak, 2020; Mugobi & Mlozi, 2021). In this sense, it is crucial to determine if MUMOG visitors experience satisfaction during their visit. Because of that, the study had the following research question: What is the level of satisfaction in the visit to the MUMOG considering socio-demographic variables, opinions, and sensations?

This research analyzes visitors' satisfaction with a museum in the dark tourism segment. According to this, this study helps to understand the nature of dark tourism Mexican context. Also, increasing the satisfaction of museum visitors is always a desire, and one way of achieving this is to know the level people still need. Satisfaction becomes more challenging to determine when it is about dark tourism.

In Mexico, researchers have yet to study dark tourism. However, some studies have pointed out the importance of determining this kind of tourist's motivation, satisfaction, experience, and behavior (Ashworth & Isaac, 2015), and

Guanajuato's MUMOG cannot be an exception. Therefore, this research aims to analyze the determinants of satisfaction of the visit to the Guanajuato Mummies Museum to identify the needs and experience of dark tourism. Furthermore, the study analyzes socio-demographic variables, opinions, and sensations. Finally, this study analyzes the results regarding the degree of visitor satisfaction and the generating factors.

Indeed, increasing visitors' satisfaction with museums and other tourist facilities is a fundamental aspect of their service. Therefore, museums want to enhance their brand value by improving the tourist experience. Besides, museums are essential resources for tourist destinations, growth and development of museums and their outcomes are critical issues for achieving them.

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## 2 LITERATURE REVIEW

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### 2.1 Museums' experience and satisfaction

During museum visits, experience and satisfaction can occur. It is a cognitive and affective process, which makes it possible to determine the heterogeneity of the visitors (Ruiz-Alba et al., 2019). Object, cognitive, introspective, and social are types of satisfaction experiences. The level of satisfaction is variable, and it is related to the characteristics of the museum itself, the type of exhibits, and the visitors (Pekarik et al., 1999; Sinclair-Maragh & Simpson, 2021). Quality of the service, which includes the optimal parameters and conditions that visitors are looking for and their relationship to the experience, influences satisfaction.

Furthermore, experience, quality of service, and involvement are generators of museum satisfaction (Forgas-Coll et al., 2017). Besides, high satisfaction levels relate to the museum experience, return, and intention to recommend it. Therefore, increasing visitors' satisfaction levels should be a marketing strategy (Harrison & Shaw, 2004; Samy, 2016; Yağmur, & Aksu, 2022). Satisfaction is a "group of sensations or feelings generated by both cognitive and emotional aspects of goods and services. As well as the accumulated evaluation of different components and characteristics" (Brida et al., 2012, 2013).

As can be seen, satisfaction and experience are multidimensional and complex; besides, both can contribute to the benefit of the enclosure; for example, in Italy, museum experience dimensions were related to aesthetics, escapism, and education. These dimensions positively affected satisfaction and encouraged the promotion of the museum word of mouth behavioral intentions (Vesci et al., 2021). On the other hand, socio-demographic variables and the type of satisfaction of museum visitors were studied with ambivalent results. For example, with positive emotions, the level of attraction and perception of the museum's uniqueness is higher (Del Chiappa et al., 2014). Also, Del Chiappa et al. (2013) found that socio-demographics and length of the visit influence satisfaction.

However, attendees' revisit intention to the museum is related to quality, experience, perceived value, and money rather than satisfaction (Hume, 2011; Christou et al., 2021). There is also evidence of the perceived value of introducing high technology in services as a critical element in satisfaction, as happened in the Shaanxi Museum of History in Xi'an, China (Chen & Ryan, 2020). In addition, the Cham

Museum in Danang, Vietnam, found a positive relationship between satisfaction with the conative (visitor's desire to make recommendations to other people), interpretation, and displays (Trinh & Ryan, 2013). In other words, satisfaction provokes reactions such as the generation of intentions or as a mediator for the image, experience, quality, and consistency in the visit to a museum (Han & Hyun, 2017).

As mentioned, the satisfaction of museum visitors is a complex process since it involves several factors, such as policies, quality of service, and expectations, among other aspects. In this regard, the need to analyze it through a system of dynamics to measure long-term satisfaction and the quality of service, facilities, and even the number of visitors (Yao & Hsiao, 2012). In this sense, there are antecedents of the relationship of satisfaction in museums with performance and services (Orea-Giner et al., 2021), circulation and design of the space (Faerber et al., 2021), collection, perimeter services, and environmental factors (Passebois & Aurier, 2004), supplementary services (Brida et al., 2012), the need to measure the quality of the service (Mey & Mohamed, 2010) and as a measure to improve service (Maher et al., 2011) or quality dimensions related to the degree of satisfaction and future behavior (Daskalaki, et al., 2020).

With the massive use of mobile devices, a new market for museum services has been added and analyzed about satisfaction. In this regard, museum technology is an innovation factor related to the quality and satisfaction of visitors (Hume, 2015). For example, the so-called self-service technology has strongly impacted satisfaction in the visiting experience (Jarrier & Bourgeon-Renault, 2019), while usefulness, enjoyment, and interactivity positively affect satisfaction when using mobile guide systems (Kang et al., 2018).

Indeed, there are benefits to achieving satisfaction; for example, the perception of having a positive visit can encourage the publication of comments online, which contributes to the promotion of the museum, and it can be a pole of attraction for new visitors (Antón et al., 2019). Also, there are antecedents that satisfaction, interpretation, and displays are somehow related (Trinh & Ryan, 2013). In general, museums keep the latent need to maintain audiences and seek to repeat visits.

Therefore, analyzing MUMOG's satisfaction and experience will help to understand why it is such a visited museum. The research has the following questions: what are visitors' needs and motives? Moreover, what kind of experience provokes visitors?

## 2.2 Dark tourism experience

To understand dark tourism, motivations, experiences, the relationship between visitors and identity, and new approaches to the consumption of dark tourism (Light, 2017). Stone (2006) defined "dark tourism as the act of travel to sites associated with death, suffering and the seemingly macabre" (p. 146). Due to dark tourism features, its experience is quite different, and it has unique types of experiences towards the place and a fascination with death. What some people look for in other types of tourism, more oriented to leisure and pleasure and with a feeling or having a good experience, will not apply to dark tourism related to suffering, death, and disaster (Cheal & Griffin, 2013). Dark tourists go to those destinations looking for social meaning, remembrance,

status, or integration with death to provoke emotions (Sharpley, 2009). Also, there is some morbid curiosity and voyeurism (Cheal & Griffin, 2013). Dark tourism is not only about death, but also is based on different types of experiences such as narrative, educational, entertainment, memorialization, moral instruction, and "memento mori" (remember that will die) (Stone, 2012).

Consumption of dark sites is a form of acceptance of contemporary society the death (socio-cultural perspective) (P. Stone & Sharpley, 2008). Dark tourism' experience literature is diverse and has been studied in several ways, according to service strategies to enable tourists' intention to go to macabre tourism sites (Wu & Cheng, 2018), how tourists' emotional reactions influenced experience more than cognition and learning do (Yan et al., 2016); the influence of negative emotions and geopolitics in a Prison Museum in China (Weaver et al., 2017); detection of residents' experiences more negative than positive in Canterbury earthquake place in New Zealand (Jordan & Prayag, 2021) and the presence of ethical issues in the museum narrative in Auschwitz-Birkenau State Museum because of the guided tour in such a delicate site (Griffiths, 2019).

As mentioned, dark experience is varied and can be complex and dual; it is mixed with emotion (fear, shock, depression, and appreciation, as unfavorable) and spiritual and sacredness feelings (positive experience as an appreciation), as detected in Memorial Hall of the Victims in Nanjing Massacre. Besides, negative emotions can be related to learning (Zheng et al., 2020). On the other hand, it can develop positive emotions, empathy, and geopolitical disposition, and it is an excellent tool for education, as detected in war museums in China (Chang, 2017). In the case of warfare, in battlefield tours, visitors experience deep and meaningful feelings as changing experiences (Dunkley et al., 2011), and visiting slave castles in Ghana reflects motives and perception of grief and painful experience (Mowatt & Chancellor, 2011). Besides, there are different types of dark experiences, they can be catalogued from darkest to lightest, meaning that some places are darker than others, and that can provoke different types of experiences, as Stone has proposed (P. R. Stone, 2006).

## 2.3 Dark motivation

Moreover, according to (Light, 2017), it is vital to analyze the nature of demand for dark places focusing experiences of visitors and motivation. To understand why people like to have those experiences, what motives make people visit those places? Reference to that literature shows different motives; for instance, interest in understanding what happened at the dark site; in the earthquake-ravaged county town of Beichuan in China, it was analyzed on-site experience, destination image, and behavioral intention (Iliev, 2021) and how experience and behavioral intention were related to image educational and memorial place and much less with fear or leisure (Qian et al., 2021). Also, there is evidence that emotional engagement impels the visit of these sites and generates meaning, as found in three USA dark sites, Ground Zero, Gettysburg, and Ellis Island (Sigala & Steriopoulos, 2021). Further, motives and emotions can differ depending on the circumstances. There is no general type of motivation; for example, Tuol Sleng Genocide Museum in Phnom Penh, Cambodia, found that visitors' motivation was remembrance,



worth, learning, understanding, respect, and a must. In the meantime, emotions and shock, sadness, horror, and depression are related somehow (Isaac & Çakmak, 2016); in the Gallipoli battle in Turkey, Australians who lost 8000 lives in the war, visited the site for different reasons such as national sentiment and personal feelings (Cheal & Griffin, 2013). Similarly, as found in a Cambodian study where visitors experienced and demonstrated sympathy for the victims of the genocidal past and learned about it (Hughes, 2008).

On the contrary, the visitors to the grave of Jean-Paul Satre and Simone de Beauvoir in Paris were motivated by a desire for closeness, respect, and influence of the writers (Brown, 2016); while black metal music fans' motivation for dark tourism has been associate to a desire to compare natural and imagined landscapes in dark metal festivals in simulation and emotional contagion (Podoshen, 2013).

In this sense, an analysis of the mummies collection in the Capuchin Catacombs in Palermo, Sicily, found where they thought of them as representatives of the region's culture (Polzer, 2019). Recently, the experience and terms of "an embodiment" were analyzed, which is the connection between body and feeling and how the macabre experience affects the visitors' sensory expressions and images published at TripAdvisor of the Chernobyl zone. In this case, evaluating the darkness of photos and dark was related to fear, sorrow, shock, appreciation, and depression (Sun & Lv, 2021).

The process of visiting a dark site, according to Farmaki (2013), has two poles: pull (site characteristics, infrastructure, facilities, accessibility) that create a projected image, and push factors (motives and needs) that develop a perceived image (p.288). These can be factors that may impact dark tourism demand. For example, drivers and critical motivators for visiting two dark heritage sites in Cyprus were education, remembrance, and reinforcement of national identity for locals. On the other hand, dark visitors were mainly coincidental and novelty (Farmaki, 2013). Moreover, research on dark tourism has shifted from observing emotion, motivation, and experience to behavior changes that include: intentional amnesia, displacement, physical intervention, repetition and reinforcement, revenge, contrition, and reconciliation (Ashworth & Isaac, 2015).

#### 2.4 Dark tourism satisfaction

In dark tourism, satisfaction also has its peculiarities due to its nature—for example, death consumption, awe, and frightening emotions related positively. Also, authenticity is essential to experience (Wang et al., 2021). Consumption of death requires other types of satisfiers. Indeed, dark tourists are distinctive, and their value perception and motivation rely on "feelings of grief, pain, suffering, and brutality of the past" (Sharma & Nayak, 2019, pp 2).

In this sense, literature related to tourists' values psychosociological (emotional, social, and novelty) and traditional paradigm (functional and money) significantly contributes to direct and indirect loyalty intentions and dark satisfaction in India (Sharma & Nayak, 2019). Also, tourist satisfaction and the personal interpretation of the dark site related to their beliefs in disaster memorials as detected in China. It relates to loyalty (Wang et al., 2021), motivations, experience, and post-behavioral intention (Chanuanthong & Batra, 2017).

Also, evidence of the impact on the quality of the tourist experience is not related to behavioral intention. At the same time, destination image, perceived value, and satisfaction positively affect behavioral intention. Satisfaction is the most important antecedent for behavioral intention (Ghorbanzadeh et al., 2021). In terms of macabre tourism, awe is essential for satisfaction. Satisfaction enhances the intention of revisiting, an aspect that museums always desire because they always need more visitors. Dark sites should vary and utilize a variety of means, to enhance perceptions, especially fear (Wang et al., 2021) that can contribute to satisfaction.

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### 3 METHODS

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The study employed a descriptive, explanatory, non-experimental, and transversal type with a quantitative method involving a questionnaire for domestic and foreign attendees. The instrument was administrated face-to-face at the MUMOG in Spanish by a group of experts.

#### 3.1 Questionnaire

The questionnaire consisted of three sections. It was adapted to Mexico from a version used in Colombian museums (Autor 2 et al., 2012 and 2013). In the first section, information on the visit, previous visits to the MUMOG, museums previously visited, characteristics of the visiting group, reasons for visiting the museum, opinion on aspects and services, feelings of the visit to the museum, intention to visit other museums, degree of satisfaction with the visit, probability of recommending the museum and probability of return visit were collected—responses on opinions and feelings organized according to a five-point Likert scale.

The second section contained characteristics of the trip to Guanajuato, including the intention to visit the museum, the main reason for visiting Guanajuato, accommodation, daily expenses, means of transportation, probability of returning to Guanajuato, and recommendation as a tourist destination.

The last section included information on the visitor's socio-demographic profile (gender, age, educational level, marital status, occupation, and income level).

#### 3.2 Data collection

The museum's number of visitors per year is approximately 700,000 (Presidencia Municipal, 2020). In May 2017, a pilot survey was administered at MUMOG employing random sampling. Appropriate adjustments were made to the questionnaire. From July 14 to 26, 2017, 425 surveys were obtained, of which 392 usable surveys were selected.

Data via random sampling was used, a group of pollsters was trained, and a face-to-face survey was carried out. The selection strategy was to propose the filling out of the questionnaire to random people upon leaving the MUMOG, considering as a requirement that they be over 16 years of age. Another of the selection requirements consisted of the fact that the visitors could read and communicate in written form in Spanish. The study did not consider other factors.

#### 3.3 Data analysis

The descriptive statistics analysis of the visitors to the museum is in Table 1. Note that three quarters had done previous visits to the MUMOG, visitors are domestic, half of

the visitors within 25 to 45 years and had an educational level of undergraduate and graduate. Regarding occupation, almost half of the visitors are employees, and one quarter is students. The majority visited the museum with a couple or family.

Table 1: Sample

Variable	No.:% Of total	Variable	No.:% Of total
Gender		Education	
Men	208; 53%	Specialization	31; 8%
Women	184; 47%		
Age		Undergraduate	170; 44%
< 20	50; 13%	Graduate	50; 13%
20-29	155; 40%	High School	70; 18%
30-39	85; 22%	Elementary	8; 2%
40-49	55; 14%	Middle School	24; 6%
50-59	31; 8%	No title	4; 1%
≥ 60	16; 4%	Technical	35; 9%
Activity		Country	
Independent job	74; 19%	Mexico	353; 90%
Employee	157; 40%	United States	20; 5%
Student	102; 26%	Colombia	8; 2%
Occasional Job	12; 3%	Others	12; 3%
Home	24; 6%	Former visits	
Unemployed	4; 1%	One time	145; 37%
Retired	12; 3%	Two times	86; 22%
Other	8; 2%	Three or more times	63; 16%
Companion		Never	98; 25%
Alone	27; 7%	Last year museums	
Couple	55; 14%	None	51; 13%
Family	81; 21%	1-5	267; 69%
Other relatives	127; 33%	> 5	73; 19%
Friends	85; 22%		
Group	16; 4%		

Source: own elaboration

Table 2 shows the variables obtained from the questionnaire and each item's scales. Note that scales may vary according to the item. Different variables are introduced, in line with the ones observed in the literature, such as profile, visit, trip, services, feelings, and sensations during the visit.

Considering the visitors' opinions on services used in the museum, Table 3 presents descriptive indicators of central tendency and variation; the highest scale is very much (5), much (4), indifferent (3), bad (2), very bad (1) as the lowest. The highest average is for the treatment received by staff, and the lowest is for the documentation center or library (Table 3). The average for all factors is near the media, and they consider indifferent opinions with approaching a good evaluation slightly. However, the bathrooms and the documentation center/library fell into the unsatisfactory category. Regarding feelings and sensations experienced during the visit to MUMOG are taken into account, Table 4 presents the corresponding descriptive statistics.

Concerning the dimension of sensations and feelings of the museum, the scale is much (5), quite (4), indifferent (3), little (2), and nothing (1) as the lowest. Half the questions are assessed in reverse since they present a negative factor. As can be seen in Table 3, the highest score is having learned something and having felt comfortable and satisfied. Also, according to data, having lost or disoriented and having the feeling of wasting time obtained the lowest rate, which is a positive evaluation for the museum; people did not feel lost or wasting their time at the MUMOG.

Table 2: Description of variables

Variables	Definition
<b>Visitant profile</b>	
[Gender]	Men/ Women
[Age]	< 20/ 20-39/ 30-39/ 40-49/ 50-59/ ≥ 60
[Education]	No title/Elementary/MS/HS/Undergraduate/Technical/Specialization/Graduate
[Marital status]	Single/Married; free union/Separated; divorced/Widow;Widower
[Activity]	Independent job/Employee/Student/Occasional Job/Home/Unemployed/Retired/Other
[Income]	≤ \$2,401/\$2,402 – \$4,802/\$4,803 – \$7,203/\$7,204 – \$12,006/\$12,006 – \$24,012/ \$24,012 – \$36,018/\$36,018 – \$48,024/> \$48,024 (monthly income, Mexican Pesos)
[Country]	Country of residency of the respondent
<b>Information about the Museum Visit</b>	
[Former visits]	One time/ Two times/ Three or more times/ Never
[Last year museums]	None/ 1-5/ >5
[Intention]	Yes/No
[Transportation]	Subway/Public Bus/Taxi/ Bus/private transportation/Car/On foot/Other
[Difficulty]	No difficulty/Lack of signal/Signaling to be corrected/another type of difficulty
[Purchases done]	No/Yes
[Recommendation]	Very improbable/Improbable/Probable/Very probable/Do not know
[Repeat visit]	Very improbable/Improbable/Probable/Very probable/Do not know
[Companion]	Alone/Couple/Family/Other relatives/Friends/Group
[Mummies visit]	Yes/No
[Store visit]	Yes/No
[Satisfied]	Very unsatisfied/Unsatisfied/Satisfied/Very satisfied/Do not know
<b>Traveling Information</b>	
[Guanajuato Recommendation]	Very improbable/Improbable/Probable/Very Probable/Do not know
[Coming Back Guanajuato]	Very improbable/Improbable/Probable/Very Probable/Do not know
<b>Opinions of services used in the museum</b>	
[Disabled Facilities]	Very bad/Bad/Indifferent/Good/Very good
[Library]	Very bad/Bad/Indifferent/Good/Very good
[Guided Visit]	Very bad/Bad/Indifferent/Good/Very good
[Rest zones/Restrooms]	Very bad/Bad/Indifferent/Good/Very good
[Museum Activities]	Very bad/Bad/Indifferent/Good/Very good
<b>Feelings/sensations experimented on during the visit</b>	
[Tired Uncomfortable]	Nothing/Little/Indifferent/Quite/Very Much
[Lost track of time]	Nothing/Little/Indifferent/Quite/Very Much
[Bored Lethargic]	Nothing/Little/Indifferent/Quite/Very Much
[Learned something new]	Nothing/Little/Indifferent/Quite/Very Much
[Losing time]	Nothing/Little/Indifferent/Quite/Very Much
[Enjoyment Serenity Happiness]	Nothing/Little/Indifferent/Quite/Very Much

Source: own elaboration

Note: MS=Middle School; HS=High School

Table 3: Opinions on services of the MUMOG (mean and standard deviation)

Item	Media	Desv. St.
Signaling inside the museum	3.839	1.086
Explanations and information at the rooms	3.936	1.060
Treatment by staff	3.974	1.115
Access and facilities for disabled	3.579	1.450
Received treatment at the Ticket Office	3.832	1.102
Documentation Center/Library	2.839	1.801
The guided visit provided by the museum	3.582	1.455
Rest zones/Restrooms	2.855	1.661
Museum activities	3.140	1.630

Source: own elaboration.

Likert scale from 1 (Very bad) to 5 (Very good)

Table 4: Sensations of the visit to the MUMOG (mean and standard deviation)

Item	Media	Desv. St.
You had lost or disoriented	1.485	0.822
Have you felt tired or uncomfortable	1.531	0.875
Have you lost the sense of time	1.689	0.975
You felt bored or lethargic	1.584	0.940
Has learned something new	3.612	1.227
Has felt guided or directed	3.194	1.306
You have felt comfortable and satisfied	3.676	1.096
Has been amazed by something	3.744	1.244
You have felt stressed or nervous	1.862	1.204
You had the feeling that you were wasting your time	1.485	0.822
You have experienced feelings of enjoyment, serenity, and happiness	1.531	0.875
Has had fun	1.689	0.975

Source: own elaboration.

Likert scale from 1 (Nothing) to 5 (Much)

This study introduced an Ordered Logit model to explain the determinants of the degree of satisfaction in the museum visit based on socio-demographic variables, opinions, sensations, and information about the visit. The dependent variable used is [Satisfied], which measures the degree of satisfaction of the visitor according to a 5-Likert scale, ranging from 1 "nothing" to 5 "much" and 1 "very bad" to 5 (very good) equivalent to "Very unsatisfied" to "Very satisfied." The dependent variable is categorical and orders the degree of satisfaction of the MUMOG's visitor.

#### 4 RESULTS

The results obtained from the ordered Logit model in categories of explanatory variables were significant at 90%, 95%, and 99% regarding opinions of the services, feelings, sensations, profiles, and the visit. Following the relevant results are detailed.

As expected, in allusion to the service dimension, attendees with a good opinion about access and facilities for people with disabilities increase their chances of being more satisfied with the visit, as presented in Table 5. Meanwhile, if a visitor has a very good opinion about the documentation center and library service, it increases their satisfaction. Regarding the guided visit, according to the results, indifference does encourage satisfaction; it is good or very good, but it does not matter. The same for activities of the museum, attendees that score indifferent are more likely to be satisfied with the museum. Likewise, having a bad opinion of the resting zones and restrooms negatively affects the attendees' satisfaction. The rest of the items representing the opinions on services of the visitors were either insignificant or did not show conclusive results in the different response categories.

Table 5: Results of the ordered Logit model for services

Opinions of services used in the museum		
Item	Odds ratio	St. Error
<i>Access and facilities for disabled</i>		
Bad	5.29e-16***	5.81e-15
Indifferent	4191*	21129.43
Good	1155601**	6684816
Very good	3543.827*	17213.73
<i>Documentation Center/Library</i>		
Very bad	3.62e-14**	4.83e-13
Very Good	1979573*	1.70e+07
<i>Guided visit</i>		
Indifferent	1.77e+10**	2.17e+11
<i>Resting zones/restrooms</i>		
Bad	6.24e-12**	6.31e-11
<i>Museum activities</i>		
Indifferent	.000019**	.0000973
Good	.0000886**	.0003703

Source: own elaboration

Note: \*, \*\* and \*\*\* indicate significance at 90%, 95% and 99%

Concerning sensations and feelings, results show that if a visitor feels quite tired or uncomfortable during the visit, it will be more likely to negatively affect his satisfaction (Table 6). Also, the visitor who felt that he lost track or waste time, even if he is a little indifferent, will have a higher level of satisfaction. Time is essential for satisfaction. For visitors, time spent at the museum is undoubtedly satisfying.

According to data, if a visitor gets bored or lethargic, it is more probable that it decreases his level of satisfaction, especially if he feels tired. On the other hand, data show that learning something new at the MUMOG significantly, when considered much, positively affects attendees' satisfaction (Table 6).

If the visitors feel enjoyment, serenity, and happiness, even if little increases their satisfaction, the greater the feeling, the more satisfaction. It is one of the indicators of the data more significantly rated.

Table 6: Results of the ordered Logit model for feelings/sensations

Feelings/ sensations experimented on during the visit		
Item	Odds ratio	St. Error
<i>Tired-uncomfortable</i>		
Quite	2.23e-12**	2.51e-11
<i>Losing track of time</i>		
Little	6.51e-06***	.0000301
Indifferent	1.44e-07**	1.06e-06
<i>Bored-lethargic</i>		
Indifferent	514979.9*	3982327
Quite	1.02e-15***	1.08e-14
Much	2.42e-33***	6.08e-32
<i>Learn something new</i>		
Indifferent	3.16e+07**	2.82e+08
Much	1327687**	1.01e+07
<i>The sensation of wasting time</i>		
Little	26601.7*	148371.2
Indifferent	1059.777*	4255.534
Quite	2602600**	1.73e+07
<i>Enjoyment Serenity Happiness</i>		
Little	7.04e+07**	4.98e+08
Quite	3.96e+09***	2.81e+10
Much	1.31e+13***	1.25e+14

Source: own elaboration

Note: \*, \*\* and \*\*\* indicate significance at 90%, 95% and 99%

As with the variables referring to the visitor's profile, the following results. First, being a male visitor is more likely to impact satisfaction positively. On the contrary, those visitors with a technical level of education experienced a lower level of satisfaction; nevertheless, being a graduate promotes satisfaction (Table 7). Regarding marital status, if the visitor is separated or divorced, the level of satisfaction will be higher than if he is single. Finally, those visitors with minimum, low, and high incomes have a higher level of satisfaction.

Table 7: Results of the ordered Logit model for the profile

Profile of visitors		
Item	Odds ratio	St. Error
<i>Gender</i>		
Male	.0001739***	.0005268
<i>Education</i>		
Graduate	2.71e-06**	.0000137
Technical	5.40e-09**	5.19e-08
<i>Marital status</i>		
Separated or divorced	3.82e+07**	3.24e+08
<i>Income</i>		
\$2,402-\$4,802 (Minimum wage)	.0004189**	.0016639
\$24,013-\$36,018 (High wage)	2055.8*	8674.187
\$4,803-\$7,203 (Low wage)	.0009389*	.0038274
\$7,204-\$12,006	2921837***	1.47e+07

Source: own elaboration

Note: \*, \*\* and \*\*\* indicate significance at 90%, 95% and 99%

Next, according to information about the museum visit, those visitors who intended to visit this museum before arriving in the city experienced a higher level of satisfaction than those who did not (Table 8).

On the other hand, if the visitor made purchases, the level of satisfaction is higher than if they did not. Furthermore, regarding the visit repetition, the results are conclusive; those respondents who said it was improbable, probable, and very probable are less satisfied. Finally, about the companion, if the visitor goes accompanied by couple, family, or friends, the impact on satisfaction is more significant compared to having visited the museum alone.

Table 8: Results of the ordered Logit model for information about the visit

<i>Information about the Museum visit</i>		
<i>Item</i>	<i>Odds ratio</i>	<i>St. Error</i>
<i>Intention</i>	344846.7**	1947213
<i>Purchases done</i>	.0008424**	.0025286
<i>Visit Repetition</i>		
Improbable	1.92e-07***	1.10e-06
Probable	1.17e-08***	5.66e-08
Very probable	2.47e-11***	1.32e-10
<i>Companions</i>		
Couple	2902924**	1.98e+07
Family	3.26e+10***	3.01e+11
With other families	3.29e+07**	2.60e+08
With Friends	413214.8*	2828462

Source: own elaboration

Note: \*, \*\* and \*\*\* indicate significance at 90%, 95% and 99%

The value of the chi-square likelihood ratio and its associated p-value (Table 9) verifies that the model as a whole is statistically significant compared to the null model without predictors. Finally, regarding the goodness-of-fit measures, the pseudo-R-square value and the Log-likelihood show us a model representing a crucial fit to the data.

Table 9: Results of the ordered Logit model

<i>Indicator</i>	<i>Value</i>
LR chi2(204)	505.04
Prob > chi2	0.0000
Pseudo R2	0.7285
Log-likelihood	-94.129934

Source: own elaboration

## 5 CONCLUSIONS

### 5.1 Theoretical implications

This study aimed to define factors that affect attendees' satisfaction with the Guanajuato Mummies Museum in Mexico to determine needs and experience. The results showed that the opinions about the general services of the mummies influence the satisfaction of the visitors, positive or negative; in this case, resting zones and restrooms must have attention. Having deficient services is a factor that reduces satisfaction in concordance with Hume (2011). In this regard, museum activities and disabled facilities contribute to satisfaction. Also, time spent at the museum will certainly affect satisfaction, and it should manage efficiently.

Moreover, it was noticed that the learning sensation also contributed to greater satisfaction at MUMOG. Learning is one of the main elements of the museums and cultural experience and in this case, as it enhances satisfaction, the enclosure should try to maintain that sensation. Literature has studied this phenomenon deeply in museums and dark tourism as well. Learning is a variable highly presented in fright sites (Zheng et al., 2020) (Chang, 2017). People may go to the museum for curiosity, but they learn about the site. It is not only about death, according to Stone (2012) or, in this case, the mummies.

Besides, in dark tourism, the tourist seeks a sensation of a scare for pleasure or fun (Wang et al., 2021) (Bristow & Newman, 2005), the sinister history of the mummies of Guanajuato. The results show that enjoyment, serenity, and happiness contribute to higher satisfaction and are present in the mummies museum, similar to Kang et al. (2018). Although this aspect contributes to the literature on the importance of generating these sensations in macabre museums, MUMOG must continue to improve the sensations of learning and enjoyment.

In the sociodemographics variables, graduate education, being separate and divorced, and three levels of income are determinants of satisfaction for the MUMOG in concordance with Del Chiappa et al. (2013), who found that socio-demographics and length of the visit influenced satisfaction. While having made purchases in the museum and visiting the company of others had a favorable impact on satisfaction. Regarding the male gender, it would be interesting to address whether this has to do with gender stereotypes manifesting in dark tourism. According to the visit, the most excellent satisfaction was for those who already came to Guanajuato intending to visit the museum.

Indeed, this study contributes to the finding that attendees' revisit intention is not related to satisfaction in concordance with Hume (2011). Also, it contributes to the gap regarding the definition of satisfaction in dark tourism. Besides, it is crucial to determine how the Mexican dark tourism perception differs from other cultures, such as the Anglo-European perspective proposed by Speakman (2019).

### 5.2 Practical implications

This research has some practical implications; for instance, access and facilities for people with disabilities and the documentation center and library and museum activities contribute to satisfaction. The store needs particular attention; people who buy souvenirs are more satisfied than those who do not. Facilities such as the store need strategies that improve the service. Also, it could be an excellent strategy to establish a better-guided tour and design an efficient tour inside the museum, looking for a fluid visit. Finally, of course, poorly evaluated services must be enhanced.

It is also recommendable to refine a marketing strategy for MUMOG considering visitors' profiles and factors—attendees' enjoyment, serenity, and happiness are the base of satisfaction. Management should pay close attention to this need; filling this demand requires strategies to achieve satisfaction, as visitors want to be delighted at the museum. In dark tourism, a scare for pleasure is together. A strategy could be to put the experience as the core of the visit to the museum and try to develop more feelings and sensations for

the visitors. Managers and authorities of the museum should design a memorable visit and a well-developed museum experience. It should be related to touring inside the museum, and it must be creative, intuitive, rapid, and fluid to avoid feelings of boredom that decrease satisfaction. As mentioned, the greater the joy, the more satisfaction will be achieved.

Results also show that learning contributes to satisfaction; stakeholders should be aware of this and must strengthen the education variable by implementing learning tools to acquire knowledge as part of the visit and experience. Nowadays, the MUMOG needs plenty of learning strategies for visitors; for example, technology has been an instrument for achieving so in other museums.

Therefore, managers should concentrate on developing an integral and complete museum visit experience that includes affection, cognition, and novelty, as proposed by some researchers (Richards, 2019).

Future research should address ethics regarding the exposition of dead bodies, changes in behavior after the visit, personal interpretation of the museum, and the impact of the museum's online publications. It is acknowledged that the sample limits the scope of the findings. However, dark tourism research is limited in Mexico, and this study contributes to understanding its perception and satisfaction factors according to Mexican culture. The results obtained from the ordered Logit model in categories of explanatory variables were significant at 90%.

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# Civil aviation and tourism demand in Montenegro: A panel data approach

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## Abstract:

**Purpose:** The purpose of the paper is to investigate the role of civil aviation in the case of Montenegro, one of the smallest countries in Europe and one whose economy heavily relies on tourism.

**Methods:** For this research, a dynamic panel data approach is used, where five models are proposed for modelling tourism demand. Available seats per kilometer, the Herfindahl–Hirschman index, jet fuel prices, exchange rates, and seasonality are used as the models' explanatory variables, in line with the available literature.

**Results:** The econometric results show that all suggested models are valid, the explanatory variables are statistically significant, and their coefficients have the expected sign, suggesting a strong relationship between tourism demand and civil aviation.

**Implications:** Apart from being one of the first attempts to highlight the civil aviation and tourism nexus in the context of Montenegro, this paper contributes to the literature by suggesting a way forward for destination managers and policymakers in small countries with great tourism potential.

**Keywords:** aviation, tourism, tourism demand, Montenegro, panel data

**JEL Classification:** L83, C23, C1

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## 1 INTRODUCTION

Tourism is a complex system, and transportation plays a vital role in enhancing the accessibility of destinations. Transport for tourism demand is of a derived nature, as few people travel for the sake of travelling: most people travel to go somewhere and engage in tourism activities while spending time at a destination.

Among transport modes, air transport is of primary importance (Inkson & Minnaert, 2018; Leiper, 1990; Page, 2019). International tourists travel mainly by air and that share had increased drastically since 2000 (UNWTO, 2019). Liberalization (Graham, 1998), alliances (Morley, 2003), improvements, and innovation in the air transport industry have affected destinations all over the world (Koo, Lau,

2019), particularly their accessibility (Halpern & Bråthen, 2011; Hao et al., 2020; Hooper, 2015; Sellner, Nagl, 2010), economic development (Küçükönel & Sedefoğlu, 2017; Lenaerts, et al., 2021), social inclusion (Smyth, et al., 2012) and, in line with these, tourism competitiveness (Khan et al., 2017; Yağmur & Aksu, 2022). From tourists' perspective, these changes are key triggers of purchase decisions, in addition to money available and time (Papatheodorou, 2001). Moreover, the civil aviation industry becomes even more important in economies that are highly dependent on tourism development (Dobruszkes et al., 2016; Papatheodorou, 2021; Spasojevic et al., 2017; Warnock-Smith & Morrell, 2008). To the best of the authors' knowledge, this relationship has never been explored in the context of Montenegro, the key region of this research. The research aims to present state-of-the-art tourism in Montenegro, to propose and test models for





predicting tourism demand at both national and regional levels, and to recommend policies for further development. From an academic perspective, the research presents a solid foundation for testing models in the context of other tourism destinations, especially small (island) developing states, which rely heavily on air transport accessibility to realize their tourism potential. In this context, the paper also contributes to the wider literature on tourism development, at least from an economic perspective.

The paper is divided into five sections. After the introduction (section one) comes section two, which reviews some of the available literature on the relationship between aviation and tourism. Section three presents Montenegro as a case study, and section four discusses the empirical methodology of the paper, which is based on panel data analysis with monthly data between January 2009 and December 2018. Subsequently, section five elaborates on the results of the study, commenting on the most significant aviation-related determinant factors of tourism demand in Montenegro, and concludes by acknowledging study limitations and providing recommendations for future research.

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## 2 BACKGROUND LITERATURE

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### 2.1 Tourism demand, civil aviation, and panel data analysis

Tourism demand modeling has been one of the most explored topics in the destination management literature (Law et al., 2022; Eugenio-Martin, Patuelli, 2022; Dogru et al., 2021; Tsui, et al., 2021; Xie et al., 2021; Polyzos et al., 2021; Li et al., 2021; Broeder & Gkogka, 2020; Permatasari et al., 2019; Koo et al., 2017; Yazdi, 2017; Tsui, 2017, 2019, 2021; Hu et al., 2015; Ibrahim, 2013; Surugiu et al., 2011; Donzelli, 2010; Habibi et al., 2009; Garin-Mun, 2006). Given that inbound tourism in several countries strongly relies on air transport, it is crucial to design a tourism development strategy along with air transport liberalization (Shaw, 1982) to establish solid foundations for further economic growth in the context of sustainability (Papatheodorou et al., 2019). Civil aviation and tourism are interconnected, and tourism is typically treated as the driving force of air transport transformations (Bieger, Wittmer, 2006; Duval, 2013; Graham, 2006; Papatheodorou, 2021; Tsui et al., 2021).

On the other hand, air transport liberalization can also act as a trigger of tourism demand (Koo et al., 2017; Papatheodorou, 2002). For instance, Koo et al. (2017) have explored in their research causality in direct air transport and tourist arrivals, while Rey, Myro, and Galera (2011) have investigated interconnection between low-cost carriers (LCCs) and tourism demand in the context of Spain. Moreover, Donzelli (2010) has tested the relationship between LCCs and economic growth in the case of Southern Italy, and Tsui (2017) has gone one step further and proposed a model to investigate the relationship between LCCs and domestic tourism demand here.

Alsumairi and Tsui (2017) have explored impacts of LCCs on inbound tourism in Saudi Arabia. Additionally, Tsui et al. (2019, 2021) have been working on developing econometric models using different sets of variables. Among the researchers who have focused on LCC impacts on tourism development and economic growth are Graham and Dennis

(2010), Chung and Whang (2011), Santos and Cincera (2018), and Alvarez-Díaz, González-Gómez, and Otero-Giráldez (2019). These authors take varying approaches to their research, but they all identify relationships between tourism demand and civil aviation based on panel data analysis. Tourism demand can be defined as a “measure of visitors’ use of a good or service” (Frechtling, 2012, p. 4) or as the quantity of tourist goods or services that tourists, guests, or visitors aim to purchase during their stay at a particular destination (Song et al., 2008). Key determinants of tourism demand are the number of international tourist arrivals, number of international tourists nights (Lim, 1997; Santos, Cincera, 2018), tourists’ income, tourist product prices, and exchange rates (Cao, et al., 2017; Hu et al., 2021; Massidda, Etzo, 2012; Song et al., 2019; Kankam-Kwarteng et al., 2021).

Tourism demand forecasting is pivotal for tourism policymakers (Li et al., 2020; Song et al., 2019). Time series models (basic and advanced), static and dynamic econometric models, and artificial intelligence models have typically been used for modelling tourism demand (Peng et al., 2014; Korol & Spyridou, 2020; Nuryyev et al., 2021;). It has become common to use panel data analysis for tourism demand modelling purposes (Albaladejo et al., 2016). Panel data analysis is defined as “the statistical analysis of data sets consisting of multiple observations on each sampling unit” (Lavrakas, 2008, p. 568). Panel data is generated by cross-referencing time-series observations for different units, such as countries, companies, and individuals (Baltagi, 2015). The benefits of panel data analysis are two-fold: it controls individual heterogeneity and is much more informative (Baltagi, 2008). However, it has its limitations. For instance, panel data research design problems or panel dataset distortion can arise (Lavrakas, 2008).

In terms of modeling tourism demand, panel data regression is often conducted in research (Song, Li, 2008; Song, Witt, 2000). For example, Rey et al. (2011) have applied a panel data random effect model in their research. They have used as variables the number of tourist arrivals, gross domestic product (GDP) per capita, relative price, distance between origin country and destination, price of crude, percentage of LCC passengers, host region infrastructure, and relative per capita income. Tsui (2017) has used panel data regression model and a two-stage least square model. As variables, the author has used the number of domestic nights, available seat kilometers (ASK), GDP per capita, aviation fuel price, petrol price, Herfindahl–Hirschman index (HHI), and regional tourism indicators for the accommodation, and food and beverage sectors. Koo et al. (2017) have used a panel data linear additive model and the following variables: the number of tourist arrivals, Australian departures, GDP per capita, consumer price index (CPI), exchange rates, air liberalization index, total number of available flights, and permanent resident arrivals.

Alsumairi and Tsui (2017) have proposed the Box–Jenkins SARIMA-X models for forecasting tourism demand. Their variables are the number of international tourist arrivals, total ASK for regular and LCCs, CPI, exchange rate, aviation fuel price, and the HHI. Finally, Tsui et al. (2019) have executed a three-stage least square model for panel data. The main variables here are the number of guest arrivals, ASK, GDP per capita, population size, total hotel capacity, exchange

rates, interest rates, net migration, number of new houses, regional tourism indicator for accommodation, and food and beverage sectors, transport, and domestic infrastructure. Tsui et al. (2021) have explored tourism demand and aviation in the context of Hong Kong. They have used tourist arrivals as the dependent variable and ASK as the explanatory variable. Their results show a strong relationship between tourism arrivals and scheduled airline services (Tsui et al., 2021a). This is an expected but important finding, which has also been tested in the case of Montenegro, as discussed in the following sections of this paper.

**2.2 Montenegro as a case study**

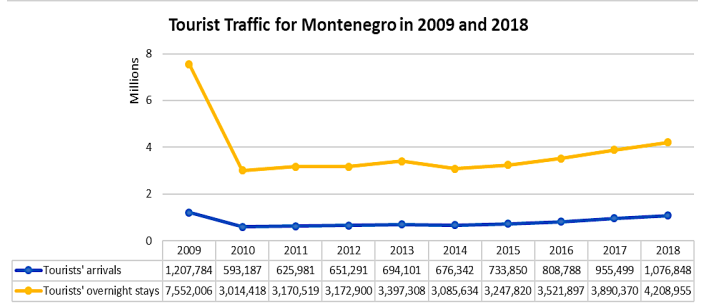
Montenegro, one of the smallest European countries, is in Mediterranean Europe, on the coast of the Adriatic Sea. With a population of less than 650,000, Montenegro covers an area of nearly 14,000 km<sup>2</sup> (Monstat, 2019a) and is surrounded by Albania, Croatia, Bosnia and Hercegovina, and Serbia. Montenegro is an EU candidate country (European Commission, 2021) and has been known as a “wild beauty” (its official slogan) destination (NTO Montenegro, 2020) since its proclamation of independence in May 2006 (Vitic, Ringer, 2008). In addition, Montenegro is an emerging tourist destination (Terzibasoglu, 2015) that bases its economy on tourism development (Ministarstvo Ekonomije, 2014). Tourism plays an important role in the country’s economy, supported by facts such as the following: the total contribution of tourism to GDP was 12.16% (\$0.51 billion) in 2009 and 21.59% (\$1.18 billion) in 2018, while the direct contribution was 6.52% (\$0.27 billion) in 2009 and 10.38% (\$10.38 billion) in 2018 (WTTC, 2019).

The total contribution of tourism to employment was 10.74% in 2009 and 17.15% in 2018, while the direct contribution was 5.68% in 2009 and 6.83% in 2018 (WTTC, 2019). Put differently, the average growth rate of total tourism contribution to national GDP has been 4.56% per year, while the growth rate of total tourism contribution to employment has been 2.71% for the abovementioned period.

Montenegro was visited by 1.07 million tourists in 2018 (Monstat, 2019b). Due to economic crisis, the Montenegrin economy was attacked dramatically, and the consequences are still felt. The consequences were slightly noticed in 2008 and 2009 (Figure 1). The real estate market was booming due to foreign investments, which had increased from \$400 billion (2000) to \$1833 billion (2007) (Fabris, Kilibarda, Radunovic, & Rakocevic, 2008). Most real estate was bought by Russians, which is why Montenegro became known as “Moscow on the water” (Bilefsky, 2008). This led to an increase in the number of tourists from Russia. The first real signs of adverse conditions emerged in 2010 (Figure 1). While other economies have been recovering since 2010, Montenegro’s economy has declined, despite emerging destinations typically experiencing more rapid recovery than mature locations (Laws, Prideaux, 2005).

Inbound tourism contributed to Montenegrin tourism at 84% in 2009 and 89% in 2018 (Monstat, 2019a). One of the main characteristics of Montenegrin tourism is high seasonality (Bigović, 2012; Petrevska, 2014), and the destination is mainly visited during summer months (June, July, and August) (Figure 2).

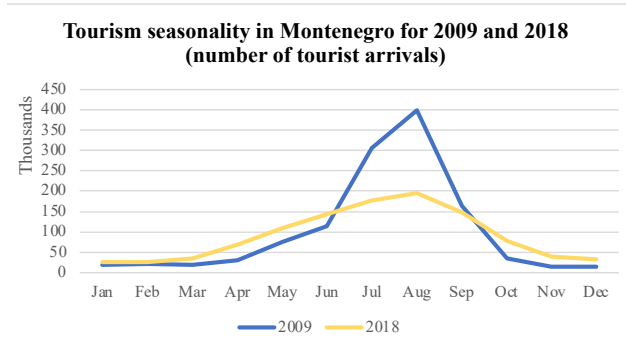
Figure 1: Tourist Traffic for Montenegro in 2009 and 2018



Source: Monstat (2019b)

The top 10 inbound markets have not changed significantly since 2009 (Table 1). Serbia and Russia are still the key tourism source markets. Thanks to new strategic orientation, Montenegrin tourism development is now more focused on both Western markets and Russia (Bulatovic, Vujicic, 2018). According to the Travel and Tourism Competitiveness Index, in 2018 Montenegro was positioned at 67, five positions higher than in 2016 (WEF, 2019). Although Montenegro is a new and fast-growing tourist destination (Cerović Smolović et al., 2018; Statista, 2014), its competitiveness indexes are not comparable with leading, more mature destinations such as Malta or Cyprus. Destination management, as well as tourism development planning and policy, is recognized as critical in tourism development (Bulatović et al., 2018).

Figure 2: Tourism Seasonality in Montenegro (2009 and 2018)



Source: Monstat (2019b)

Table 1: Top 10 Source Markets for Montenegro in 2009 and 2018

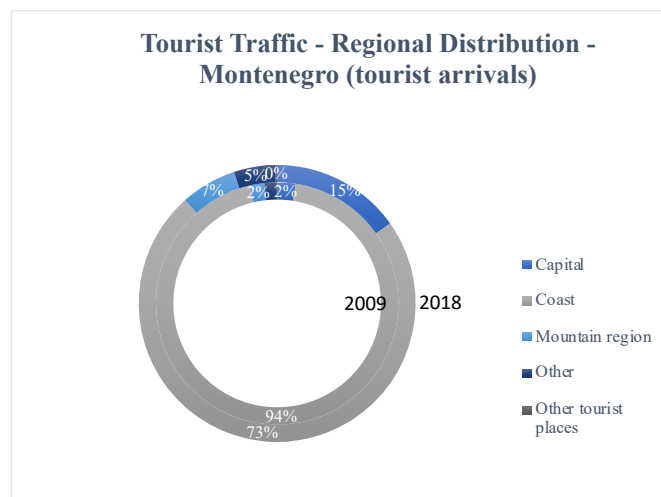
Top 10 Source Markets				
N	2009	%	2018	%
1	Serbia	26.3	Serbia	19.7
2	Russia	15.3	Russia	16.3
3	Bosnia and Herzegovina	9.2	Bosnia and Herzegovina	9.3
4	Kosovo	5.2	Germany	4.3
5	Italy	3.1	France	3.7
6	France	2.9	Poland	3.3
7	Albania	2.4	Albania	3
8	Hungary	2.3	UK	3
9	Czech Republic	2.1	Ukraine	2.7
10	North Macedonia	1.8	Kosovo	2.1

Source: Monstat (2019b)

Montenegro is mainly a sea, sand, and sun destination (Bulatović, Stranjančević, 2019b), as reflected by its tourist arrivals distribution (Figure 3). Tourism development in Montenegro is focused on its coastal areas. However, it is noticeable that in the last nine years, tourist arrival distribution has changed. Podgorica, Montenegro's capital, has exhibited increased levels of visitation since 2009 due to its emergence as a key business tourism destination. The coast and the capital are the most developed regions in Montenegro, while the mountain region is often deemed the most beautiful and unspoiled area. However, this region is underdeveloped, which causes population migration (Rajovic, Bulatovic, 2013; Rajović, Bulatović, 2016). Besides sea, sand, and sun tourism, the most developed types of special interest tourism are MICE tourism and nautical (Mitrovic, Gloginja, 2019).

The marina Porto Montenegro is recognized as a world-class marina, the first and only Platinum Marina award holder in the world (Porto-Montenegro, 2017). Despite significant potential for the development of cultural and historical tourism (Milošević, 2014; Moric et al., 2021; Vučetić, 2011), ecotourism (Bulatović, Rajović, 2017a; Bulatović, Tripković-Marković, 2015; Ratkovic, Bulatović, 2013; Vujacic, 2013), sport tourism (Bulatović, Rajović, 2017b; Klaric, 2008), religious tourism (Bulatović, Stranjančević, 2019a), casino tourism (Bulatović et al., 2017), and MICE tourism (Benner, 2020) are still at an early developmental stage. Montenegro has aligned its tourism development policy with the UN Agenda 2030 and set its strategic goals in line with the Sustainable Development Goals (Galli et al., 2018).

Figure 3: Tourist Traffic: Regional Distribution in Montenegro (%)



Source: Monstat (2019b)

During 2019, Montenegro recorded its highest number of tourist arrivals and tourist overnight stays. More specifically, the number of tourist arrivals increased by 19.97% (2,645,217 arrivals), while the number of tourist overnight stays increased by 11.79% (14,455,920 stays) (Monstat, 2021). There was no change to the top 10 source markets, while minor changes emerged for regional distribution in favor of the mountain region (Monstat, 2021).

2020 was an extremely difficult year for the Montenegrin economy due to the COVID-19 pandemic, similarly to other countries. However, in May 2020, the Montenegrin government announced that the country was “the first Europe’s coronavirus-free state” (Reuters, 2020). Later, in June 2020, the European Commission published a list of countries that were safe for travel (Petrelli, 2020). That Montenegro was included in this list proved important, as it mitigated the risk of state bankruptcy given that the country’s economy is highly dependent on tourism.

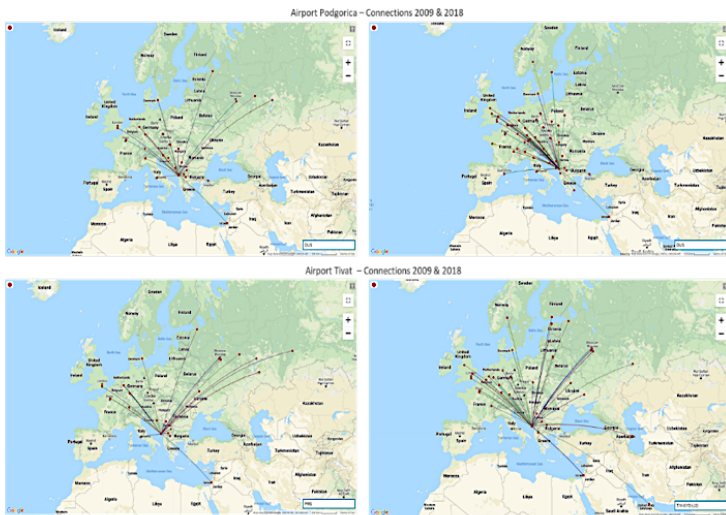
In spite of the government’s efforts to save the economy, Montenegrin tourist traffic in terms of the number of tourist arrivals dropped by over 95% in 2020 (Monstat, 2021). The situation was slightly better for the number of tourist overnight stays. These dropped by 82.1% (Monstat, 2021). In 2021, 1,670,879 tourists visited Montenegro, while the number of tourist overnight stays reached 9,872,573 (Monstat, 2021). It is clear that Montenegro is recovering slowly but steadily from the COVID-19 pandemic impacts. During 2022, tourism in Montenegro has been affected by additional factors, such as the war between Russia and Ukraine (the top source markets), high inflation, and political instability in the country.

From a transportation perspective, Montenegro is not easy to reach. First, there is no highway that connects Montenegro to the key regional roads. The highway Bar-Boljari is under construction; however, further investments are needed to link Montenegro with highways of neighboring countries. Water and rail transport are both underdeveloped and unsafe for travelers. Therefore, tourism in Montenegro is highly dependent on air transport (Radulovic, 2012).

There are two international airports. One is located in the capital, Podgorica Airport (IATA: TGD; ICAO: LYPG), and the other in the coastal region, Tivat Airport (IATA: TIV; ICAO: LYTIV). Podgorica has one runway, 2500 m long and 45 m wide, six parking positions for category C aircraft (airspeed range: 121–140 knots—airline jet), and the possibility of parking category D aircraft (airspeed range: 141–165 knots—large jet/military jet) in parking positions 5 and 6. Furthermore, there are three parking positions for general aviation aircraft (wing span ≤20m), one parking position for aircraft (category C). A passenger terminal (5500 m<sup>2</sup>) has eight check-in counters and eight exits (Stathopoulos et al., 2019).

On the other hand, Tivat Airport has only one runway. Tivat Airport has seven parking positions for categories C and D aircraft. Its passenger terminal (4050 m<sup>2</sup>) has twelve check-in counters and six exits (Stathopoulos et al., 2019, p. 63). How these two airports connect to the rest of the world is illustrated in Figure 4. Podgorica Airport, in 2009 had 23 connections, while it had 44 in 2018 (OAG, 2019). Tivat Airport had 20 connections in 2009, jumping to 35 in 2018 (OAG, 2019). Montenegrin airports’ capacity expansion is planned, with a new strategy of traffic development extending to 2035 (Stathopoulos et al., 2019). During 2020, airports in Montenegro were closed to passengers until June 1st (Novi Početak, 2021) due to the COVID-19 pandemic. Currently, airports in Montenegro serve 21 different routes (Figure 4), according to Flightradar 24 (2021).

Figure 4: Montenegro Airport Connections in 2009 and 2018



Source: (OAG, 2019)

The country's first national airline, Montenegro Airlines, started operating in 2000. It had six aircraft and 43 regular lines in 2018, jumping to 46 in 2019. The number of seats was 692 (Monstat, 2020). Due to radical changes on the political stage of Montenegro following parliamentary elections in 2020 (Utjesinovic, 2020), Montenegro Airlines was liquidated by the new government, as the company was not profitable (Fabinger, 2020). A new airline, Air Montenegro, was launched in May 2021 (Rains, 2021), but due to the COVID-19 pandemic, air transport in Montenegro was closed for some time.

### 3 METHODOLOGY AND DATA

For the purposes of research, panel data regression analysis was used. Creating panel data regression models has been popular among researchers in several study areas (Baltagi, 2006; Tsionas, 2019). As mentioned in the literature review, panel data analysis is commonly used for forecasting and modeling tourism demand (Albaladejo et al., 2016; Alsumairi, Tsui, 2017; Song, Li, 2008). Dynamic panel data analysis was undertaken using EViews 9, a well-recognized software for general econometric analysis (McKenzie, Takaoka, 2012). We applied two-stage least squares analysis to estimate our empirical models. Due to the high seasonality of tourism in Montenegro (Bigović, 2012) as well as the uneven distribution of tourist arrivals regionally (Bulatović et al., 2018), we established five different models, to test whether the number of tourist arrivals, total and per tourist regions identified by Monstat (2019b), could be determined by the explanatory variables listed below.

ASK: commonly used in research as an indicator of airlines' growth capacity and the distance between tourists' origin country and preferred destination (Alsumairi, Tsui, 2017; Belobaba et al., 2015; Mhlanga, 2019; Papatheodorou et al., 2012). According to Salarzadeh Jenatabadi (2013), ASK can be used as a latent variable to measure airline capacity and predict airline performance. As discussed in the literature review, ASK is commonly used in exploring tourism demand

models and testing the relationship between tourism and aviation (Alsumairi, Tsui, 2017; Song, Li, 2008; Song, Witt, 2000; Tsui, 2017; Tsui et al., 2019; Tsui et al., 2021).

Jet Fuel Prices (JFP): impact on tourism demand, since travelers are price sensitive. Moreover, JFPs can serve as an airfare proxy (Alsumairi, Tsui, 2017; Atems et al., 2019; Tsui, 2017; Tsui, Balli, 2016; Tsui et al., 2021; Wadud, 2015).

Exchange Rates (EXCHRATE): another economic variable frequently used in modelling tourism demand (Albaladejo et al., 2016; Alsumairi, Tsui, 2017; Baltagi, 2015; De Vita, Kyaw, 2013; Dogru et al., 2017; Irandoust, 2019; Peng et al., 2014; Song, Li, 2008; Song et al., 2019; Song et al., 2008; Zhang et al., 2020). As discussed above, Montenegro's top source tourist market is Russia. Therefore, we chose the exchange rate variable US dollar per euro (the official currency of Montenegro) monthly average because there is an extremely strong correlation between dollar appreciation and the Russian ruble (Urbanovsky, 2015). We did not consider other top sources of tourist markets, such as Serbia, Bosnia and Herzegovina, Albania, and Kosovo or their currency because tourists from these countries typically travel by car, not plane, so they would not be relevant.

HHI: extensively used as an indicator of airlines' market concentration: a highly concentrated market is likely to be less competitive (Alsumairi, Tsui, 2017; Hao et al., 2020; Tsui, 2017; Wang et al., 2018). In our case, the HHI illustrates competition for the Montenegrin aviation market. The HHI values vary from 0 to 10,000, where 0 indicates the most competitive aviation market (Alsumairi, Tsui, 2017). It was expected that we would have negative HHI coefficient in our econometric model for several reasons directly and indirectly related to the aviation market. First, Montenegro is a small, developing country and its aviation infrastructure is quite poor, as explained in the previous chapter.

Seasonality (SEASON): determines tourism demand (Chan, Lim, 2011; Dobruszkes et al., 2019; Goh, Law, 2002; Petrevska, 2014; Vatsa, 2020). In our case, SEASON was inserted as a dummy variable and calculated based on tourist traffic and flight statistics. In other words, we identified the months May, June, July, August, and September as those when tourism seasonality is evident.

In line with the literature review, for the purposes of our research, an unbalanced panel or longitudinal (Longhi, Nandi, 2015; Park, 2015) dataset was created. Due to a lack of data in our panel dataset, we included monthly data from February 2009 to December 2018 for the top 30 airlines that flew to Montenegro. The total number of observations considered for panel data regression was 3570. Data were collected from different sources, as illustrated in Table 2. According to the central limit theorem, a sample size with over 30 observations is considered normally distributed (Chang et al., 2006). Stationarity was tested by panel unit root tests, namely the Im, Pesaran, and Shin test (Breitung, Pesaran, 2008; Im et al., 2003) and an approximate degree of freedom (ADF) test (Choi, 2001), as these are appropriate tests for unbalanced data (Levin et al., 2002). We also tested multicollinearity through correlation between independent (explanatory) variables. Once defined, the empirical models of tourism demand were tested by the Durbin-Watson statistic (Brown et al., 1975).

Table 2: Descriptive Summary

CODE	Variables	Definition	Source	Mean	Median	Maximum	Minimum	Std. Dev.
ARR	Total number of tourist arrivals	logarithmic form	Monstat	10.72187	10.61945	12.8986	9.242033	0.900779
ARRCOAST	Number of tourist arrivals for coastal region	logarithmic form	Monstat	10.63488	10.31972	13.816	8.720787	1.391771
ARRCAP	Number of tourist arrivals for capital	logarithmic form	Monstat	8.748958	8.600902	9.861936	7.945201	0.474238
ARMOUN	Number of tourist arrivals for mountain region	logarithmic form	Monstat	8.223283	8.224524	9.813727	6.520621	0.685021
ARROTTOUR	Number of tourist arrivals for other tourist places	logarithmic form	Monstat	7.80866	7.884577	9.145909	5.402677	0.606426
ASK	Average seats per km	logarithmic form	OAG	14.89336	14.95403	17.89716	10.56824	1.255589
JFP	Jet fuel prices	logarithmic form	IndexMundi	0.506648	0.494696	0.936093	-0.150823	0.273692
EXCHRATE	Exchange rates (US dollar per euro monthly average)	logarithmic form	X-Rates	-0.224876	-0.249192	-0.052311	-0.399225	0.094484
HHI	Herfindahl-Hirschman Index	logarithmic form	OAG	-1.416197	-1.405567	-0.607862	-2.239028	0.45021
SEASON	Seasonality	Dummy	Personal approximation based on statistical data	0.420168	0	1	0	0.493655

Source: EViews output

Proposed tourism demand models

Model 1:

$$ARR_t = c + b_1 * ASK_{it} + b_2 * JFP_t + b_3 * EXCHRATE_t + b_4 * HHI_t + b_5 * SEASON_t + e_{it}$$

Model 2:

$$ARRCOAST_t = c + b_1 * ASK_{it} + b_2 * JFP_t + b_3 * EXCHRATE_t + b_4 * HHI_t + b_5 * SEASON_t + e_{it}$$

Model 3:

$$ARRCAP_t = c + b_1 * ASK_{it} + b_2 * JFP_t + b_3 * EXCHRATE_t + b_4 * HHI_t + b_5 * SEASON_t + e_{it}$$

Model 4:

$$ARMOUN_t = c + b_1 * ASK_{it} + b_2 * JFP_t + b_3 * EXCHRATE_t + b_4 * HHI_t + b_5 * SEASON_t + e_{it}$$

Model 5:

$$ARROTTOUR_t = c + b_1 * ASK_{it} + b_2 * JFP_t + b_3 * EXCHRATE_t + b_4 * HHI_t + b_5 * SEASON_t + e_{it}$$

i: airlines

t: the period of concern (February 2009 to December 2018),

c: constant

e: error term

b<sub>1,2,3,4,5</sub> – two-stage least square coefficient

#### 4 EMPIRICAL RESULTS AND DISCUSSION

Both models, with fixed and random effects, were tested. The results of the Hausman test (Baltagi et al., 2003; Chen et al., 2018; Frondel, Vance, 2010) show that it is preferable for further analysis to use models with fixed effects ( $\chi^2 1(7) = 137,216$ ,  $p < 0.01$ ;  $\chi^2 2(7) = 60,073$ ,  $p < 0.01$ ;  $\chi^2 3(8) = 58,526$ ,  $p < 0.01$ ;  $\chi^2 4(7) = 76,336$ ,  $p < 0.01$ ;  $\chi^2 5(7) = 135,417$ ,  $p < 0.01$ ).

As discussed in the methodology section, stationarity was tested by panel unit root tests, namely the Im, Pesaran, and Shin test and an ADF test. The results in Table 3 show that time series are stationary and the necessary requirements for performing unbalanced panel data regression analysis are met.

The results presented in Table 4 show that all proposed models are statistically significant ( $p < 0.0000$ ). Moreover, R-squared in all cases is above 0.60, which represents a good model fit (Gordon, 2015; Weisberg, 2005; Westfall, Arias, 2020). The ASK coefficients were positive in all tested models, which means that by opening new air routes, Montenegro will become more attractive to international travelers. These results correspond with the results of Alsumairi and Tsui (2017), Tsui (2017), Tsui et al. (2019), and Tsui et al. (2021).

Table 3: Panel Unit Root

CODE	Meaning	Im, Pesaran, and Shin test		Approximate degree of freedom (ADF) test	
		Individual intercept	Individual intercept and trend	Individual intercept	Individual intercept and trend
ARR	Total Number of Tourist Arrivals	-29.0342*	-37.4488*	867.39*	1084.04*
ARRCOAST	Number of Tourist Arrivals for Coastal Region	-51.9685*	-53.6855*	1059.81*	1626.45*
ARRCAP	Number of Tourist Arrivals for Capital	-3.67941*	-21.4938*	82.8402*	516.965*
ARMOUN	Number of Tourist Arrivals for Mountain Region	-23.6773*	-28.7756*	651.258*	765.048*
ARROTTOUR	Number of Tourist Arrivals for Other Tourist Places	-29.0342*	-37.4488*	867.39*	1084.04*
ASK	Average Seats Per km	-7.00695*	-8.04967*	201.211*	278.297*
JFP	Jet Fuel Prices	-1.51841*	-2.36941*	459.217*	562.302*
EXCHRATE	Exchange Rates (US Dollar per Euro Monthly Average)	-18.6455*	-21.0387*	432.958*	560.962*
HHI	Herfindahl-Hirschman Index	-8.72019*	-13.7168*	274.086*	354.548*

\* Statistical significance at 1%

Table 4: Empirical Results

Independent (Explanatory) Variables	Dependent Variables				
	ARR	ARRCOAST	ARRCAP	ARMOUN	ARROTTOUR
	Total Number of Tourist Arrivals	Number of Tourist Arrivals for Coastal Region	Number of Tourist Arrivals for Capital	Number of Tourist Arrivals for Mountain Region	Number of Tourist Arrivals for Other Tourist Places
ASK	0.256811*	0.408658*	0.098163*	0.196856*	0.307187*
JFP	-0.403465*	-0.248918*	-0.331055*	-0.392124*	-0.400976*
EXCHRATE	-1.451567*	-0.732018*	-0.566482*	-0.700805*	-0.592713*
HHI	-0.646195*	-0.204351*	-1.007969*	-0.445428*	-0.574439*
SEASON	1.16984*	2.098494*	0.102369*	0.783898*	0.45195*
C	5.462086*	3.404138*	5.952744*	4.437216*	2.380277*
R-squared	0.838455	0.802257	0.871768	0.685781	0.633285
Adjusted R-squared	0.834568	0.79707	0.868404	0.677422	0.623782
Prob (F-stat)	0	0	0	0	0

\* statistical significance at 1%

\*\* statistical significance at 5%

\*\*\* statistical significance at 10%

Another explanatory variable that is significant for tourism demand modeling is JFP. When JFP increase, air fares increase, which can negatively impact inbound tourism development. These results are in line with previous research on a similar topic (Alsumairi, Tsui, 2017; Tsui, 2017; Tsui et al., 2019; Tsui, Balli, 2016; Tsui et al., 2021). Ma, Zhang, Zhang, and Xu (2021) have stated that “higher market concentration is associated with lower passengers’ flow” (p. 7) and vice versa. Our research confirms this (negative HHI). This is closely related to the fact that most competitive airlines do not see the advantage to opening their routes to Montenegro, since it is neither a tourist hub nor business center and is not of high economic or political importance.

Moreover, inbound tourism in Montenegro is seasonal, with tourism demand highest during the summer months. Our results match those of Koo et al. (2017), Peng et al. (2014), Alsumairi and Tsui (2017), Tsui et al. (2019), Tsui and Balli (2016), and Tsui et al. (2021).

Table 5: Multicollinearity Test

Correlation					
Probability	ASK	JFP	EXCHRATE	HHI	SEASON
ASK	1				
	----				
JFP	-0.017949	1			
	0.4877	----			
EXCHRATE	0.181638	-0.521572	1		
	0	0	----		
HHI	-0.308621	0.119016	-0.615633	1	
	0	0	0	----	
SEASON	0.214276	0.073729	-0.011082	-0.316179	1
	0	0.0043	0.6683	0	----

There is no multicollinearity between the independent (explanatory) variables, as the correlation values are below the threshold (0.8) that suggests the presence of multicollinearity (Gujarati, 2009) (see the correlation matrix).

As such, the proposed models of tourism demand are valid and can be accepted for further testing and elaboration. Our research confirms a strong relationship between civil aviation and tourism development. To be more precise, tourism in Montenegro is highly dependent on the civil aviation sector due to poor land transport accessibility (lack of motorways and railroads). It means any even minor fluctuations in air traffic could reflect on tourism demand in Montenegro. By shaping tourism demand models for an entire destination (Model 1) and then for particular tourist regions (coastal region, Model 2; capital city, Model 3; northern region, Model 4; and other tourist places, Model 5), we verified that tourism demand can be explained by variables combined, as was the case for prior studies (Cao et al., 2017; Frechtling, 2012; Goh, Law, 2002; Koo et al., 2017; Li et al., 2020; Lim, 1997; Massidda, Etzo, 2012; Santos, Cincera, 2018; Song, Li, 2008; Tsui et al., 2019; Vatsa, 2020; Y.Zhang, Li, Muskat, Vu, & Law, 2021).

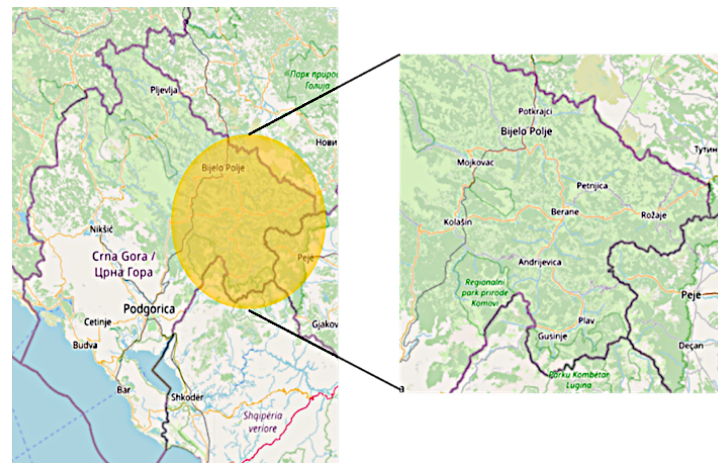
As other researchers have focused on LCCs and destination development (Alsumairi, Tsui, 2017; Álvarez-Díaz et al., 2019; Chung, Whang, 2011; Donzelli, 2010; Graham, Dennis, 2010; Henderson, 2009; Tsui, 2017; Hsu et al., 2016; Rey et al., 2011; Santos, Cincera, 2018; Wang et al., 2018), we considered both regular and LCCs, since this is one of the first studies on this topic in the context of Montenegro. It is of note that all tourism demand models have been validated in spite of not all parts of Montenegro being developed tourist regions. In other words, the current economic development strategy in Montenegro mainly focuses on tourism, and it is just matter of time until all subregions become more exposed to international tourists. Moreover, the revitalization and internationalization of Berane Airport (in the mountain region) can be seen as potential springboard that will launch a new era in tourism development, not only in Montenegro but also in neighboring countries (Albania and Serbia). As expected, municipalities,

such as Mojkovac, Kolasin, Berane, Andrijevica, Plav, Rozaje, and Bijelo Polje (Figure 5), will start crafting their tourist product intensively, which will increase airline capacity, as was the case in previous studies (Tsui et al., 2019). Moreover, Montenegro has started opening its borders to LCCs, offering a new opportunity to shape tourism demand (Alsumairi, Tsui, 2017).

Furthermore, private arrangements between hotels and airlines can boost tourism demand, focusing on special interest tourism, as was the case with casino tourists from Italy who used to fly on charter flights to Montenegro every Friday and Sunday (Bulatović et al., 2017). High summer seasonality will remain for years to come, especially in times of the COVID-19 pandemic, where each destination that keeps the spread of the virus under control attempts to attract as many tourists as possible to boost its economy.

Our research confirms that fundamental econometric theory is still valid. Considering the facts that the tourism sector in Montenegro has started recovering rapidly from the low 2020 levels and that tourism is still regarded as the priority for economic development in Montenegro, we expect that the proposed econometric model for forecasting tourism demand will be also relevant in the post-COVID-19 era. However, it is hard to predict any significant special interest tourism demand changes in the context of Montenegro. Assuming the world’s trends (Bulatovic, Iankova, 2021), there is great opportunity for creating completely new tourism demand, such as for medical purposes or even digital nomads. However, it may prove difficult for the Montenegrin tourism system to adapt quickly and create the necessary tourist offer, due to the lack of collaboration between public and private sectors and between Air Montenegro and hoteliers, the unstable political scene, and the unsteady ground in terms of foreign investments.

Figure 5: Map of Montenegro



Source: OpenStreetMap (2021)

## 5 CONCLUSIONS

In this paper, we explored the relationship between civil aviation and tourism demand in the context of Montenegro. We tested five tourism demand models with fixed effects, considering as dependent variables the number of international tourist arrivals to Montenegro and the number

of international tourist arrivals to different regions in Montenegro (coastal regions, mountain regions, capital, and other tourist places). Likewise, we utilized a set of explanatory variables: ASK, the HHI, exchange rates, and JFP, and the dummy variable SEASON. Only ASK differs at the airline level; all other variables exhibit variability solely over time. However, this is not regarded as a problem as our dynamic panel data analysis confirms a strong explanatory power of the above-mentioned variables in modelling tourism demand at both national and regional levels.

To the best of the authors' knowledge, this research is the first of its kind undertaken in the context of Montenegro. From a scientific perspective, it can serve as a foundation for future analysis on the same or a similar topic. However, the proposed models of tourism demand can be extended. For example, we did not test the impacts of civil aviation on tourism growth, or special interest tourism demand models, which are research limitations. In line with research trends, it is highly recommended to monitor impacts of LCCs on tourism demand in Montenegro to explore both sides of the coin: impacts on inbound and outbound tourism. Although the quantitative analysis is based on pre-COVID-19 data, it is believed that the identified attributes are and will remain relevant when a new post-pandemic state of normality is reached.

Since the research is mainly quantitative, which is considered an additional limitation, detailed qualitative analysis is also needed to consider the impact of COVID-19 and the current war between Russia and Ukraine on inbound tourism in Montenegro. In any case, the current research represents a good starting point for decision-makers at all levels, especially those at the top. It can also prove of interest to low-cost and regular airlines interested in flying to Montenegro, as well as to airport infrastructure providers and other tourism stakeholders. In fact, open skies can boost inbound tourism traffic and generate tourism development, provided that the destination does not end up becoming a victim of its own success due to environmental sustainability issues.

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# Behavioural intention of tourists towards volunteer tourism: A developing country perspective

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## Abstract:

**Purpose:** Although volunteer tourism has been studied via several theoretical lenses, little is known about the behavioural intention of potential volunteer tourists from developing nations. This study aimed to identify the behavioural intention of potential volunteer tourists and the factors motivating them. This study extends the theory of planned behaviour (TPB) to identify the potential volunteer tourists' behavioural intentions by adding four motivations: altruism, personal development, escape, and travel.

**Methods:** A total of 272 valid responses were collected through an online survey. SmartPLS 3.0 was used to test the hypotheses.

**Results:** The findings indicate that attitude, perceived behavioural control, subjective norms, escape, and personal development positively influences potential volunteer tourists' intention to take part in volunteer tourism programs. However, altruism and travel do not influence the potential volunteer tourists' intention to take part in volunteer tourism programs.

**Implications:** Volunteer tourism organisers will get help from the present study's findings to design or improve volunteer tourism programs and activities accordingly, resulting in improved volunteer tourism experiences and, ultimately, impacting the tourists' intention to take part in volunteer tourism programs.

**Keywords:** Volunteer tourism, Theory of planned behaviour, Motivations, Potential volunteer tourists, Behavioural intention

**JEL Classification:** L83, L52, E7

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## 1 INTRODUCTION

Volunteer tourism is an alternative form of tourism that integrates leisure travel and volunteer activity together (Han et al., 2020). Volunteer tourism is viewed as a type of tourism that offers unique and authentic travel experiences while also promoting the long-term development of local communities

(Meng et al., 2020; Shekhar, 2022). Hence, the concept of volunteer tourism and sustainable tourism is considered to be strongly associated with one another (Raymond & Hall, 2008). Sustainable tourism is a tourism form that incorporates sustainable development in the tourism industry (Higgins-Desbiolles, 2018). It entails using tourism resources to serve the present demand of host communities,



environment and visitors without jeopardising the future demand (Fodness, 2017; Higgins-Desbiolles, 2018; Chouhan, 2022). Volunteer tourism brings financial, social, and ecological benefits to the host community and, hence, reflects the principles of sustainable tourism (Pompurová et al., 2020; Manosso & Domareski Ruiz, 2021).

Tourists' preference for a sustainable form of tourism has gained momentum after the recent global pandemic (Khan et al., 2022). Volunteer tourism has also experienced substantial growth globally in recent years (Proyrungroj, 2020). Volunteer tourism has gained popularity due to several factors, such as lesser travel restrictions, tourists' desire to take unique tourism experiences (Wearing & McGehee, 2013), and general awareness about destitution and other issues in developing nations (Callanan & Thomas, 2005).

The spectacular development and increased attractiveness of volunteer tourism have prompted more researchers to study this topic, especially from developed countries. The prior studies on volunteer tourists have concentrated chiefly on tourists from high-income countries who serve in low-income countries, with little emphasis paid to tourists from developing countries who volunteer within their own country (Benali & Kravets, 2022; Bone & Bone, 2018; Gilbertson et al., 2021; Kontogeorgopoulos, 2017; Nadeau & Lord, 2017; Proyrungroj, 2020; Del Chiappa et al., 2021). Only a few studies (Mertens, 2022; Pompurová et al., 2020; Rattan et al., 2012) have focused on domestic volunteer tourism, i.e. volunteering within the country. Furthermore, there are limited studies on this form of tourism in developing countries like India compared to other tourism types such as cultural tourism, ecotourism, adventure tourism, and rural tourism. Moreover, research on volunteer tourism in India is in its early stages.

Studies in India have focused on neo-colonialism (Gilbertson et al., 2021), host community (Frilund, 2015; Guttentag, 2011), international volunteerism (Yea et al., 2018), motivations of international volunteers (Bone & Bone, 2018; Schuhbert & Thees, 2020), and volunteer tourism and religion (Bandyopadhyay, 2018). Therefore, the researchers believe that more studies on volunteer tourism in India should be done, as the findings of these studies could provide more understanding about this type of tourism and could also provide insight into how to improve and stimulate volunteer tourism in a more sustainable manner. In order to persuade potential volunteer tourists to join volunteer tourism programs, it is crucial to understand the factors motivating them to participate in such programs.

For this purpose, the research has adopted the theory of planned behaviour (TPB) to study tourists' behavioural intentions for participating in volunteer tourism. Nonetheless, some researchers have questioned whether the model alone is adequate for predicting individual behaviours. It is, therefore, regarded as necessary to extend the TPB model by confirming appropriate variables that are important in a particular situation (Ajzen, 1991). Volunteer tourists are generally believed to have altruistic motives and egoistic motives (Haslebacher et al., 2019), including personal development and growth (Han et al., 2019, 2020; Lee & Yen, 2015; Lo & Lee, 2011; Proyrungroj, 2017a, 2020), cross-cultural understanding (Benson & Seibert, 2009; Chen & Chen, 2011; Fotiadis & Williams, 2018; Han et al., 2020; Lo & Lee, 2011; Proyrungroj, 2017a, 2020), escapism (Benson

& Seibert, 2009; Han et al., 2019, 2020; Lee & Yen, 2015; Lo & Lee, 2011), exploration and education (Benson & Seibert, 2009; Brown, 2005; Chatzigeorgiou et al., 2019; Han et al., 2019; Lo & Lee, 2011; Proyrungroj, 2020), travelling (Chen & Chen, 2011; Leonard & Onyx, 2009; Proyrungroj, 2020), and relaxation (Benson & Seibert, 2009). However, few studies (Andereck et al., 2012; Knollenberg et al., 2014; Taylor, 2008) have explored these motivations from the perspective of potential volunteer tourists from a developing country. Andereck et al. (2012) revealed that potential volunteer tourists have varying expectations related to information for the trip, engagement with locals, and the difficulty of the work involved. Taylor (2008) indicated that possibilities for transformative learning among potential volunteer tourists might be revealed through elements of self-reflection, conversation, and intercultural encounters (Sigala et al., 2002; Knollenberg et al., 2014; Christou & Nella, 2016). The relative significance of these relevant factors would help researchers gain a more exhaustive understanding of potential volunteer tourists' behavioural intentions. In this way, our proposed model would extend the theory of planned behaviour (TPB) regarding volunteer tourism by adding required variables and would also provide practical suggestions to persuade potential volunteer tourists to take part in volunteer tourism programs.

As little is known about the behavioural intention of potential volunteer tourists from developing countries (Andereck et al., 2012; Knollenberg et al., 2014; Taylor, 2008), this study is designed to bridge the gap in the current research work on volunteer tourism. The objectives of the current study are to (i) identify the behavioural intention of potential volunteer tourists towards volunteer tourism in India and (ii) identify the factors motivating potential volunteer tourists to involve in volunteer tourism programs in the country.

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## 2 LITERATURE

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### 2.1 Volunteer tourism

Volunteer tourism has turned out to be one of the rapidly growing and most popular types of alternative tourism (Proyrungroj, 2020; Raymond & Hall, 2008; Wang, 2022; Wearing & McGehee, 2013). It is a combination of leisure travel and volunteering activities (Han et al., 2020; Proyrungroj, 2020). Various researchers have attempted to define volunteer tourism. Brown (2005) explained volunteer tourism as a practice whereby a volunteer tourism organisation provides tourists with the chance to involve in an extra trip which includes both a volunteer element and a chance to interact with the locals. Brown has highlighted the phenomenon of benefiting the locals while practising volunteering activities and has also focused on cultural exchange. (Gajdošik et al., 2022)

According to the existing studies (Aquino & Andereck 2022; Broad, 2003; Everingham et al., 2022; Gajdošik et al., 2022; Lee, 2022; Nella & Christou, 2021; Lee, 2020; McIntosh & Zahra, 2007; Park et al., 2022; Proyrungroj, 2015, 2017b; Raymond & Hall, 2008; Wearing, 2001; Wright, 2013), volunteer tourism is supposed to be equally beneficial for volunteer tourists and the locals. The benefits received by the host community through volunteer tourism can be grouped into three broad categories: financial, social, and ecological

benefits. The financial benefits that the host community receives through volunteer tourism programs include monetary support, local employment opportunities, improved infrastructure, and other facilities (Lee, 2020; Proyrungroj, 2017b). As for the social benefit, volunteer tourism helps in the betterment of the host community by providing funds (McIntosh & Zahra, 2007; Wearing, 2001) and also offer opportunities for education to the host community (Gajdošik et al., 2022; Lee, 2021; Wright, 2013) and stimulate native cultures and beliefs (Weaing, 2001). Regarding allied environmental advantages, volunteering in environmental projects can help restore and conserve the environment at the destination (Broad, 2003; Gajdošik et al., 2022; Park et al., 2022; Wearing, 2001; Wright, 2013).

Many existing works of literature (Broad, 2003; Harlow & Pomfret, 2007; Lo & Lee, 2011; McIntosh & Zahra, 2007; Müller et al., 2020; Pompurová et al., 2020; Proyrungroj, 2017a, 2017b; Wearing, 2001) have also highlighted the advantages of volunteer tourism programs for the volunteer tourists such as developing communication skills, cross-cultural understanding, language learning, making new contacts, environmental knowledge, gaining new experience, and learning more working skill.

Although many researchers have focused on the positive impact of volunteer tourism, some studies (Guttentag, 2009; Lee, 2021; Lee, 2020; Proyrungroj, 2017b; Wright, 2013) have also highlighted the other side of volunteer tourism and its impact on the locals. Guttentag (2009) analysed the outcomes of several studies and summarised the negative impact of volunteer tourism on local community into five categories which include ignoring the community needs, obstruction of job progress and completion of subpar work, lowered demand for labour and a rise in dependency, poverty justifications and conceptualisations of the other, and adaptation in culture. Lo and Lee (2011) found out that the hosts feel a sense of inferiority while interacting with volunteer tourists from more affluent nations. Raymond and Hall (2008) have highlighted the importance of volunteer tourism organisations in reducing the harmful effects of volunteer tourism by helping volunteers find work which both fits the requirements of volunteers and those of their hosts. Some studies (Mertens, 2022; Pompurová et al., 2020; Rattan et al., 2012) have also pointed out that domestic volunteer tourism would be beneficial in reducing the harmful impacts of international volunteering on host communities.

Although several studies have focused on the motives of volunteer tourists who have completed volunteer tourism programs, only a few studies, as indicated by Andereck et al. (2012), have focused on the potential volunteer tourists, an area that is extensively researched in various other forms of tourism. By understanding the behavioural intention and factors motivating potential volunteer tourists, volunteer tourism organisations can design or improve volunteer tourism programs and activities accordingly and sustainably promote volunteer tourism.

**2.2 Behavioural intention**

Behavioural intention indicates a person’s expected behaviour in the near future when it comes to buying products or services (Dean & Suhartanto, 2019). Correia et al. (2007) defined intention as a person’s likelihood of adopting or not

adopting a specific behaviour. Behavioural intention is an individual’s motivation to execute the actions (Conner & Armitage, 1998). It is believed that intention captures the motivational factors that influence the behaviour; it expresses the effort an individual is eager to put forth to perform the conduct. (Ajzen, 1991). Ajzen (1991) stated that an action is more likely to be performed if there is a strong desire to do so. Behavioural intention for volunteer tourism could be described as tourists’ likelihood of taking part in volunteer tourism activities.

**2.3 Theory of planned behaviour**

The Theory of Planned Behavior (Ajzen, 1991) is a psychological theory commonly used to describe and forecast an individual’s behaviour. TPB is one of the most extensively used theoretic models for describing tourists’ intentions and behaviour in tourism activities and destinations (Lam & Hsu, 2006; Quintal et al., 2015). According to the TPB, the intention is followed by action and is affected by attitude towards the behaviour, subjective norm, and perceived behavioural control (Korol & Spyridou, 2020; Nuryyev et al., 2021; Papanas & Spyridou, 2020; Samitas et al., 2020; Spyridou et al., 2023).

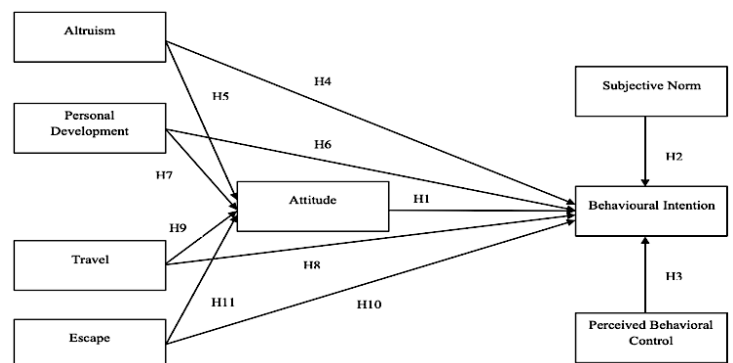
Individuals’ actions and behaviour are allied with their attitudes, and that attitude depends on how they are impacted by the behaviour (Krueger et al., 2000). Ajzen (1991) stated that the subjective norm is a variable impacted by the attitudes of those persons who are significant to the individual, like family members and friends. Usually, individuals have a tendency to follow the behaviour suitable and accepted by their social circle (Stephan & Uhlaner, 2010). Perceived behavioural control is the degree that an individual thinks about being able to carry out or not carry out a specific behaviour and having control over it. Accordingly, the more a person believes that he/she can execute the specific behaviour, the chances of him/her behaving in that way are also higher (Engle et al., 2010). As all the three components of TPB, suggested by Ajzen (1991), are found to be positively related to behavioural intention (Ajzen, 1991), the subsequent hypotheses are developed:

*H1: There is a positive relationship between attitude and behavioural intention.*

*H2: There is a positive relationship between subjective norm and behavioural intention.*

*H3: There is a positive relationship between perceived behavioural control and behavioural intention.*

Figure 1: Proposed model



In this research, we extended the TPB model by adding four motivations: altruism, personal development, travel, and escape. The proposed model is presented in Figure 1.

#### 2.4 Volunteer tourism motivations

The term volunteer tourism motivation is multifaceted, which is a force that propels volunteer tourists to look for volunteer tourism opportunities and commit them to help others while also sustaining their volunteer involvement (Han et al., 2019; Lee et al., 2014). There are different ways in which volunteer tourism motivations have been categorised. Grimm and Needham (2012) have employed a push/pull approach for categorising volunteer tourism motivations in which push motivations are the desire to help others or to better oneself, and pull motivations are related to destination attributes. Callanan and Thomas (2005) used another approach of 'shallow' and 'deep' volunteer tourists, whereby 'shallow volunteer tourists' are focused primarily on their self-development while 'deep volunteer tourists' are concerned with utilising formerly acquired skills in helping the host community.

Volunteer tourism motivations include culture, altruism, relationships, personal development, and escape (Knollenberg et al., 2014). Lo and Lee (2011) identified five chief motives of volunteer tourists: learning, altruism, education, religion, and escapism. According to Lee et al. (2013), ego enhancement, altruistic value, community concern, personal development, and social adjustment are some of the motivations of volunteer tourists. Brown (2005) has identified that cultural immersion, camaraderie, giving back, and educational and bonding opportunities motivate volunteer tourists to participate in volunteer tourism programs. Han et al. (2019) also identified five primary motivations of volunteer tourists: personal development, altruistic community concern, ego enhancement, escapism, and education. It is essential to note that only a little research has been done on potential volunteer tourists' motivations (Knollenberg et al., 2014) from developing countries. Given the significance of these volunteer tourism motivations, the present study has focused on four motivations: altruism, personal development, travel, and escape.

#### 2.5 Altruism

Altruism is selfless behaviour that benefits others (Meng, et al., 2020). According to Hoffman (1981), altruism motivation includes activities that advance the well-being of others without consciously considering self-benefits. Therefore, volunteer tourists having altruistic values try to give communities their love and caring as well as practical support (Wymer et al., 2010). Volunteer tourists assist the local community not only by providing financial and material support but also help through teaching and encouragement (Lo & Lee, 2011). As many studies (Knollenberg et al., 2014; Lee et al., 2013; Lo & Lee, 2011; Meng et al., 2020; Park et al., 2022; Wymer et al., 2010) found that volunteer tourists have altruistic motives, subsequent hypotheses are developed:

*H4: There is a positive relationship between altruism motive and behavioural intention.*

*H5: There is a positive relationship between altruism motive and attitude.*

#### 2.6 Personal development

Wang (2004) defined personal development as a desire of volunteers to gain benefits that are directed toward their own development and acquisition of new abilities. It involves the development of skills such as self-confidence and improved interpersonal skills (Jones, 2005), self-reflecting and self-evaluating (Broad, 2003; McIntosh & Zahra, 2007), career-building (Broad, 2003; Brown, 2005; Lo & Lee, 2011), and gaining global perspective (Jones, 2005). As personal development is found to be a key motivating factor in many studies (Han et al., 2019, 2020; Lo & Lee, 2011; Proyrungroj, 2020), the subsequent hypotheses are developed:

*H6: There is a positive relationship between personal development and behavioural intention.*

*H7: There is a positive relationship between personal development and attitude.*

#### 2.7 Travel

Travelling alone can be a wonderful experience, allowing people to do what they want and how they want to do it. People often travel to visit ancient monuments and places, shop for local handicrafts and other local products, learn about the local environment, and meet and know the locals. This interest seems to reflect the social motivation and the motivation to learn more about the local community (Leonard & Onyx, 2009). Many prior studies on volunteer tourism motivations have found that social motivation is one of the motives of volunteer tourists to join volunteer tourism programs (Bryen & Madden, 2006; Leonard & Onyx, 2009). As travel is a significant motivating factor for volunteer tourists (Chen & Chen, 2011; Leonard & Onyx, 2009), the subsequent hypotheses are developed:

*H8: There is a positive relationship between travel and behavioural intention.*

*H9: There is a positive relationship between travel and attitude.*

#### 2.8 Escape

Volunteer tourists are encouraged to join volunteer tourism programs since it gives them a chance to escape their everyday lives (Han et al., 2019). Lo and Lee (2011) found that volunteer trips allow tourists busy with daily work to relax and reflect on themselves. As many studies (An et al., 2022; Benson & Seibert, 2009; Han et al., 2019, 2020; Lo & Lee, 2011) found that volunteer tourists have escapism motives, the subsequent hypotheses are developed:

*H10: There is a positive relationship between escape and behavioural intention.*

*H11: There is a positive relationship between escape and attitude.*

### 3 METHODS

In this study, the researchers have focused on identifying the behavioural intention of potential volunteer tourists and the factors motivating them to participate in volunteer tourism programs. An online survey generated with google forms was used for this study. From February 2022 to August 2022, the

URL of the questionnaire was shared on many social media platforms. Two screening questions regarding respondents' nationality and prior volunteer tourism experience were used to determine whether or not the respondents were suitable for this study.

First, to ensure that only Indians should take part in the survey, only those respondents who indicated "Indian" nationality were directed to the next section of the questionnaire. Second, to ensure only participants with no prior volunteer tourism experience should take part in the survey, only those respondents who indicated "no" prior experience were directed to fill out the questionnaire. In order to increase the number of responses, the survey link was shared multiple times through the social media platform of various volunteer tourism organisations operating in India. Within this period, a total of 593 responses were collected, out of which 285 respondents were Indian nationals with no prior volunteer tourism experience.

Before conducting the final analysis of collected data, data screening and cleaning was done. Firstly, the data was visually inspected to weed out poorly filled and unengaged responses. As the data was collected through google forms, all the questions were marked as compulsory. So, there was no issue of missing value in the collected data. The data is also checked for accuracy by looking for outliers. As a result, 13 responses were deleted due to unengaged responses and outliers, resulting in 272 valid responses. The researchers also carried out a pilot study on 68 potential volunteer tourists prior to the final survey. The convenience sampling technique was utilised for the final survey as it has been extensively used in various volunteer tourism research (Han et al., 2020; Knollenberg et al., 2014). SmartPLS 3.0 was used to test the hypotheses.

### 3.1 Measurement instrument

A self-structured questionnaire was developed using the construct scales from pertinent volunteer tourism literature on a five-point Likert scale. In particular, four items for altruism, four items for personal development, and two items for escape were adopted from Knollenberg et al. (2014). In addition, four items to measure travel were adopted from Leonard and Onyx (2009). Further, three items for behavioural intention, three items for attitude, three items for subjective norm, and three items for perceived behavioural control were adopted from Manosuthi et al. (2020), Meng et al. (2020), Meng et al. (2020). These measurement items, together with the brief introduction about the ongoing research and questions related to demographic data, were all included in the survey questionnaire.

### 3.2 Sample profile

Out of 272 respondents, approximately 72.8% (n=198) were male, and 27.2% (n=74) were females. Regarding age, 69.5% (n=189) of all respondents were between 21 and 30 years old, 12.1% (n=33) were between 31 and 40 years old, 7.4% (n=20) were between 41 and 50 years old, 5.9% (n=16) were above 50 years old, and 5.1% (n=14) were below 20 years old. Regarding education level, 47.4% (n=129) indicated that they were undergraduates, 32.7% (n=89) were post-graduated, 15.8% (n=43) had a doctoral degree, 2.9% (n=8) had an intermediate degree, and 1.1% (n=3) had high school degree. Regarding economic status, 51.8% (n=141) were

employed, 30.1% (n=82) were students, 9.9% (n=27) were self-employed, 6.6% (n=18) were unemployed, and 1.5% (n=4) were retired.

## 4 RESULTS

### 4.1 Data analysis: Outer model

When assessing the outer model, the construct measures' validity and reliability are taken into consideration. Firstly, the convergent validity was measured through the factor loadings and average variance extracted (AVE) (Bagozzi & Heatherton, 1994). The results showed that the loading of each item exceeded 0.70 (Hair et al., 2006). Strong support has been provided for the constructs' convergent validity, as the bootstrapping critical ratios of all the indicators were statistically significant at  $p < .05$ , and all average variance extracted (AVEs) were more than 0.50 (Fornell & Larcker, 1981). The findings are presented in Table I.

The discriminant validity was checked through three different approaches (Hair et al., 2013; Henseler et al., 2015). To assess the discriminant validity of our analysis, we first used the recently created heterotrait-monotrait ratio of correlations (HTMT) (Henseler et al., 2015). The results showed that none of the constructs indicated discriminant validity issues for inter-construct correlations. Secondly, the cross-loadings of the indicators were examined (Hair et al., 2011). The results showed that all the indicators have higher cross-loading on their construct than on others (Hair et al., 2013). Thirdly, we compared the square root of constructs' AVE with the inter-construct correlations. As the square root of constructs' AVE was more than the inter-construct correlations in all cases, it provides strong support for the discriminant validity (Chin, 1998; Fornell & Larcker, 1981). The findings are presented in Table 2.

Internal consistency and indication reliability were used to evaluate the construct reliability (Hair et al., 2013). Dillon-Goldstein's (or Joreskog's) rho, which disclaims the idea that each manifest variable contributes equally to the latent variable, was used to evaluate internal consistency (Chin, 1998). This estimation is often interpreted in a manner similar to Cronbach's alpha. For reliability, all factors reached the acceptable threshold of 0.70 or higher (Hair et al., 2006), as shown in Table 1. Table 3 shows the constructs' reliability and validity. The evaluation of the outer model with these tests showed the validity and reliability of the measurement scales for assessing the proposed model.

### 4.2 Inner model

The coefficient of determination  $R^2$ , bootstrap critical ratios,  $f^2$  effect size, path coefficients between exogenous (independent) and endogenous (dependent) variables, and predictive relevance  $Q^2$  were examined to assess the proposed inner model (Hair et al., 2013). The findings are presented in Table 4. First, we assessed the significance of the anticipated correlations among the constructs. A one-tailed test is advised if the relationship between variables is directional when assessing associations in PLS-PM (Kock, 2015); therefore, we used a one-tailed test for analysis and calculated the t-values and p-values on the basis of bootstrapping. The analysis result indicated that 8 paths were supported in the model at  $\alpha = 0.05$  where attitude ( $\beta = 0.29$ , t



= 5.72,  $p = 0.000$ ), escape ( $\beta = 0.24$ ,  $t = 4.33$ ,  $p = 0.000$ ), perceived behavioural control ( $\beta = 0.10$ ,  $t = 2.07$ ,  $p = 0.020$ ), personal development ( $\beta = 0.17$ ,  $t = 3.16$ ,  $p = 0.001$ ), and subjective norm ( $\beta = 0.31$ ,  $t = 6.16$ ,  $p = 0.000$ ) significantly predicted behavioural intentions, resulting in the acceptance of H1, H2, H3, H6, and H10. In addition, altruism ( $\beta = 0.28$ ,  $t = 4.46$ ,  $p = 0.000$ ), escape ( $\beta = 0.25$ ,  $t = 4.24$ ,  $p = 0.000$ ), and personal development ( $\beta = 0.16$ ,  $t = 2.09$ ,  $p = 0.019$ ) are significantly related to attitude, resulting in the acceptance of H5, H7, and H11.

Table 1: Results of outer model

	Loadings	Critical Ratios	rho_A	AVE	Cronbach Alpha
Altruism - ALT			0.81	0.63	0.808
ALT1	0.81	31.39			
ALT2	0.80	28.09			
ALT3	0.77	17.53			
ALT4	0.80	29.85			
Personal Development- PD			0.89	0.74	0.885
PD1	0.84	45.12			
PD2	0.88	66.52			
PD3	0.87	60.02			
PD4	0.86	45.43			
Travel -TR			0.92	0.79	0.911
TR1	0.90	52.79			
TR2	0.89	51.95			
TR3	0.88	47.15			
TR4	0.88	58.09			
Escape -ESC			0.82	0.84	0.815
ESC1	0.92	92.78			
ESC2	0.91	74.91			
Attitude -AT			0.77	0.68	0.768
AT1	0.84	42.50			
AT2	0.83	37.76			
AT3	0.82	36.03			
Subjective Norm -SBN			0.90	0.83	0.898
SBN1	0.92	78.92			
SBN2	0.91	51.19			
SBN3	0.91	57.33			
Perceived Behavioural Control - PRBC			0.78	0.68	0.765
PRBC1	0.80	19.71			
PRBC2	0.83	25.17			
PRBC3	0.84	29.83			
Behavioural Intention -BI			0.87	0.80	0.874
BI1	0.90	66.47			
BI2	0.90	63.34			
BI3	0.88	44.34			

Note: Results were based on bootstrapping with 272 samples

Table 2: Fornell-Larcker criterion-based discriminant validity analysis

	ALT	AT	BI	ESC	PRBC	PD	SBN	TR
1. ALT	<b>0.80</b>							
2. AT	0.43	<b>0.83</b>						
3. BI	0.44	0.64	<b>0.89</b>					
4. ESC	0.21	0.40	0.54	<b>0.92</b>				
5. PRBC	0.29	0.38	0.47	0.30	<b>0.82</b>			
6. PD	0.46	0.43	0.57	0.50	0.36	<b>0.86</b>		
7. SBN	0.34	0.42	0.59	0.20	0.37	0.33	<b>0.91</b>	
8. TR	0.36	0.22	0.31	0.10	0.21	0.22	0.38	<b>0.89</b>

Note: The square root of the variance shared by the constructs and their measurements is shown by the bolded diagonal elements. The correlations between the structures make up the off-diagonal elements.

R2 is the most crucial criterion for evaluating the goodness of a model (Ringle et al., 2010). According to Cohen (1988), the R2 value of the endogenous variable should be greater than 0.26 for the good predictive power of the model. The R2 value is 0.308 for attitude and 0.661 for behavioural intention. The R2 value is shown in Figure 3. Cohen (1988) recommended  $f^2$  effect sizes of 0.02 as small, 0.15 as a medium, and 0.35 as large effects. The results indicated that the effect sizes of all significant exogenous (independent) variables range from small to large, as shown in Table IV. Lastly, we calculated Stone-Geisser's Q2 value for cross-validated predictive relevance (Geisser, 1974; Stone, 1974). The Q2 value greater than zero means that the paired relationship between the exogenous and endogenous constructs has a predictive relevance (Hair et al., 2013). The analysis result showed that the Q2 value for attitude and behavioural intention were 0.196 and 0.519, respectively. Overall, the findings validated the proposed model's structural soundness. PLS-SEM structural model analysis is shown in Figure 2. The results of the hypotheses testing are presented in Figure 3.

Table 3: Constructs reliability and validity

Attitude	0.768	0.771	0.866	0.6
Behavioral Intention	0.874	0.874	0.923	0.7
Escape	0.815	0.818	0.915	0.8
Perceived Behavioral Control	0.765	0.781	0.862	0.6
Personal Development	0.885	0.886	0.921	0.7
Subjective Norm	0.898	0.898	0.936	0.8

## 5 DISCUSSION

### 5.1 Summary of the findings

This study is a male-dominated study which is different from other studies (Holmes & Smith, 2009; Wearing, 2001), stating that females are more involved in volunteer tourism. However, the result of this survey is similar to the study of (Pompurová et al., 2020), which shows that males mostly attend domestic volunteer tourism. The survey shows that young people within the age group of 21-30 have more participation intention, and as the age increases, the intention to participate in volunteer programs decreases. The same is with the education level, most of the respondents were undergraduates, and as the qualification increases, the intention to participate in volunteer tourism programs decreases.

The current study has identified the behavioural intention of potential volunteer tourists by expanding the theory of planned behaviour (TPB). In our proposed model, eight hypotheses were supported. All three components of TPB were found to have a significant positive relationship with behavioural intention. Regarding attitude, the finding was similar to the prior tourism research examining the association between attitude and behavioural intention (Brown, 1999; Lam & Hsu, 2004, 2006; Lee & Moscardo, 2005). This study also supports the findings of volunteer tourism research that found that behavioural intention is directly influenced by attitude (Lee & Kim, 2018; Meng et al., 2020; Meng et al., 2020).

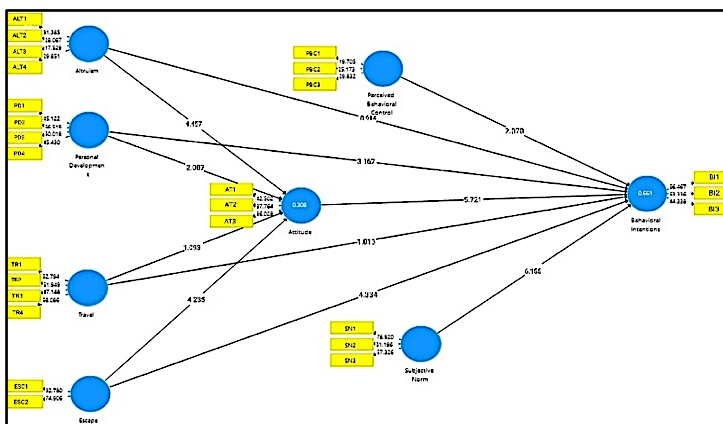
Table 4: Results of inner model

	Path Coefficients	Standard Errors	Critical Ratios	p Values	f2
<b>Direct effects</b>					
ALT -> AT	0.28	0.064	4.46	0.000	0.083
ALT -> BI	0.04	0.042	0.91	0.181	0.003
AT -> BI	0.29	0.050	5.72	0.000	0.151
ESC -> AT	0.25	0.060	4.24	0.000	0.07
ESC -> BI	0.24	0.054	4.33	0.000	0.113
PRBC -> BI	0.10	0.047	2.07	0.020	0.021
PD -> AT	0.16	0.078	2.09	0.019	0.024
PD -> BI	0.17	0.053	3.16	0.001	0.049
SBN -> BI	0.31	0.050	6.16	0.000	0.192
TR -> AT	0.06	0.055	1.09	0.138	0.005
TR -> BI	0.04	0.039	1.01	0.156	0.004
<b>Indirect effects</b>					
ALT -> BI	0.08	0.023	3.52	0.000	N.A
ESC -> BI	0.07	0.021	3.50	0.000	N.A
PD -> BI	0.05	0.024	1.95	0.026	N.A
TR -> BI	0.02	0.016	1.05	0.148	N.A

Note: Results were based on bootstrapping, all estimates were based on a one-tailed test with 95% confidence interval. N.A = f2 values were not provided for indirect effects.

Concerning the relationship between subjective norm and behavioural intention, the finding supported the previous tourism research that found that subjective norm positively impacts the behavioural intention of tourists (Lam & Hsu, 2006; Oh & Hsu, 2001). Similarly, research on volunteer tourism has indicated that subjective norm has a significant positive impact on the behavioural intention of volunteer tourists (Lee & Kim, 2018; Manosuthi et al., 2020; Meng et al., 2020; Meng et al., 2020). It is believed that volunteer tourists' participation decision in volunteer tourism programs is influenced by their close family members, friends, and colleagues.

Figure 2: PLS-SEM bootstrapping



Similarly, the volunteer tourism research also supported the finding that a positive relationship exists between perceived behavioural control and behavioural intention (Manosuthi et al., 2020; Meng et al., 2020). So, the likelihood of someone

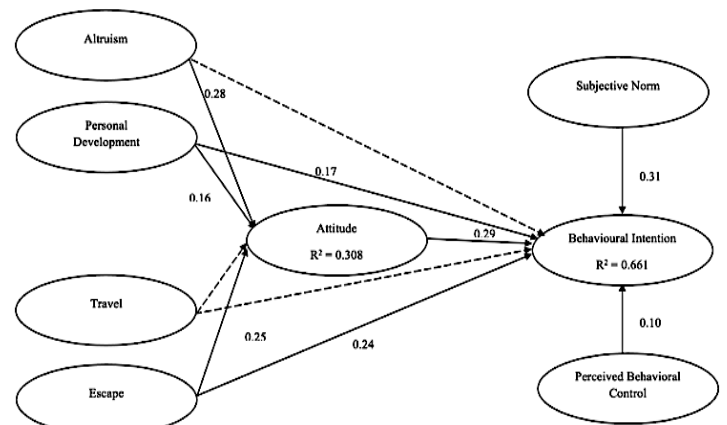
behaving in a certain way is also increased by how strongly they feel they can carry out that activity.

Regarding the motivations, the influence of altruism motive on volunteer tourists' participation intention was found to be statistically non-significant. This finding contradicts previous studies' findings, which state that domestic volunteers have altruistic motives (Pompurová et al., 2020; Rattan et al., 2012). The reason could be that respondents were from a country where most people prefer to help and support those in the local community. The same reason could be given for the non-significant relationship between travel motive and behavioural intention to participate in volunteer tourism programs. On the other hand, personal development significantly impacted volunteer tourists' participation intention. In this way, our findings supported the dichotomy between altruism and self-development, as found in earlier studies (Broad, 2003; Callanan & Thomas, 2005). Escape was also found to be a significant motivating factor for potential volunteer tourists to take part in volunteer tourism programs, as found in previous research (Knollenberg et al., 2014).

5.2 theoretical implications

Our proposed conceptual model has provided a thorough understanding of the behavioural intention of potential volunteer tourists from a developing country. Although previous research has applied the theory of planned behaviour (TPB) (Lee & Kim, 2018; Manosuthi et al., 2020; Meng et al., 2020; Meng et al., 2020), our study has identified how these three components of TPB, viz. attitude, subjective norm, and perceived behavioural control, affect potential volunteer tourists' behavioural intention for participating in volunteer tourism programs.

Figure 3: Results of the inner model



Significant path is represented by solid lines, non-significant path is represented by dotted lines.

Moreover, this study extends Ajzen's (1991) TPB model to identify the potential volunteer tourists' behavioural intentions by adding four motivations: altruism, personal development, escape, and travel. Even though past research (Benson & Seibert, 2009; Brown, 2005; Chen & Chen, 2011; Han et al., 2019, 2020; Knollenberg et al., 2014; Lee et al., 2013; Leonard & Onyx, 2009; Lo & Lee, 2011; Meng et al., 2020; Proyrungroj, 2020; Wymer et al., 2010) has identified the factors motivating volunteer tourist, but as far as the

authors are aware, none of the earlier studies has extended the TPB by adding altruism, personal development, escape, and travel to identify the participating intention of potential volunteer tourists from a developing country.

Furthermore, this study is the first to empirically verified the relationship between motivations (altruism, personal development, escape, and travel) and the attitude of potential volunteer tourists. Although the connection between attitudes and behavioural intentions is well established (Ajzen, 1991), our results showed that attitude mediated the effects of various motivating factors on behavioural intention: altruism, personal development, escape, and travel. In particular, altruism had no direct impact on behavioural intention but is still indirectly related to behavioural intention, as shown in Table IV. As a result, the present study adds to the behavioural research in the area of volunteer tourism by identifying the factors motivating potential volunteer tourists.

### 5.3 Practical implications

The findings indicated that subjective norm was the most influential factor, followed by attitude. However, the perceived behavioural control had a significant but minor impact on the intention to take part in the volunteer tourism programs. So, volunteer tourism organisers should make efforts to identify potential tourists who already have positive attitudes toward volunteering. As social pressure groups also play a significant role in shaping volunteer tourists' intentions, practitioners should try to persuade them to participate in volunteer tourism programs via subjective norms.

The volunteer tourism organisers must have a better understanding of different factors motivating potential volunteer tourists; our study has provided them with some knowledge regarding various motivating factors. Among four motivational factors, only two motivations, escape and personal development, significantly impacted the behavioural intention of potential volunteer tourists. So, volunteer tourism organisers should make packages in such a way that would allow volunteer tourists to relax and escape from their daily routine and would also give them opportunities for personal development like career development opportunities, skills development opportunities, and language learning opportunities.

In this way, volunteer tourism organisers will get help from the present study's findings to design or improve volunteer tourism programs and activities accordingly, resulting in improved volunteer tourism experiences and, ultimately, impacting the tourists' intention to take part in volunteer tourism programs. Making locals participate in their programs as volunteers increase awareness among the local people, which may impact those directly involved in policy-making (Rattan et al., 2012).

International volunteers have shown several negative impacts on the host community (Guttentag, 2009; Lo & Lee, 2011); as a result, some researchers (Guttentag, 2009; Lo & Lee, 2011; Mertens, 2022) have explained the benefits of developing domestic volunteer tourism. So it would be beneficial for the countries to know the behavioural intention of potential volunteer tourists towards volunteer tourism programs within the country to improve and stimulate volunteer tourism more sustainably. As can be seen from the study's findings, Indian citizens have a positive attitude

towards participation in volunteer tourism programs in the country, and most of the respondents were from the age group of 21-30 years, which shows the interest of Indian youth in volunteer tourism. Even though there can be a difference between what people say and do, it can be said that there is still room for the development of domestic volunteer tourism in India. So, policymakers and tourism planners in India should take the necessary steps to promote domestic volunteer tourism to encourage people of all ages to participate in volunteer tourism programs. Government play an essential role in setting the stage and enacting stimulus measures to make tourism more developed and sustainable, with the ultimate goal of local's empowerment. The government of India should organise events related to volunteer tourism programs to create more awareness by providing information related to the benefits of domestic volunteer tourism for the host community and the volunteers. Such events will not only raise awareness but will also help in preserving the host community's unique culture and heritage and will also promote sustainable development. Educational volunteer programs should be encouraged as such programs have long-term impacts on the host community, eventually enabling the local population to escape poverty (Sin, 2010). It can also be made compulsory for educational institutes to organise programs to educate and train students on how to be responsible volunteers. It is far more effective to teach local youngsters since they will be the ones to implement changes on the ground and in the political and social spheres that will last for a long time (Mertens, 2022).

### 5.4 Limitations and future research

The study has focused on potential volunteer tourists from India. Therefore, findings cannot be generalised to an overall population. Future research may focus on volunteer tourists in general. Secondly, as mentioned in the methodology section, this study used an online survey. The use of online surveys may not be the most effective method for reaching the general public, who may be interested in participating but cannot use the internet. So future research can use other techniques for data collection. Thirdly, the impact of demographic factors was not considered. Future research should also examine the differences across demographic characteristics. Fourth, the present study has considered only four motivations: altruism, personal development, escape, and travel. Some other motivations like exploration, education, and relaxation may also be considered for future research.

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# Tourists' risk perception towards Kashmir valley: An analysis using Tourism Risk Index

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## Abstract:

**Purpose:** This research aims to present a Tourism Risk Index (TRI) for risk analysis at tourism destinations that can act as a usable tool to accurately capture the perception of risk by tourists.

**Methods:** The TRI for this study is developed in Kashmir valley (India). The development of index began with the assumption that general perceptions echoed through mass media and word of mouth about the lack of security in the Kashmir valley are correct. It was followed by a survey of 370 tourists visiting the valley about common types of risks identified through the literature on tourism.

**Results:** The results are not along expected lines rather suggest that visiting tourists perceive Kashmir valley as safe. The findings show that Kashmir valley is perceived overall as less risky on all components, and in descending order, these ranks as personal safety, natural risk, cultural risk, and human-induced risk.

**Implications:** Destination managers would have promoted Kashmir valley with a different level of confidence if this insight would have been available to them, and the possibility of its positive effect on the perception of tourists not visiting the valley cannot be ruled out. The index can be used to consistently track the tourism risks of Kashmir or any other destination by inclusions of new risks as they crop up from time to time.

**Keywords:** Kashmir Valley, risk perception, risk measurement, Tourism Risk Index

**JEL Classification:** G32, D81, Z32

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## 1 INTRODUCTION

International tourism expanded after the Second World War and emerged as the world's largest economic contributor (Formica & Uysal, 1996; WTTC, 2019). The growth of tourism is attributed to the developments in global mobility resulting from advanced technology and greater disposable income (Yousaf et al., 2018). It is marked by many interruptions, mainly the oil crisis of the 1970s and the economic slowdown of 2009, albeit tourism continued to grow at a decelerated rate (Glaesser, 2006; Hall, 2010; Korol & Spyridou, 2020; Nuryyev et al, 2021; Alves et al., 2022). In the year 2020 tourism was put in reverse gear due to the COVID-19 pandemic, and by the end of the year, global tourism was reduced to 74 percent though a bounce back to

normalcy levels of 2019 is expected between 2021-24 (UNWTO, 2020).

Perceptions of risks in tourism are increasing over time, leading to more inquiry into the various types of risks (Kim et al., 2021; Yang & Nair, 2014). Perception of risks is found to be associated with the destination image (Alonsopez et al., 2022; Carballo et al., 2021; Qi et al., 2009), and the mishappenings and uncertainties at destinations activated research on risk perception. The research studies on the association between perceived risks and travel behaviour started after 1980 though in consumer behaviour the instance of risk was suggested in 1960 (Bauer, 1960) and later found place in the grand models of consumer behaviour (Engel et al., 1968; Howard & Sheth, 1969). The nature of risks and the perception of risks in tourism is different from the products as tour experiences occur at different points of time and



locations. The environment of many of these locations may not be stable or controllable thus creating uncertainties. These fluid settings make 'risk management' exciting as well as challenging for all types of destinations, especially for destinations facing uncertainties over a long period and tagged as risky.

A few earlier studies in tourism discuss risk perception (Cohen, 1972; Plog, 1974) but the later studies were more objective (Cheron & Ritchie, 1982; Moutinho, 1987; Roehl & Fesenmaier, 1992; Scholtz & De Ridder, 2021) and were referred by highly cited studies on various dimensionalities of risk perceptions (Lepp & Gibson, 2003; Sönmez & Graefe, 1998a, b). The growth of international tourism led to the spread of tourism to places with varying degrees of risk and it pushed the research agenda on risk perception beyond safe destinations to risky destinations (Fuchs & Reichel, 2006; Yang et al., 2015). The continuous occurrence of major and minor risks at destinations demands comprehensive risk management through forecasting and handling of risks followed by post risk assessment (Papana & Spyridou, 2020; Samitas et al., 2020; Spyridou et al., 2023). A proactive risk handling system or continuous risk tracking to measure and monitor risks is needed. The studies on tourism risks do not underpin the quantification of risks that can be practitioners' tool for risk management. Few research in tourism discuss the use of index as a measurement tool (Fetscherin & Stephano, 2016; Sigala & Christou, 2014; Krešić & Prebezac, 2011) however a largely acceptable model of tourism risk assessment for the use of academicians and practitioners is not available.

The Kashmir valley in India provides the 'right set of circumstances' with a mix of complex geopolitical setup and natural tourism resources to test and develop a tourism risk assessment model. The changed tourism image of the valley from a popular destination till 1989 to a place considered to be very risky is a live example of the fragility of tourist places. No Bollywood film (Hindi film) was considered complete without the backdrop of attractive and scenic sites of Kashmir valley (Bakaya & Bhatti, 2005; Evans, 2000; Taylor, 1991). However in 1989 situation deteriorated because of the Kashmir movement for independence (Bhat, 2019), and even the themes of media and Bollywood movies changed from picturesque presentation to dangerous and disturbed Kashmir (Ito & Nagar, 2017). The valley is also seen as the ground behind strife between India and Pakistan making it politically volatile, experiencing militancy, and having a consistent military presence.

The political instability in Kashmir valley prominently figures in the US and UK travel advisories against visiting the famous sites of Gulmarg, Pahalgam, and Sonmarg (Gov.UK, 2021; Travel.State.Gov, 2021). The increased risk and its perception have changed the meaning of Kashmir to the prospective tourists who may place it in the consideration set but drop it from the final buy. However, beating all odds and amidst all the din many tourists do visit Kashmir valley. An unraveling of behaviour of these tourists can provide insight into 'why tourists travel despite risks' as stated by Sönmez and Graefe (1998a) that actual travel experience with a destination provides individuals an opportunity to compare their perceptions with reality. There are many tourist places across the world having plenty of tourist resources but loosing on security or perception of security due to strife,

wars, terrorism, etc. The main research question was to deconstruct tourists' risk perception towards Kashmir valley by developing the TRI. TRI developed for this study can be customized for other destinations and used as a risk tracking measure.

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## 2 LITERATURE

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### 2.1 Risk perception and management

The concept of risk perception in leisure and tourism borrows from the literature on consumer risks and its own narrative evolved over two decades of the 1980 and 1990 (Cheron & Ritchie, 1982; Moutinho, 1987; Roehl & Fesenmaier, 1992; Richter & Waugh, 1986). Tourism risks can be absolute, real, actual, and perceived (Dickson & Dolnicar, 2004; Yang et al., 2015). Perceived risks are central to tourism research (Chua et al., 2021; Sharon & Shahrabani, 2021; Hasan et al., 2017; Yang & Nair, 2014) as it is almost impossible to determine the actual scale and range of risks in a meaningful way (Bentley et al., 2001). Evaluation of perceived risks in tourism is inherently subjective in view of possibility of an adverse event and the various misfortunes that negatively influence the attitudes towards travel behaviour (Milwood & Crick, 2021; Chatzigeorgiou & Christou, 2019; Liu et al., 2013; Quintal et al., 2010; Seabra et al., 2013; Tsaour et al., 1997). Perceived travel risk constitutes a wide array of uncertainties such as natural disasters, weather conditions, epidemics, political unrest, crime, terror activities, and wars (Mansfeld, 2006). In addition, news reports and word-of-mouth information about epidemics and terrorism at tourist destinations raise tourists' perceptions of risks (Giannopoulos et al., 2020; Garg, 2015; Neuburger & Egger, 2021; Rittichainuwat & Chakraborty, 2009).

Early studies identify perceived risks such as equipment, financial, physical, psychological, satisfaction, social, and time risks (Roehl & Fesenmaier, 1992) health, terrorism, and political instability risks (Sönmez & Graefe, 1998a). These were the first empirical studies to study in situ travel risk perceptions. These highly cited works on tourism risk formed the base for empirical analysis of risk perceptions. Tsaour et al. (1997) proposed evaluation criteria for tourism risk perception on 16 aspects related to accommodation, medical support, hygiene, law and order, sightseeing sport, transportation, and weather.

Fuchs and Reichel (2006) developed a multi-attribute questionnaire and categorized travel risk perception into human-induced, natural disasters, food safety, and service quality and measured the specific variables composing a risk construct to give a new direction for handling the problem. Law (2006) identified terrorism, disease, and natural disaster to measure the impact of risk perceptions on travel decisions. Similarly, Qi et al. (2009) developed a multi-attribute questionnaire to study the tourists' risk perception towards China and identified personal safety, cultural risk, socio-psychological risk, and violence as risk perception factors, and rated China moderately risky destination. An et al. (2010) grouped perceived risks into natural disasters, physical, political, and performance risks to study the impact of risk perception on air travel satisfaction and reuse intentions. The risks have been categorized differently in various studies; as manageable and unmanageable (Simpson & Siguaw, 2008),



natural and manmade (UNWTO, 2011). Manageable/controllable risks influence tourists more than unmanageable ones (Christou et al., 2021; Ruan et al., 2017; Yüksel & Yüksel, 2007). The different types and categories of risks only emphasize the extent of prevailing risks across tourist places of the world.

Perceived risks and uncertainties make travel buying and destination choice a complex process (Karl, 2018; Liu & Pratt, 2017; Rather, 2021; Sirakaya & Woodside, 2005) and have an inverse relationship with tourist satisfaction, word of mouth, intentions to visit and revisit a destination (Cong, 2021; Nella & Christou, 2021; Caber et al., 2020; Quintal et al., 2010; Sánchez-Cañizares et al., 2021). Tourists generally avoid destinations perceived as risky (Demos, 1992; Sönmez & Graefe, 1998b; Sönmez et al., 1999). Few studies on safety and security at touring destinations find that tourists mitigate perceived risks and develop positive attitudes towards risky destinations based on their visits (Batra, 2008; Brunt et al., 2000; George, 2010, 2003; Lepp & Gibson, 2003; Mawby et al., 2000). Lepp et al. (2011) studied risk perception in Uganda and noted the role of exposure to official tourism websites among control and experimental groups, wherein experimental group was significantly more positive with reduced perceived risk.

Present-day tourist is sensitive towards personal safety and conscious of travel risks (Liu & Pratt, 2017; Hasan et al., 2017) and perceptions of risks play a substantial role in travel destination selections (Caber et al., 2020). While it is viewed that in the absence of personal experience, individuals can easily avoid destinations they perceive as risky by choosing others they consider safe (Sönmez & Graefe, 1998a).

Risk perceptions are hazardous to destinations if not tackled properly (Pizam, 1999; Pizam & Fleischer, 2002). Risk management should deal with the risk perceptions of travelers to prevent perceived risks from escalating into barriers to tourists' destination choice (Ruan et al., 2017; Robertson et al., 2006). The negative perceptions can be mitigated through adopting proper techniques and methodology by destination management (Hajibaba et al., 2016; Liu et al., 2019, Williams & Baláž, 2015).

## 2.2 Risk measurement: Index construction

The purpose of an index is to merge several interrelated measures into a single measure (Smith, 1987). A composite indicator or index is the outcome of individual indicators that are grouped into a single index (Joint Research Centre-European Commission, 2008; Global Peace Index, 2018) and is designed through various correlated items for easy understanding of full complex phenomena rather than individual items (Greco et al., 2019; UNWTO, 2013). The indexes are a valuable tool to synthesize and understand multidimensional phenomena and are used whenever a plurality of variables is needed (Mendola & Volo, 2017; Munda & Nardo, 2005). Designing an index requires indicators and weights of these indicators (Cugno et al., 2012; Mikulic et al., 2015). The strength and weakness of a composite index is determined by the quality of variables which are based on relevance and analytical soundness (Joint Research Centre-European Commission, 2008). Index development led to the creation of two schools of thought; aggregators and non-aggregators (Sharpe, 2004). The first group supports the construction of the index and believes the

index is meaningful and easier to interpret than separate indicators. While the latter oppose and believe one should stop once an appropriate set of indicators has been created and not go the further step of producing a composite index arguing that the final product is statistically meaningless (Sharpe, 2004).

A mix of governmental-nongovernmental national-international organizations provides indexes to a complex phenomenon. Tourism-specific indexes are designed to judge the tourism destination competitiveness and destination attractiveness (Craocolici & Nijkamp, 2009; Fetscherin and Stephano, 2016; Dupeyras & MacCallum, 2013; Gearing et al., 1974; Karl et al., 2015; Krešić & Prebezac, 2011; Kaur, 1981; Lučić, 2020; Smith 1987). On the lines of tourism attractiveness and competitiveness index, TRI can support the measurement and management of tourism risks.

The TRI is based upon a survey of tourists about perceived risks at destinations during their visit and is developed after a series of validity tests. This index can be used for overtime comparison of risks and can also be expanded to other destinations by calibrating the index for destination-specific factors.

## 3 METHODS AND MATERIALS

### 3.1 Questionnaire development

The indicators for this study regarding risk perceptions are obtained from the literature (see Table 1) and 20 items were identified that were purified to ensure scale fit in the study area with the help of 5 tourism senior professors who examined the sequence, wording, and items in the scale.

Table 1: Construct and indicators

Construct	Indicators	Source
Perceived risk	Terrorism	Sönmez and Graefe (1998a)
	Unrest	Lepp et al. (2011)
	Crime	Brunt et al. (2000), Demos (1992), Mawby et al. (2000), Tsaour et al. (1997)
	Shopping	Rittichainuwat and Chakraborty (2009), Yüksel and Yüksel (2007)
	Food	Fuchs and Reichel (2006)
	Health	Sönmez and Graefe (1998a)
	Adventure	Tsaour et al. (1997)
	Sickness	Seabra et al. (2013)
	Hygiene and cleanliness	Tsaour et al. (1997)
	Natural calamities	Law (2006), Rittichainuwat and Chakraborty, (2009)
	Language	Rittichainuwat and Chakraborty, (2009)
	Requirement of traditional clothing	Based on recommendations of experts in view of nature of Kashmir valley

Few items were merged to ensure the distinctiveness of indicators, and the final 12 items were retained after items purification and pilot study. The respondents were requested to rate their level of risk perception on a 5-point scale ranging from 1 (=very low) to 5 (=very high).

### 3.2 Pilot testing: Questionnaire reliability

The reliability of the questionnaire was checked through the pilot study on 50 tourists at Srinagar and Gulmarg, Kashmir. The results of the pilot study showed measures of sample adequacy of 0.657 and Bartlett's test of sphericity ( $p < 0.001$ ,  $X^2 = 169.84$ ,  $df = 66$ ). The values conclude that items under study are reliable and have face and content validity (Malhotra & Briks, 2007). The final data was collected from the domestic and foreign tourists at the main touristic sites of

Kashmir valley; Srinagar, Gulmarg, Pahalgam, and Sonmarg. The reason for selecting these four sites as research settings is based on their popularity among domestic and foreign tourists (Rather, 2020). The data was collected in different phases of 2018 (November and December), 2019 (January), and 2019 (June-July) to maintain reliability in data.

**3.3 Sample size and data collection**

The sample size was based on the following assumptions:

- In consumer behaviour research typical range of sample size is between 300-500 (Malhotra et al., 2017).
- Statistical equation given by Yamane (1967) was applied to determine the sample size from population;  
 $n = \frac{N}{1 + Ne^2}$

Where, n= sample size, N = population which is 11,67,618, e2= margin of error i.e., 0.052 or 5%. Following these approaches the sample size of 400 was reached. The study adopted purposive sampling method and the convenience of tourists was kept in mind while collecting data. The purposive sampling method has been used by researchers in tourist behaviour studies because of the non-availability of the sampling frame (Bhat and Darzi, 2018). Each tourist was approached personally by researchers and was briefed on the importance of study and the value of feedback before getting the questionnaire filled to ensure effective responses. In all 400 questionnaires were got out of which thirty questionnaires were eliminated due to incomplete responses and the remaining 370 with a response rate of 92.5 percent were included in the study (see Table 2).

*Table 2: Respondents' profile*

Variable		Number	Percent
Gender	Male	205	55.4
	Female	165	44.6
Age	Below 20	32	8.6
	21-35	199	53.8
	36-50	98	26.5
	51-65	33	8.9
	Above 65	8	2.2
Qualification	Below graduate	53	14.3
	Graduate	164	44.3
	Post graduate	142	38.4
	Other	11	3.0
Nationality	Indian	201	54.3
	Foreign	169	45.7

The percent distribution of respondents presented in Table 2 shows a greater share of male tourists (55.4 %) than female tourists (44.6%). The majority of tourists were below 50 years (89.5 %), and domestic tourists were 54.3 percent, while international tourists were 45.7 percent.

**3.4 Data analysis**

Factor analysis using Statistical Package for Social Science (SPSS) was run to suggest the dimensionality of indicators. Confirmatory analysis and structural equation modeling (SEM) was conducted using Analysis of Moment Structures (AMOS) to measure the validity and reliability of indicators. After the preliminary tests of factor analysis and SEM, the weights of indicators were obtained to prepare TRI.

There are two types of SEM one is covariance-based (CB), and another is partial least squares (PLS) (Ryan, 2020). The study used CB-SEM to validate the dimensionality of constructs as it met the basic assumption of adopting CB-SEM, such as sufficient sample size and normality of data

(Hair et al., 2017). The data was found normal through skewness and kurtosis (see Appendix B), which is below ±3 for all items indicating normality (Kline, 2005).

**4 FINDINGS**

**4.1 Exploratory factor analysis**

Factor analysis under principal component analysis with varimax rotation was performed to extract correlated items under variant factors. This results showed measure of sample adequacy (MSA) 0.738 and significant Bartlett's test of sphericity (p< 0.001, X2= 2226.85, df= 66). The anti-image matrix showed diagonal measures of sampling adequacy were above 0.50 and limited between 0.60 to 0.90. These values suggest that the data is appropriate for further analysis (Hair et al., 2010).

*Table 3: Exploratory factor*

Factors	Human-induced risk-PR1	Personal safety-PR2	Natural risk-PR3	Cultural risk-PR4
V1-Terrorism	0.850	0.037	0.142	0.109
V2-Unrest	0.843	0.079	0.202	0.016
V3-Crime	0.807	0.035	0.143	0.144
V4-Shopping	0.621	-0.027	0.076	0.077
V5-Food	0.005	0.946	-0.017	0.056
V6-Personal health	0.013	0.944	-0.001	0.060
V7-Adventure	0.066	0.796	-0.001	-0.070
V8-Sickness	0.143	0.010	0.899	0.156
V9-Hygiene and cleanliness	0.146	0.037	0.871	0.091
V10-Natural calamities	0.217	-0.066	0.722	0.135
V11-Language barriers	0.132	-0.003	0.130	0.869
V12-Clothing	0.137	0.034	0.195	0.858
Eigen value	3.706	2.429	1.533	1.192
Variance explained	30.886	20.238	12.778	9.931
Alpha	0.808	0.879	0.822	0.741

The exploratory factor analysis reduced twelve items into four factors with eigenvalues above 1. The factor loading was suppressed by 0.50 and showed that no item is required to be deleted because all the items have loadings above the threshold value, and none has cross-loading above 0.50 (Nunally, 1978). The obtained factors explained 73.83 percent of the variance. The reliability values for all factors were checked using Cronbach's alpha, which ranged between 0.741 and 0.879 showing good internal consistency of scale (Hair et al., 2010). The results of factor analysis are presented in Table 3.

**4.2 Reliability and validity test**

Reliability and validity is assessed through convergent, discriminant, and nomological validity (Hair et al., 2010). Confirmatory factor analysis (CFA) under maximum likelihood (ML) estimation was applied to check the construct validity and reliability (Anderson and Gerbing, 1988). The goodness of fit (GOF) indexes were used to assess the quality of the four-factor model. The model has an absolute fit of values such as;  $\chi^2=117.340$ ,  $df=50$ ,  $\chi^2/df=2.347$ ,  $GFI=0.954$ ,  $AGFI=0.929$ ,  $CFI=0.969$ , and  $RMSEA=0.060$  indicating that measurement model is reasonably correct (Hair et al., 2010). This suggests that

constructs are well defined and confirms that tourism risk is multidimensional.

Table 4: Convergent validity

Constructs	SRW	t-values	CR	AVE
PR1			0.824	0.550
V1	0.88	22.439***		
V2	0.87	22.250***		
V3	0.79	18.809		
V4	0.70			
PR2			0.894	0.745
V5	0.96			
V6	0.96	29.547***		
V7	0.62	14.315***		
PR3			0.839	0.641
V8	0.94			
V9	0.82	16.517***		
V10	0.62	12.248***		
PR4			0.745	0.595
V11	0.72			
V12	0.83	7.834***		

\*\*\*=p < 0.001

The convergent validity of items is presented in Table 4. The regression weight of the items are above 0.50 (t-value >1.96), indicating that the items define each construct well (Hair et al., 2010). Further, composite reliability (CR) and average variance extracted (AVE) are above 0.70 and 0.50, respectively. Therefore these results indicate good convergent validity of the constructs.

Discriminant validity was checked to compare correlations between constructs and the square root of average variance extracted. The square root of AVE is presented in Table 5 in diagonals, and values off diagonals represent intercorrelations among constructs.

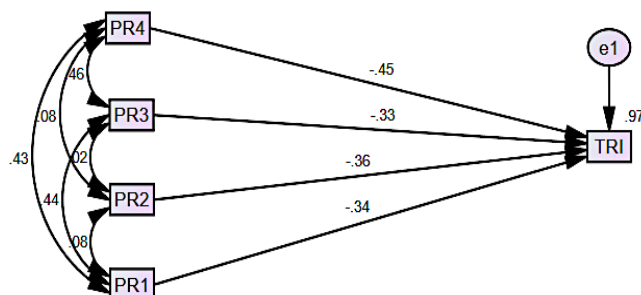
Table 5: Discriminant validity

Construct	PR1	PR2	PR3	PR4
PR1	0.742			
PR2	0.077	0.863		
PR3	0.389	0.005	0.800	
PR4	0.337	0.077	0.419	0.771

The intercorrelations between constructs were less than the square root of the AVE, thereby demonstrating that constructs are significantly distinct from one another (Fornell and Larcker, 1981). This indicates that the measurement scale met the requirement for discriminant validity.

Nomological validity is the degree to which a construct acts as expected (Bagozzi, 1980). After convergent and discriminant validity data was imputed to conduct SEM to measure nomological validity that constitute TRI. The results show four summated constructs model has a better fit of indexes ( $\chi^2=4.008$ ,  $df=3$ ,  $\chi^2/df=1.336$ ,  $RMR=0.076$ ,  $GFI=0.996$ ,  $AGFI=0.978$ ,  $CFI=0.999$ , and  $RMSEA=0.030$ ).

Figure 1: Nomological validity



The coefficient of determination (R<sup>2</sup>) reveals that the variance shared by four constructs for TRI was 97 percent (see Figure 1). The beta values of the constructs PR1 ( $\beta=-0.34$ ,  $t=-33.434$ ), PR2 ( $\beta=-0.36$ ,  $t=-41.011$ ), PR3 ( $\beta=-0.33$ ,  $t=-32.511$ ), and PR4 ( $\beta=-0.45$ ,  $t=-44.168$ ) were significant at 0.001 indicating significant association of four constructs with TRI and supporting nomological validity of constructs. The convergent, discriminant, and nomological validity indicate that constructs are valid and reliable, thus appropriate for designing an index.

4.3 Weights of indicators

The earlier applied test explained the factorization, validity, and reliability of constructs. Hence, based on these statistical inferences, it can be concluded that the present data is reasonably correct and appropriate for designing an index using variables and factor weights presented in Table 6. The weights were obtained from EFA loadings. The process includes R<sup>2</sup> of loadings following their division by eigenvalues.

Table 6: Factor and variable weights

Variables	PR1	PR2	PR3	PR4
V1	0.28	0.00	0.01	0.01
V2	0.27	0.00	0.02	0.00
V3	0.25	0.00	0.01	0.01
V4	0.15	0.00	0.00	0.00
V5	0.00	0.37	0.00	0.00
V6	0.00	0.37	0.00	0.00
V7	0.00	0.26	0.00	0.00
V8	0.01	0.00	0.36	0.02
V9	0.01	0.00	0.34	0.01
V10	0.02	0.00	0.23	0.01
V11	0.01	0.00	0.01	0.47
V12	0.01	0.00	0.02	0.46
Total	1.00	1.00	1.00	1.00
Factor weights	0.29	0.27	0.25	0.18

Tourism Risk Index (TRI) is developed using the following statistical formula:

$$\sum_{i=1}^n \alpha_i \bar{X}_i$$

Where,  $\alpha_i$  indicates variable weight  $\bar{X}_i$  is indicates the mean of the variable. The TRI is based on the assumption that the weights of variables under the factor should equal 1 (Krešić & Prebezac, 2011). The unrepresented weights are referred to as residuals, allowing the sum of correlated variables to be equal to 1. The residuals to each factor were low even factor PR2 has no residual indicating that identified variables are reasonably related to the corresponding factor.

4.4. Tourism risk index

The TRI is presented in Table 7. The index of four indicators is developed by multiplying variable weight with the mean of the corresponding variable and summing these values as suggested by Joint Research Centre-European Commission (2008). The four sub-indexes were used to define the overall aggregated index. The overall aggregated index value (TRI=2.745) is taken as a benchmark value to judge high and low perceived factors.

According to the TRI, four factors have values below aggregated index value. Cultural risk has the lowest value

(TRI=2.313), and the risk items associated with cultural risk were perceived as almost equal. The next factor having lower index value is the human-induced risk (TRI=2.391), and among the items of these factors cheating in shopping was perceived as high. The next factor having low index value is personal safety (TRI=2.597), and almost all items associated with personal safety were rated equally. The next factor with an index value below aggregated value is natural risk (TRI=2.665); among items associated with the corresponding factor, natural calamities is rated high. The index value of these factors against aggregated index suggested that the presence of risks associated with these factors were perceived as low by tourists at the destination.

Table 7: Tourism risk index

Indicators		Weights		Mean	TRI values
		Variable	Factor		
PR1	Human-induced risk		0.29		2.391
V1	Terrorism	0.28		2.384	0.668
V2	Unrest	0.27		2.397	0.647
V3	Crime	0.25		2.141	0.535
V4	Shopping	0.15		2.795	0.419
R1	Residual	0.05		2.492	0.121
PR2	Personal safety		0.27		2.597
V5	Food	0.37		2.584	0.956
V6	Health	0.37		2.603	0.963
V7	Adventure	0.26		2.608	0.678
R2	Residual	0.00		-	-
PR3	Natural risk		0.25		2.665
V8	Sickness	0.36		2.659	0.957
V9	Hygiene and cleanliness	0.34		2.697	0.917
V10	Natural calamities	0.23		2.816	0.648
R3	Residual	0.07		2.043	0.143
PR4	Cultural risk		0.18		2.313
V11	Language	0.47		2.303	1.082
V12	Clothing	0.46		2.324	1.069
R4	Residual	0.07		2.314	0.162
Aggregated Tourism Risk Index					2.745

## 5 DISCUSSION AND CONCLUSION

Global tourism had consistently grown over time except in the year 2020 when an unseen bio-risk of COVID 19 stopped everything for almost a year. This risk has been unprecedented, but the global environment always remains in a state of change, with different natural and manmade risks coming up from time to time. Managing all risks effectively is key to successful tourism destination management though the complexity of situations at certain times may not present a viable solution. Measurement and quantification of risks in such cases can be a useful aid in finding solutions. Disaster management focuses on measurement and establishing levels of risks, so that affected persons to make informed decisions about their behaviour choices.

The literature on tourism needs to borrow and learn from here for tourism risk assessment. Travel alerts and advisories assess risks, but these are generic in nature and sometimes not appreciative of cultural differences. These are often contested by host destinations and the development of an objective measure can be very valuable for hosts, tourists, and destination managers.

The TRI developed through this research establishes that image of Kashmir as a risky place among prospective travelers is not accepted by the tourists after actual tour experiences who find Kashmir valley a safe tourist destination. However, the components of risks are rated

differently in terms of safety. The findings show that Kashmir valley is perceived overall as less risky on all components, and in descending order, these ranks as personal safety, natural risk, cultural risk, and human induced risk. The results of this study are validated by the findings of previous studies stating that tourists perceive low risks at risky destinations that have general perceptions of not safe (Lepp et al., 2011; Fuchs and Reichel, 2006; George, 2010; Qi et al. 2009). Among different factors of risks in this study, the variables cheating in shopping and natural calamities are perceived as high risks that relate to the outcomes of Yüksel and Yüksel (2007) and Rittichainuwat and Chakraborty (2009) studies that also find cheating in shopping against tourists is a common practice at tour destinations. Further, the findings about the high perception of natural calamities relate to Gani et al. (2021), Shah et al. (2018), and Yousuf et al. (2020), which consider Kashmir valley risky because of its geographic location. The results of this study are along the lines established through earlier studies at other destinations but divert from the common perceptions echoed through media and word of mouth. The opinion of the tourists is influenced by these easily available inputs that can be challenged through the scientific approach of preparing quantitative TRI.

TRI can be customized for destinations by factoring local issues. This can find the application on a longitudinal basis to generate continuous data, and in that case, moving TRI can be prepared by following the moving average method rather than one point measure. TRI is a dynamic tool where variables change with the change in the situation, and its application at different destinations in a broader set of data is likely to make it more robust. The TRI bridges the gap between perceptions and reality for better destination management strategies.

### 5.1. Implications

Risk assessment and mitigation have become more valued post-COVID-19 experiences. Live data is needed for decision-making by visitors and destination managers. A programme can be developed to use live survey data to provide continuous TRI.

TRI developed through this study can be a potential tool to measure travel risk at a destination in totality and on different components of risk. This can also act as a comparative scale for evaluating risk across destinations and at different times. Continuous assessment of risks using this index can act as a live tracker for the different stakeholders; tourists, industry, and the government.

The present index is designed with rigor regarding reliability and validity, considering that a scientific approach to risk management is more important than generic perceptions of risk. TRI is simple to develop and understand that can be used in academics and industry with equal efficacy.

The TRI is based on important tour-related variables at a destination, which can change over time and place, thus making the index dynamic in nature. TRI will evolve with its application at different destinations and may also become standardized to some extent.

The quantitative assessment of tourism risks can be very useful for destination managers, as it will enable them to identify risks along with their intensity at the destination. TRI can act as a powerful feed-forward tool to proactively make

desired interventions to minimize the perceived risks of tourists.

The quantification of risks using TRI can also eliminate the influence of cross-cultural perceptions in risk assessment in travel advisories as tourists at the destinations can provide accurate inputs about ground realities.

## 5.2. Limitations and future research directions

The study has a few limitations. First, the study relied on cross-sectional data and was limited to tourists only. Other important stakeholders such as tour guides, hoteliers, and travel agents were not involved in the study. Future research can study risk perceptions through a multi-stakeholder perspective such as service providers and resident community using longitudinal research to generate data for better results. Second, the study adopted the purposive sampling method due to the non-availability of the sampling frame. Only available and accessible respondents were selected, which might have excluded some experienced respondents. Thus, future research should adopt random sampling methods to reduce selection bias.

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**Appendix A: Questionnaire**

Please rate the tourism risks of Kashmir valley based on your current tour experience and you can rate your response from 1 to 5 where 1= Very Low and 5= Very High

Risk Perception	1	2	3	4	5
Risk from terrorism					
Risk from unrest					
Chance of crimes against tourists					
Cheating in shopping					
Risk to personal health of tourists					
Chances of sickness					
Hygiene and cleanliness risks					
Possibility of natural calamities					
Safety in adventure tours					
Language barriers					
Requirement of traditional clothing by tourists					
Level of adaptability of Kashmiri food					

**Appendix B: Statistics for the data collected**

Item	Mean	Standard deviation	Skewness	Kurtosis
Natural calamities	2.816	0.990	0.106	-0.430
Shopping	2.795	1.118	0.135	-0.609
Hygiene and cleanliness	2.697	1.004	0.216	-0.469
Sickness	2.659	1.014	0.298	-0.372
Adventure	2.608	0.957	0.183	-0.037
Personal health	2.603	0.955	0.361	0.148
Food	2.584	0.977	0.369	0.019
Unrest	2.397	1.010	0.314	-0.486
Terrorism	2.384	1.035	0.431	-0.429
Clothing	2.324	0.983	0.469	-0.511
Language barriers	2.303	1.090	0.526	-0.474
Crime	2.141	0.983	0.661	-0.018





## CASE STUDY

# The debt crisis and the adoption of Asset-Light and Fee-Orientated (ALFO) arrangements at Marriott: 1980-1995

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## Abstract:

**Purpose:** This case study examines Marriott Corporation's large and successful spinoff between 1993 and 1995 and the concomitant adoption of a corporate ALFO strategy enabled by the transfer of assets and debt between the two entities. As an example of corporate restructuring, it involves changing ownership, operational structure, or business activities within a corporation in order to improve shareholder performance.

**Methods:** Key directional changes in Marriott's history that have changed the structure of the business is used to examine the spinoff and ALFO strategy adaptation.

**Results:** Marriott have been characterised by a small number of significant and foresightful innovations. There was a great deal of importance attached to the company's move away from food service and towards accommodation in the future. During the early stages of the company's existence, the company was located near Marriott's Bethesda headquarters and was headed by the founder's oldest son. There is no doubt that these investments have been probing in nature in the recent past, but they are significant in terms of scale and commitment in the future.

**Implications:** Marriott's success can be attributed to the fact that the company has a flexible corporate strategy that focuses on high growth and high yield business opportunities, as well as the willingness to dispose of assets that don't provide this outcome. As a result of this focus, the company was able to grow globally from the 1990s onwards. Ultimately, it can be said that the company's success can be attributed to the fact that it has adapted appropriately and successfully to changing operational and industry realities over the course of many decades, especially as exigencies in the asset and debt markets rendered the portfolio structure it had developed over so many decades unsustainable.

**Keywords:** Business history, Capability development, Lodging industry, Financing models

**JEL Classification:** B1, N80, Z30

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## 1 INTRODUCTION

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Marriott Corporation could be considered a modern iteration of a Chandlerian great American enterprise (Chandler, 1992). Today, Marriott is one of the world's largest lodging providers. In harnessing the economies of scale and scope available to it, and in assiduously building entry barriers to protect economic rents, Marriott Corporation is an exemplar of how a firm in a competitive industry can achieve long term corporate growth and sustained competitive advantage.

Marriott's successes can generally be attributed to its leadership of significant sectoral innovations within the lodging industry, both in relation to marketing strategies but also relating to capital structure reform (Marriott & Brown, 2013). The growth of Marriott over its more than 90-year history shows more evidence of an ability to radically reframe these marketing strategies and capital structure at key historical junctures, rather than an accumulating commitment to a singular strategy more common in the examples of Chandler. As such, Marriott provides an exemplar of an agile organisation that has been able to actively, and with great foresight, manage the emergence of its unique resources and organisational capabilities.

Marriott pioneered the Asset-Light and Fee-Oriented (ALFO) strategy, now almost universally applied in the global hotel industry. By divesting ownership of hotels and relying on franchising and management contracts, the brand expanded to become the world's biggest hotel chain. In terms of the ongoing business relationships associated with the ALFO arrangements, Marriott collects fees for use of its brand, marketing, and reservation systems from hotel owners. Franchisees pay an initial fee for the right to use the Marriott brand, plus ongoing royalties and other fees. Franchisees (or their subcontracted agents) are responsible for day-to-day operations, while Marriott provides support services.

For Marriott, advantages of the ALFO strategy include reduced financial exposure to real estate and asset depreciation, leveraging of local expertise during geographic

expansion, and lower direct labor and capital costs. Potential drawbacks for Marriott include failure to adhere to standards by franchisees who are beyond the direct contractual control of the firm, and potential franchisee financial instability. Overall, however, the adoption of an ALFO strategy has been a source of significant success for Marriott, allowing the firm maintain profitability during periods of tourism sector contraction while growing a global portfolio of locations with relatively modest capital outlays (García-Gómez, Demir, Díez-Esteban & Bilan, 2021).

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## 2 CORPORATE RESTRUCTURING, SPINOFFS AND VALUE CREATION

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This paper investigates a large and successful spinoff conducted between 1993 and 1995 by Marriott Corporation and the concomitant adoption of an ALFO strategy that was facilitated by the sequestration of the assets and debt from one entity to another (Fernández-Barcala, González-Díaz & López-Bayón, 2022). It is an example of corporate restructuring which aims to improve shareholder performance through the change in ownership, operational structure, or organization of certain assets or business activities within a corporate entity. Types of restructuring include mergers, acquisitions, divestitures and spinoffs (Chon & Singh, 1993; DePamphilis, 2019; Korol & Spyridou, 2020; Nuryyev et al, 2021; Papan & Spyridou, 2020; Giousmpasoglou & Dinh, 2022).

A spinoff occurs when assets or operations are transferred to form a new, generally independent entity. Both entities emerge with separate management teams, board of directors if applicable, and shareholders (Garvin, 1983; Misirlis et al., 2018; Capone, Malerba & Orsenigo, 2019; Samitas et al, 2020; Spyridou et al, 2023). Spinoffs have been a popular restructuring method adopted in many jurisdictions, and studies often, albeit not universally, show that they create value for both the parent company and the new entity's shareholders (Aggarwal & Garg, 2019).

While spinoffs and mergers are mirror images of one another, both are mooted to create new shareholder value. In the case of mergers, benefits are said to accrue from scale or scope economies, or other forms of synergies between entities (Daley, Mehrotra & Sivakumar, 2007; Vassiliadis et al, 2013; Vlastic et al., 2019). By extension, for spinoffs, it would be assumed that these benefits are absent from the initial entity, or that any benefits that do exist do not compensate for the coordination costs involved in managing the diverse portfolio of businesses (Cusatis, Miles & Woolridge, 1993; Hubbard, Rice & Galvin, 2015; Priporas et al, 2018; Chatzigeorgiou et al., 2019; Nella, A., & Christou, 2021).

One common explanation for the success of spinoffs is that they provide the dual (or multiple) post-transaction entities with greater strategic focus. This strategic focus may incline the entities to greater clarity and purpose with regards to the development and deployment of a successful strategic plan. Relatedly, problems may be evident when diversified firms attempt to co-specialize in even complementary strategic arenas due to a variety of factors, including historical path dependencies inclining thinking and resourcing towards one over the other, capital resourcing asynchronicity and boundedness (the notion that organizational units tend to look first to their own operational and strategic imperatives before considering wider effects (Sigala et al., 2002; Schmidt & Braun, 2015).

Strategic management thinking is fundamentally focused on both the internal organisation and the external competitive environment. As part of the dynamic-capabilities view (DCV), firms build, integrate, and reconfigure their resources based on path-dependent processes to adapt to changing environments (Teece, Pisano, & Shuen, 1997, Makadok, 2001). By adapting to changing competitive conditions within their competitive milieu, firms can adapt to changing competitive conditions. Conceptually, the DCV is complementary, but independent to, the resource-based view (RBV) (Winter, 2003) due to its focus on dynamism internally and externally (Galvin, Rice & Liao, 2014; Christou et al., 2021). As a processual model, the DCV is evolutionary in nature, opposed to the innate static nature of the RBV.

At its most generally applied level, the DCV provides a basis for understanding how these resources are built and evolve over time. As applied to corporate strategy generally, and diversification in particular, the DCV focuses on the dual elements of related versus unrelated diversification (with the former preferred due to the capacity of firms to leverage capabilities in closely related competitive domains) and also capability surplus, in whole or in part, facilitating the extension of the organisation's operational focus with relatively low real and encountered costs (Schmidt & Braun, 2015).

This paper builds on the DCV to examine, in long view, significantly capability transformations undertaken by Marriott over its lifetime as a hospitality and lodging provider. In a practical sense these strategic changes were only possible through the decoupling of the major asset and debt bundles from the more entrepreneurial and fast moving consumer-focused business activities. It is framed primarily as a case study, but with reference to relevant extant theory both to contrast Marriot's approach with orthodox theory and

also to examine how it has been an exemplar of capability-driven success.

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### 3 MARRIOTT - THE EARLY DAYS

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The corporation's founder, John Willard Marriott, was born in rural Utah in 1900 (O'Brien, 1977). His family were farmers, and Bill (as he came to be known) was raised tending sheep and other animals. It was a simple, frugal and austere existence, and Bill was entrusted with significant responsibilities from an early age (Gregersen & Black, 2002; Marriott, 2013).

Like most residents of Utah (then and now) the Marriotts were Mormons. Like all religiously attentive male Mormons who were able, Bill undertook a two-year, unpaid mission in New England in the north-East of the United States. Returning to Utah's State capital - Salt Lake City - in the summer of 1921, he passed through Washington, D.C., the nation's capital. While there:

*"... [H]e walked from Capitol Hill to the Washington Monument, toiled up the steps to the top, walked back down again, and strolled over to the Lincoln Memorial. Everywhere he went tourists and pedestrians sweltered and sweated in the sultry, humid air. On the way back to his hotel, he just stood there in the street watching the crowds, he couldn't get over it: a push cart peddler would come along the street selling lemonade and soda pop and ice cream, and in minutes he would be cleaned out and on his way to stock up with another cartload"* (O'Brien, 1977, p. 87).

Bill's innate entrepreneurial tendencies were sparked. After returning to Utah to study (he graduated from the University of Utah in 1926) and to marry his bride Alice, he returned to Washington, D.C. in 1927. Almost certainly driven, in whole or part, by his early rural poverty, he saw opportunities to develop a new business that would create wealth for his family's future.

Specifically, he noticed back home in Salt Lake City that customers were lined up to buy A&W root beer. This sweet beverage that does not contain caffeine (a stimulant banned by the Mormon church) was not available east of the Mississippi River – a region that contained most of the nation's population. If A&W was that popular in Utah, perhaps it would be popular in Washington, D.C. too.

Bill became the main franchisee to sell A&W root beer in Washington, D.C., and founded a root beer shop with nine stools. In the cooler weather, Bill's wife, Alice, began selling Mexican food she had learned from the nearby Mexican embassy. There were soon two more locations of The Hot Shoppes, which were dubbed 'The Hot Shoppes'.

Early on, Bill learnt something of entry barriers and idiosyncratic resource assemblage. As is the case today, American carbonated soft drink firms relied on local franchisees with exclusive production and distribution arrangements to incentivise local sales efforts. The rights to market A&W within the capital region provided a surety that Marriott's efforts in building the business could not be countered by similarly entrepreneurial minded food providers.

The good times, however, were not to last. The Great Depression hit in October, 1929, and Marriot lost his three stores and his life savings when his bank went bankrupt.

Irrepressibly he soon opened two more and then many more around Washington, D.C. In 1932, Bill and Alice had the first of their two children, also named John Willard and also to be known as Bill (henceforth denoted Bill Snr and Bill Jnr). Ever the entrepreneur, as the Hot Shoppes grew, Bill Snr looked for opportunities to diversify and started selling boxed lunches to airline passengers in 1937. Marriott's fast-food restaurants boomed during and after World War II, when millions of well-paid workers flooded into the country.

Hotel accommodation was Marriott's first diversification in 1957. Located just outside Washington, D.C., in Arlington, Virginia, the Twin Bridges Marriott Motor Hotel had 365 rooms with two double beds and a television. At the time of its establishment, this was one of the largest hotels in the country. As the Cold War took hold in post-WWII America, both the Pentagon (the first headquarters of the US military) and Washington National Airport were in the process of growing as the Cold War took hold.

When categorising this primary diversification in the corporation's history, it can be seen as radical in terms of operations, but less so in terms of issues like geography and customer knowledge. The new hotel was some ten miles from Marriott's Bethesda headquarters, facilitating close and direct monitoring of the business by senior management. As a preferred provider of accommodation for the corporation's own burgeoning workforce visiting Bethesda, strong occupancy was also guaranteed. As such the move into accommodation services was, in hindsight, rather low risk for the company.

During Marriott's early years, the company made two major sectoral diversification decisions, from fast food to airline catering, and then to accommodation. After years of being a fast food company, the company made a major move by diversifying into accommodation. Indeed, the accommodation diversification can be seen, in hindsight, as a risky venture for the company.

The new accommodation venture was entrusted to Bill Jnr, who was at the time 25 years old.

Bill Snr was a tough boss for Bill Jnr. In an interview in 2013, Bill Jnr said of his father:

*"He was an interesting mentor in that he would rarely praise. Nothing was ever good enough. He was a perfectionist, and very critical, very tough. He would never really come right out and tell me what I ought to do. He tried to make me figure out what I should do"* (New York Times, 2013).

Bill Snr's wife Alice played a strong part in clearing the way for Bill Jnr's emerging leadership role, both in 1957 (when he was appointed head of the nascent hotels division) and also in 1964, when Bill Jnr became President of the rapidly growing Marriott Corporation at the age of 32, and in 1972 when he became CEO.

During the 1950s and 1960s, steady growth was evident. The Hot Shoppes operated 45 stores and four hotels in 1964. A catering business in Venezuela was purchased by Marriott in 1966, marking Marriott's entry into the international market. A New York Stock Exchange listing occurred in 1968. A quadrupling of the company's size occurred between 1964 and 1970.

#### 4 BILL JNR'S LEADERSHIP YEARS

With the advent of conventions in the 1970s and airline travel in general, Marriott's accommodation business focused on two related and emerging trends. Among the former is the Marriott in Atlanta's upmarket Buckhead district - a convention hotel with 349 guest rooms and 30,000 square feet of convention space, and among the latter is the Los Angeles Airport Marriott, which opened in 1973 with 1004 guest rooms.

As such, growth was the new aim for Marriott Corporation. Bill Jnr's ascendancy to the CEO role marked a change in Marriott Corporation's attitude to both growth and debt. Bill Jnr began raising bank loans and corporate debt to expand the company, perhaps prompted by Sheraton's and Hilton's expansion. Marriott had a history of mortgaging individual properties prior to Bill Jnr's appointment, which limited the corporation's liability in the event of financing problems. Due to his desire to grow rapidly, Bill Jnr left much of his father's legendary caution behind.

In 1971, at the beginning of Bill Jr's tenure, the company was divided into three divisions, namely food operations, catering to airlines, and hotels. The Corporation spent \$3 billion in new capital during the 1970s' in order to expand its hotels division aggressively, with room numbers increasing by 17% each year. It was the first time that sales exceeded \$1 billion in 1977

Marriott also diversified into related tourism sectors - generally with little success. Bill Jnr noted one of his worst decisions was to enter the cruise line industry:

*"... one of the biggest ones was when we bought Sun Line Cruise Ships back in 1973. The mistake we made, we hooked up with a Greek partner who only could run the ships in Greece. That was about a 6-month season. He tried to get into the Caribbean but couldn't on a regular basis. It was the right time to enter the cruise ship business, because 1973, '74, Carnival [Cruise Lines] was just starting up. We would've done great if we had had a partner who wanted to work the ships in the Caribbean, but we didn't. As the story goes, the Greek Cyprus war broke out a year after we bought this company, and our cruise ship was sailing into port as he sat at his Athens office. He was asked what he should do by the captain. I just got a call from the army, he said. Our ship is to be commandeered for troop transportation. War will be short. Call me later after you sail the Aegean Sea for another couple of days.*

*By the time the ship got back into port, the war was over, the Greek government never took his ship, but it was that kind of a mess we had on our hands with this Greek partner who just wasn't able to have a vision outside of Greece. And had he had the vision to really organize and locate the ships in the Caribbean, we would have had a fantastic business today, and we missed that opportunity."* (Marriott, 2009).

In the wider US economy, other storms were brewing. During the 1970s, America faced an 'energy shock', and in 1979 President Jimmy Carter encouraged everyone to do what they could to save oil. Marriott's hotels depend on people flying and driving, and a downward slide in travel has negatively affected the company. During the early stages of Ronald Regan's presidency, the economy soon recovered, airlines deregulated, and more Americans travelled for holidays. A

combination of government stimulus policies and lower taxes led to an economic boom that put Marriott's hotels at an economic disadvantage.

Bill Jnr, ever the optimist, saw new opportunities in the early 1980s. Real estate investments became more profitable in 1981 after the Economic Recovery Tax Act 1981 allowed investors to write off \$9 of their investments for every \$1 invested in new projects.

These tax changes, and general economic buoyancy in the US, led to significant supply-side changes in the availability of hotels, resorts and convention accommodation. Marriott was a key player in this investment boom, but not the only player, and its competitors also added significant new capacity in the first half of the 1980s. Marriott also moved to create new product categories or service/price segmentation within its portfolio (the mid-priced Courtyard hotels were launched in 1983) that were developed using partnerships with property investors (Wind, Green, Shifflet & Scarbrough, (1989).

In 2009 (Marriott, 2009), Bill Jnr was quoted about the Courtyard hotels launch:

*"[In 1983] we decided that we could go into what we called the limited-service business, which was a small hotel. I was opposed to it; I didn't understand it. None of the big hotel chains were doing it. Everybody was either building big box hotels like this or they were building roadside motels. We went out to our customers and we said, what do you really want in your next hotel stay? They said, 'a better room at a lower price'. And I said to our people, you mean we spent a million dollars in research to find out – [laughter] – that people want a better room at a lower price? And they said, yes.*

*So we designed a little hotel with no meeting space, very limited restaurant service, no bell service, no room service. It was called Courtyard. It was a lower-priced hotel and a great room, and we've got 800 of them now, and all the other hotel chains have followed us into this segment".*

The corporation also borrowed heavily to acquire restaurant chains (Gino's in 1982) and smaller competitors (for example, the Howard Johnson chain of hotels and restaurants was acquired in 1985 after a bidding war against three other suitors).

Marriott also moved into timeshare – a business model where customers buy certain weeks use of a property within a year, shared with others, while also paying maintenance costs to the parent manager. This became an important and profitable element of the Marriott business.

In 2013 (Marriott, 2013), he noted of those years:

*"Marriott had to transform itself into a deal-savvy organisation. Once again, our "order" adapted to the change. We found ourselves easing into the let's-make-a-deal mindset that characterised much of 1980s business. Our legal and finance departments quickly mastered the intricacies of syndications, limited partnerships and other real estate investment vehicles.*

*Large-scale deal making meant debt. My father [Bill Snr] had always viewed debt as an evil to be avoided at all costs. ...Borrowing money was anathema. But to achieve the magnitude of growth that would move Marriott to the next level, debt financing was vital. I talked; he listened; he grimaced; I borrowed".*

The 'magnitude of growth' that Bill Jnr refers to was known as the 20:20 rule. Marriott sought to grow revenues by 20 percent per annum while retaining 20 percent returns on equity. This growth was possible off a small base in the 1970s, but as Marriott grew larger and larger, maintaining this compound growth was a challenge (Kennedy, 1988).

In hindsight, much of the debt-fueled success of the 1980s was illusory and destined to end in a crisis. On Monday 19 October, 1987, (Black Monday) the US stock market fell 22.6%, with the drop more acutely experienced by firms that were heavily indebted and held illiquid assets, like Marriott (Amihud, Mendelson & Wood, 1990). The problems became serious in 1990 as many doubted the firm would survive, and the share price dropped from around USD33 in early 1990 to a low of USD8.375 in October of the same year.

The growth at all costs mantra had caught up with the company, as Bill Jr later noted (Marriott, 2009):

*"Well, we got going in the '80s primarily. We were building hotels and selling them to investors. We sold them to limited partnerships, we sold them to the Japanese, we sold them to big insurance companies, and – when the crash came in 1990 in the real estate business – we had about \$3 billion worth of hotels on our books that we couldn't sell. We had contracts, the contracts were broken, the people walked away from them. We had about \$300 million of cash flow to service \$3 billion of debt. We were in trouble, we really were.*

*Bill Shaw did a great job as our CFO back then, of really hunkering down, and we got enough cash out of the company to keep going, and worked it out with the banks and we were fine. But that was really a scary, concerning time. We had the Gulf War going on, people stopped traveling, we had a recession, and we had the real estate bust."*

The debt troubles had shaken Bill Jnr. He suffered two heart attacks in late 1989, perhaps in part due to pressure emerging from the company's debt troubles. In turn he looked for new ways to grow that did not involve owing billions of dollars to bond holders and banks. Various restructuring strategies were adopted by the company to reduce costs and maintain growth. Reducing capital expenditures, streamlining administrative processes and downsizing the company were some of the most important strategic actions. It was, however, a significant innovation in the way the business was structured, the first of its kind at the time. .

Marriott would develop hotels with investors' funds, transfer ownership but retain the rights to manage the hotel businesses. This reduced the capital invested by Marriott, but ensured that which was invested maintained high returns. Also, Marriott would seek to move the physical assets on its books – and the related debt – to a new business .

Bill Jnr saw the opportunity to grow the business by separating the develop/build/own functions of the business and the management of the hotels, harnessing this flood of money into real estate development . In hindsight, this structural separation of complex and hitherto integrated corporate activities was a fundamentally important development for Marriott.

Contemporaneous accounts (Wayne, 1985) show both the corporate commitment to this approach, and the differentiation this commitment provided for Marriott:

*"Marriott sets itself apart from its industry through its clever use of financing, which results in Marriott typically managing its hotels, but not owning them. Other hotel*

*companies have used similar financial strategies to reduce risk, but none so aggressively as Marriott, which sells most of its hotels to outside investors and then manages the property under a contract. This has given Marriott a way to flatten the curves of a cyclical business and generate cash for capital-intensive projects”.*

Extending this process further, the company rehired former SVP of finance Stephen Bollenbach as its new CFO in early 1992 with a view to further financial and structural adjustment. Bollenbach was known for his financial restructuring skills, and had delivered similar arrangements in previous firms. Bollenbach’s finance team devised Project Chariot using a corporate spinoff strategy.

Project Chariot and the separation of the corporation into two related entities was the basis of significant litigation soon after its announcement. Put simply, bondholders who had purchased debt securities issued by Marriott felt deceived inasmuch as they had not been informed that much of the income generating activity of the corporation was to be hived off into a separate legal entity. The judgement in one case (among around 20) is informative of the internal discussions and activities within Marriott during the first half of 1992 (PPM America, Inc. v. Marriott Corp., 853 F. Supp. 860 (D. Md. 1994),

*Bollenbach became Marriott's Chief Financial Officer (hereinafter "CFO") on March 1, 1992. Plaintiffs contend that Bollenbach was hired by Marriott for the purpose of developing a plan whereby Marriott might dispose of its depressed real estate holdings. It is undisputed that Marriott's strategy throughout the 1980's was to purchase real estate, build hotels on the real estate, and then sell the hotel properties while retaining management contracts. The parties agree that Marriott's strategy of selling real estate while retaining management contracts was well publicized and was well understood by the securities markets. The parties further agree that this strategy, which had served Marriott profitably through the 1980's, began to falter in 1990 when the real estate market became depressed and Marriott could no longer easily dispose of its real estate holdings.*

This assessment by Judge Alexander Harvey II is supported by contemporaneous media reporting on the role of Bollenbach. The judgment goes on to note:

*In January of 1992, Marriott began to court Bollenbach, an acknowledged expert in the field of corporate restructurings. In the late 1980's, Bollenbach had successfully engineered a number of major restructurings.*

Bollenbach had recent experience in the hospitality sector and had facilitated a similar transaction at his previous employer, Promus Corporation, that had seen a split of high yield/growth businesses from low growth real estate assets with related debt liabilities into two legal entities.

The judgment goes onto note that:

*On February 13, 1992, Bollenbach met with Matthew J. Hart, Marriott's Treasurer. They discussed the problems being encountered by Marriott in its efforts to sell its real estate properties. Hart indicated that he intended to assign various Marriott individuals to analyze various possible solutions, and Hart and Bollenbach at this early date discussed the possibility of a "spin-off" of Marriott's real estate. Bollenbach officially began working for Marriott on March 1, 1992.*

Subsequently, Marriott separated into two businesses in 1993 – Marriott International Incorporated (MII) and Host Marriott Corporation (HMC). MII was scoped to manage or franchise over 750 hotels, inns and senior living communities, while also delivering food catering, facilities and vacation timeshare management operations.

The outcome of Project Chariot, finally delivered after the transactions completed in 1995, was successful beyond the expectations of Marriott. While much can be attributed to contextual improvements exogenous to the plan, the arrangements showed a degree of perspicacity in relation to how and when the US economy would improve.

First, the US economy was showing clear signs of recovery by 1995, with this seen in the valuations of Marriott’s real estate division. By the time the spin-off transaction was finalised, real estate assets had returned to pre-recession valuations. Second, the spin-off provided an exit strategy for management from what was innately an over-complex business spanning real estate development, real estate asset management and hotel operations. By allowing management time to focus solely on the core hotel management business, there was evidence that performance in this area would benefit. Furthermore, the new entity, Host Marriott, was seen as appealing to investors in real estate assets as the underlying market for these improved.

Finally, the combined debt/equity ratio was optimised through the transaction across both businesses. Prior to the spin-off debt levels had reached USD4.8 billion, and debt/equity was around 40%. As the spinoff concluded, debt was reduced to around USD3.3 billion, with most held by Host Marriott, but given sectoral norms in the REIT industry, at comfortable levels. This in turn allowed Host Marriott access the debt capital markets at lower rates while allowing Marriott International to focus on opportunities associated with global brand expansion (Parrino, 1997).

In the other spun-off business, HMC would own 141 hotels and 16 senior living communities, continue the operations of its Travel Plaza business, and manage the delivery of real estate holdings and development projects. HMC was seen as a property company, with stable returns, and MII was seen as a vehicle to develop and leverage Marriott’s hotel management capabilities.

An example of the high-yield businesses developed within MII was Marriott Vacation Club International (MVCI). Marriott had been working in the timeshare sector for some time, but in 1995 this division was created to develop and market timeshare arrangements. This element of the business grew strongly, and was eventually spun off itself in 2011 as Marriott Vacations Worldwide Corporation.

Importantly, HMC had total real estate holdings to the value of \$3.3 billion, with 60% of these holdings being wholly unencumbered. In addition, the majority of holdings were blue chip real estate and strong cash flow performance assets. On reflection, the spin-off of HMC benefitted from several key industry and economic factors as follows.

First, business conditions at the time of the restructure were characterized by political pressure to reduce leverage, the credit crunch and associated high yield bond market collapse (1991-1992), and the installation of anti-takeover legislation by the US government (Jensen, 1991; Comment & Schwert, 1995; Holmstrom and Kaplan, 2001). Importantly, this confluence of factors supported the aims of a stable

restructure, while also protecting Marriott from hostile M&A activity.

Second, the spin-off, including the pre-emptive corporate downsizing and ongoing wage restraint, allowed the two firms to capitalize on the growth in international services trade throughout the 1990s (Wolff, 2003). This was particularly valuable as the lodgings industry exhibited improved fundamentals, profitability and growth in post-restructure timeframes (Su, 1998).

Third, the restructure occurred at the beginning of an improving US economic cycle with controlled inflation, stable unemployment and growth, and a lift in productivity through the 1990s (Mankiw, 2001). This has provided the two firms with an opportunity for growth and expansion. As an example, MII has acquired new businesses, including the Ritz Carlton chain in 2005, which has been transformed from a loss-maker into one of Marriott's star businesses.

Later named Host Hotels & Resorts, the spun-off listed vehicle continued to be one of Marriott's largest partner owners. Chaired by Bill Jnr's younger brother Richard, and with Stephen Bollenbach (the former Marriott Corporation CFO as CEO) Host continued to grow strongly as asset and debt markets became more favourable. While still a major partner owner for Marriott, Host expanded its portfolio to include hotels run by MII competitors Starwood, Hilton, Accor and Swissôtel, among others.

Many Corporations since have used these arrangements to maintain growth while concurrently lowering financial risk through 'deleveraging'. It has been a strategy that Marriott has developed and refined. Fundamentally, this separation strategy works as the business of owning properties and the business of running them require different but related capabilities and balance sheet characteristics (Lussi, Masset, Weisskopf & Blal, 2023).

The Marriott family's Mormon faith is more than an interesting family context in the case of Marriott Corporation. The social and ethical rectitude of Mormonism pervades the business – informing the manner in which people are treated and the way in which ethical behaviour should guide operational and strategic decisions. For example, at various times, Marriott grappled with the ethics of providing alcohol, in-room adult entertainment and casino gambling to its patrons – all frowned upon by the Mormon faith. Bill Snr made the (at the time) brave decision to open his restaurants in de facto segregated Virginia to black customers in 1960. These internal debates point to a serious consideration of the ethics of running the organisation.

It is perhaps worth considering the relevance this ethical stance had on investors, especially as the company restructured its operations in the 1990s. In an industry replete with speculators with questionable ethics, dealing with Marriott in terms of timeshare investments and real estate development and ownership may well have been seen as relatively less risky. Contemporaneous accounts speak of real estate investors being 'burned' by over optimistic projections among hotel operators (Greger & Withiam, 1991), although there is no evidence of this trend among Marriott managed properties.

However, the separation of the businesses between 1993 and 1995 did create winners and losers – the latter especially including Marriott bondholders who were concerned that the security that lay behind their bonds was eroded by the

transactions (Parrino, 1997). Indeed, on the announcement of the transaction bond values dropped from around 1.1 times face value to 0.8. A number of court cases ensued, notably PPM America, Inc. v. Marriott Corp., 853 F. Supp. 860 (D. Md. 1994), which while generally found in favor of Marriott, extracted some concessions for bond holders in the final transaction.

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## 5 CONCLUSIONS

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Key directional changes in Marriott's history have been characterised by a small number of significant and foresightful innovations that have changed the structure of the business. The move from food service to accommodation was an important one for the future of the company. The initial operations were close to Marriott's Bethesda headquarters, and were headed by the founder's oldest son. These investments into the lodging sector can be seen today as probing in nature, but significant in scale and commitment. This has been a characteristic of Marriott's portfolio innovation throughout its history.

Other portfolio innovations are seldom mentioned, but could also be seen as probing and significant. Examples of these were diversifications into theme parks and cruises. The fact that Marriott was able to abandon these ventures when they proved too challenging a fit for its corporate strategy points to a single mindedness in its pursuit of the dual aims of growth and profitability.

Clearly, the most significant innovation of Marriott has related to its far-reaching and bold financial management of its balance sheet as a result of 1992's Project Chariot plan. Driven as much by necessity as opportunity, the radical deleveraging of the emergent Marriott International in the mid-1990s was both effective in reducing debt and pointed to a new way of operating that Marriott has embraced since.

At the time, one analyst commented (Wayne, 1985):

*"The fact that Marriott was able to take a cyclical business and make it uncyclical is positive, and the fact that they've taken a very capital-intensive industry - hotels - and made it noncapital-intensive is masterful."*

Freed of the challenges of managing both a portfolio of real estate and a hotel business, Marriott has been exemplary in its success in the latter. The core of the Marriott business today is service provision. A typical Marriott is owned by a franchisee, REIT or pension fund or sovereign investor and managed by Marriott. This allows for high returns on capital invested. Franchisees pay steeply for Marriott's expertise, but are generally both loyal and satisfied as the Marriott brand brings in the customers, and switching to an alternative manager can be expensive and risky. As Marriott controls the creation of management contracts, it has been able to reduce its operational risks when the industry struggles, with accentuating its upside when the industry booms (Demir, Díez-Esteban & García-Gómez, 2019).

For Marriott ALFO created benefits relating to the economic and scale advantages of franchising with limited risks or liabilities. This business model approach reduced real estate costs while allowing the company to invest in its brand, its loyalty program, its platforms, and its operational technologies (Li & Singal, 2019).

Marriott's success can be seen as due to a flexible corporate strategy that focuses on high growth/yield businesses and a willingness to dispose of assets that cannot provide this outcome. This focus enabled the company to grow globally from the period of the 1990s onward. Its success can be seen in terms of its decisions to respond to changing operational and industry realities appropriately and successfully, especially as exigencies in asset and debt market made the portfolio structure it had developed over many decades unsustainable.

There is a danger to attribute Marriott's success to the success of these two innovations when luck was the primary driver (c.f. Barney, 1986). This would discount the fact that Marriott has shown its ability to exit ventures successfully (most notably fast food and other later ventures) throughout its history. Developing new ventures while concomitantly exiting old ventures has been the basis of the corporation's success.

Teece (2007) has explicated dynamic capabilities as the organisation's capacity in relation to sensing (an assessment of external threats and opportunities within and outside the firm), seizing (the effective mobilization of resources to appropriate value from those perceived opportunities) and transforming (continuous processes of renewal). Evidence from this case shows that Marriott has been able to concomitantly and consecutively undertake all three key activities, developing and renewing a corporate portfolio that is now a dominant player in the global lodging industry.

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# Aims & Scope

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## AIMS

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The *Journal of Tourism, Heritage & Services Marketing* is an open-access, international, multi-disciplinary, refereed (double blind peer-reviewed) journal aiming to promote and enhance research in all fields of marketing in tourism, heritage and services management. The journal is intended for readers in the scholarly community who deal with different marketing sectors, both at macro and at micro level, as well as professionals in the industry. The *Journal of Tourism, Heritage & Services Marketing* provides a platform for debate and dissemination of research findings, new research areas and techniques, conceptual developments, and articles with practical application to any tourism, heritage, and services marketing segment. Besides research papers, the journal welcomes book reviews, conference reports, case studies, research notes and commentaries. The *Journal of Tourism, Heritage & Services Marketing* aims at:

- Disseminating and promoting research, good practice and innovation in all aspects of marketing in tourism, heritage and services to its prime audience including educators, researchers, post-graduate students, policy makers, and industry practitioners.
- Encouraging international scientific cooperation and understanding, and enhancing multi-disciplinary research across various marketing sectors.

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## SCOPE AND PEER-REVIEW POLICY

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The scope of the journal is international and all papers submitted are subject to an initial screening by a member of the journal's Senior Advisory Board, and subsequently by strict blind peer review by 3 anonymous international reviewers. The journal features conceptual and empirical papers, and editorial policy is to invite the submission of manuscripts from academics, researchers, post-graduate students, policy-makers and industry practitioners. The Editorial Board will be looking particularly for articles about new trends and developments within different sectors of marketing and the application of new ideas and developments that are likely to affect tourism, heritage and services in the future. *Journal of Tourism, Heritage & Services Marketing* also welcomes submission of manuscripts in areas that may not be directly tourism or heritage-related but cover a topic that is of interest to researchers, educators, policy-makers and practitioners in various fields of services marketing.

Manuscripts published in *Journal of Tourism, Heritage & Services Marketing* should not have been published previously in any copyright form (print or electronic/online), unless the author(s) explicitly hold the copyright under a [CC-BY Licence](#). The general criteria for the acceptance of articles are:

- Contribution to the promotion of scientific knowledge in the greater multi-disciplinary field of marketing.
- Adequate and relevant literature review.
- Scientifically valid and reliable methodology.
- Clarity of writing.
- Acceptable quality of English language.

*Journal of Tourism, Heritage & Services Marketing* is published twice per year (in Spring and in Autumn). Each issue includes the following sections: editorial, full papers, research notes, case studies, book reviews, conference reports, industry viewpoints, and forthcoming events.

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Journal of Tourism, Heritage & Services Marketing is an open access, international, multi-disciplinary, refereed (double blind peer-reviewed) journal aiming to promote and enhance research at both macro-economic and micro-economic levels of tourism, heritage and services marketing. The journal's ISSN is: 2529-1947.

The journal is published twice per year (in Winter and in Summer) and is owned and co-managed by two academic units of the School of Economics & Business of the International Hellenic University: the Program of Postgraduate Studies in Tourism Management & Organisation and the Research Laboratory in Tourism "Tourlab". The International Hellenic University is the third largest public (state-owned) university in Greece.

For more information and for any editorial enquiries, please contact with the Journal manager at: Mr. Panagiotis Papageorgiou, International Hellenic University, JTHSM Editorial Office, Program of Postgraduate Studies in Tourism Management, School of Economics & Business, P.O. Box 141, GR-57400, Thessaloniki, Greece. Phone: +30-2310-013450, E-mail: [editorial-office@jthsm.gr](mailto:editorial-office@jthsm.gr). For any other questions or for inquiries regarding submission of manuscripts, please contact with the Editor-in-Chief at: Prof. Evangelos Christou, International Hellenic University, School of Economics & Business, P.O. Box 141, GR-57400, Thessaloniki, Greece. Phone: +30-2310-013193, E-mail: [echristou@ihu.gr](mailto:echristou@ihu.gr)

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Amendments are published in the article category "Addenda and Errata" and will be further classified as an "Erratum", "Corrigendum", "Addendum" or "Retraction". All such amendments should be as concise as possible, containing only material strictly relevant to the contribution being corrected. In very rare circumstances, JTHSM also reserves the right to remove articles

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In these circumstances, while the bibliographic information (title and authors) will be retained online, the text will be replaced with a page indicating that the article has been removed for legal reasons.

# Journal Sections

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## EDITORIAL

The Editorial addresses issues of contemporary interest and provides a detailed introduction and commentary to the articles in the current issue. The editorial may be written by the Editor-in-Chief, the Associate Editor, or by any other member(s) of the Editorial Board. When appropriate, a “Guest Editorial” may be presented. However, the Journal of Tourism, Heritage & Services Marketing does not accept unsolicited editorials.

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## FULL (RESEARCH) PAPERS

For the Research Papers section, the Journal of Tourism, Heritage & Services Marketing invites full-length manuscripts (not longer than 8,000 words and not shorter than 4,500 words) excluding references, from a variety of marketing disciplines; these papers may be either empirical or conceptual, and will be subject to strict double blind peer review (by at least two anonymous referees). The decision for the final acceptance of the paper will be taken unanimously by the Editor and by the Associate Editor. The manuscripts submitted should provide original and/or innovative ideas or approaches or findings that eventually push the frontiers of knowledge. Purely descriptive accounts are not considered suitable for this section. Each paper should have the following structure: a) abstract, b) introduction (including an overall presentation of the issue to be examined and the aims and objectives of the paper), c) main body (including, where appropriate, the review of literature, the development of hypotheses and/or models, research methodology, presentation of findings, and analysis and discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, limitations, and suggestions for further research), e) bibliography, f) acknowledgements, and g) appendices.

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## CASE STUDIES

Case Studies should be no longer than 3,500 words and not shorter than 2,000; these articles should be focusing on the detailed and critical presentation/review of real-life cases from the greater marketing sector, and must include – where appropriate – relevant references and bibliography. Case Studies should aim at disseminating information and/or good practices, combined with critical analysis of real examples. Purely descriptive accounts may be considered suitable for this section, provided that are well-justified and of interest to

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Research Notes should be no longer than 3,000 words and not shorter than 1,000; these papers may be either empirical or conceptual, and will be subject to blind peer review (by at least two anonymous referees). The decision for the final acceptance of the paper will be taken unanimously by the Editor and by the Associate Editor. The manuscripts submitted may present research-in-progress or my focus on the conceptual development of models and approaches that have not been proven yet through primary research. In all cases, the papers should provide original ideas, approaches or preliminary findings that are open to discussion. Purely descriptive accounts may be considered suitable for this section, provided that are well-justified and of interest to the readers of JTHSM. Each paper should have the following structure: a) abstract, b) introduction (including an overall presentation of the issue to be examined and the aims and objectives of the paper), c) main body (including, where appropriate, the review of literature, the development of hypotheses and/or models, research methodology, presentation of findings, and analysis and discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, limitations, and suggestions for further research), e) bibliography, f) acknowledgements, and g) appendices.

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## BOOK REVIEWS

Book Reviews should be no longer than 1,500 words and not shorter than 1,000; these articles aim at presenting and critically reviewing books from the greater field of tourism, heritage, services and marketing. Most reviews should focus

on new publications, but older books are also welcome for presentation. Book Reviews are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor-in-Chief and by the Book & Conference Reviews Editor. Where appropriate, these articles may include references and bibliography. Books to be reviewed may be assigned to potential authors by the Book & Conference Reviews Editor, though JTHSM is also open to unsolicited suggestions for book reviews from interested parties.

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#### **CONFERENCE REPORTS**

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Conference Reports should be no longer than 2,000 words and not shorter than 1,000; these articles aim at presenting and critically reviewing conferences from the greater field of tourism, heritage, services and marketing. Most reports should focus on recent conferences (i.e., conferences that took place not before than three months from the date of manuscript submission), but older conferences are also welcome for presentation if appropriate. Conference Reports are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor-in-Chief and by the Book & Conference Reports Editor. Where appropriate, these articles may include references and bibliography. Conference reports may be assigned to potential authors by the Book & Conference Reports Editor, though JTHSM is also open to unsolicited suggestions for reports from interested parties.

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#### **INDUSTRY VIEWPOINTS**

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Industry Viewpoints should be no longer than 1,500 words and not shorter than 500; these articles may have a “commentary” form, and aim at presenting and discussing ideas, views and suggestions by practitioners (marketing industry professionals, marketing planners, policy makers, other marketing stakeholders, etc.). Through these articles, JTHSM provides a platform for the exchange of ideas and for developing closer links between academics and practitioners. Most viewpoints should focus on contemporary issues, but other issues are also welcome for presentation if appropriate. Industry Viewpoints are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor-in-Chief and by the Associate Editor. These articles may be assigned to potential authors by the editor, though JTHSM is also open to unsolicited contributions from interested parties.

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Full research Papers should be not longer than 8,000 words and not shorter than 4,500 words (excluding references). Research Notes should be no longer than 3,000 words and not shorter than 1,000. Case Studies should be no longer than 3,500 words and not shorter than 2,000. Book Reviews should be no longer than 1,500 words and not shorter than 1,000. Conference Reports should be no longer than 2,000 words and not shorter than 1,000. Industry Viewpoints should be no longer than 1,500 words and not shorter than 500. Manuscripts that do not fully conform to the above word limits (according to the type of the article) will be automatically rejected and should not be entered into the reviewing process.

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## MANUSCRIPT STYLE & PREPARATION

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All submissions (research papers, research notes, case studies, book reviews, conference reports, industry

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Manuscripts should be double-line spaced, and have at least 2,5 cm (one-inch) margin on all four sides. Pages should be numbered consecutively.

The use of footnotes within the text is discouraged – use endnotes instead. Endnotes should be kept to a minimum, be used to provide additional comments and discussion, and should be numbered consecutively in the text and typed on a separate page at the end of the article.

Quotations must be taken accurately from the original source. Alterations to the quotations must be noted. Quotation marks (“ ”) are to be used to denote direct quotes. Inverted commas (‘ ’) should denote a quote within a quotation. If the quotation is less than 3 lines, then it should be included in the main text enclosed in quotation marks. If the quotation is more than 3 lines, then it should be separated from the main text and indented.

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Tables, figures and illustrations are to be included in the text and to be numbered consecutively (in Arabic numbers). Each table, figure or illustration must have a title.

The text should be organized under appropriate section headings, which, ideally, should not be more than 500-700 words apart.

The main body of the text should be written in Times New Roman letters, font size 12.

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For submission, manuscripts of research papers, research notes and case studies should be arranged in the following order of presentation:

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