

**THE CONSUMER'S PERCEPTION OF
THE ACCREDITATION OF
ADVENTURE TOUR OPERATORS**



by

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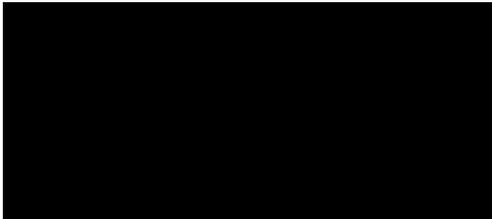
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To the best of my knowledge, this thesis contains no material previously published or written by another person unless where due reference is made in the text.



Suzanne Bergin
9 February 1998

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As most academics would attest the process involved in completing a thesis can be a stimulating but arduous task. It is the process, not the end result, that is the measure of success in this production.

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EXECUTIVE SUMMARY

The concept of accreditation is relatively new to the tourism industry yet industry leaders consider it a high priority in their attempts for continuous improvement and delivery of quality products. In developing current accreditation programs the industry has consulted with key players and a number of businesses but has neglected to gather feedback from the consumer. Although accreditation has become a prominent means of self-regulating the tourism industry there has been little research of consumers and their views of this process. In an attempt to address this gap this study was designed to explore the consumers' perception of the accreditation of adventure tour operators.

To assist in the identification of the gaps in this area a review of current literature in the fields of accreditation, adventure tourism and consumer choice was conducted. The review highlighted the growth of adventure tourism over recent years due to a move away from mass tourism towards smaller niche markets. The emergence of many small operators in this area identified the need for operations that not only provide safety but also a quality experience. Qualitative research conducted assisted in identifying the key attributes of the accreditation of adventure tour operators. The findings of the research were used to classify the accreditation of adventure tours into two major areas, program attributes and importance attributes. These two classifications formed the basis of the survey.

The accreditation program developed by Australian Tourism Operator's Association (ATOA) is currently a major accreditation program operating throughout Victoria. This program was utilised as a basis for comparing and analysing the data collected.

The consumers' view of these attributes has been measured through quantitative research. The primary research conducted attempted to identify the attributes that consumers rated highly in relation to the accreditation of adventure tour operators and to their choice and needs as consumers.

The key findings of this study highlight the importance of accreditation to consumers particularly in relation to staff competence, safety practices and environmental protection. Consumers of adventure tourism products, who participated in the study, rated accreditation highly. They also indicated that they would choose an accredited adventure tour operator over a non-accredited operator but it was not necessarily the most important influence in the choice process. This study provided evidence to indicate that there is some agreement that accreditation should be mandatory for adventure tours and that is important to safety and professionalism. The consumer's rating of accreditation attributes may also provide the basis for future benchmarking in this area. Consumers rated training in technical skills, organisation and planning, and legal operation more highly than the other attributes listed.

Overall ATOA's accreditation program compared favourably with the results as a number of higher rating attributes are included in their current program with evidence for minor changes with additional inclusions of 'safety' and 'environmental protection' as core competencies.

As a result of the findings of this study one of the main recommendations is to provide more information to the public on the accreditation of adventure tour operators particularly in relation to its implications to the safety of the consumer and the protection of the environment. It is also recommended that recognition of operator experience, staff competence, safety practices and environmental protection be considered in the ongoing review of accreditation programs for adventure tour operators.

CHAPTER 1

INTRODUCTION

1.1 Scene Setting

This study attempts to review the concept of accreditation and how it has evolved in relation to quality management and continuous development. It will also consider accreditation development within the tourism industry and its importance to industry development. The study will focus on the growth sector of adventure tourism and in particular businesses, which operate within Victoria, Australia. As the research is to ascertain the consumer's perceptions in this area, consumer choice will be an important component of the review and study design. The Australian Tourism Operators Association (ATOA) Accreditation Program, initiated by Victorian Tourism Operators Association (VTOA), will be central to the research undertaken and will form the basis for comparison and analysis

1.2 Background

1.2.2 Accreditation and the Tourism Industry

The rapid growth of the tourism industry in Australia has led to a range of problems and has placed heavy demands on the allocation of resources. In recent years there has been a rising tide of regulatory programs for use in the industry. These programs have been aimed at the tourists themselves, operators within the industry, host governments and host communities (Mason and Mowforth, 1996).

Accreditation programs are an example of the type of regulatory processes, which are currently a key focus of government bodies, and associations within the Victorian tourism industry. Continued development of the tourism industry relies heavily on the delivery of quality products. As continuous improvement is essential for sustainable tourism business growth, accreditation is considered a high priority by leaders in the industry (Kayler-Thomson, 1995).

As early as 1988 Victorian Tourism Operators Association initiated an accreditation program for their members fearing the imposition of regulation by government departments in relation to the use of public land (Kayler-Thomson, 1995).

Although this program was intended for tour operators it has since been extended to other sectors of the industry. In recent times other organisations such as Victorian Accommodation Association, Camping Association of Victoria, Host Farms - Bed and Breakfast have also established accreditation programs.

1.2.3 Defining Accreditation

The term accreditation is often misinterpreted and confused with rating of facilities and codes of conduct. Morrison, Hsieh and Wang provide a generic definition: "accreditation is a process by which an association or agency evaluates and recognises a program of study or an institution as meeting certain predetermined standards and qualifications. It applies only to institutions and their programs of study or their service" (1992, pp. 33).

It should be noted that current tourism accreditation programs are different to rating systems, which are frequently used to grade accommodation services by the number

and quality of amenities provided to the customer. Accreditation is also different to certification programs which are defined by Morrison as “a process which an individual is tested and evaluated in order to determine his or her mastery of a specific body of knowledge, or some portion of a body of knowledge” (1992, p. 33).

The Bureau of Industry Economics (1996, p. 7) defines accreditation or certification as “schemes which amount to non-mandatory licenses. They involve prior approval and compliance with minimum standards and accreditation can be withdrawn for failing to satisfy the standards. However, lack of accreditation does not prevent a firm from lawfully engaging in the relevant business activity.” This definition is more adequate in terms of current tourism accreditation and in particular VTOA’s accreditation program. VTOA’s program expects tourism operators to meet a basic standard of core principles, it is a voluntary, ongoing improvement process based on ‘Total Quality Management’ principles. VTOA supports the ongoing improvement of operators by providing training through seminars and support material such as videos and reading material. Another important aspect of VTOA’s accreditation program is the inclusion of a ‘code of ethics’ and a focus on sustainability.

1.2.4 Recent Growth

The concept of accreditation is relatively new to the tourism industry particularly in the area of small business. Recent information released by Tourism Victoria indicated that small business operators account for 80% of the tourism industry. The small business operator has the potential to provide hands-on experiences that the experiential tourist is seeking as they provide a more personalised service through their close contact with clients.

Strong tourist interest in both the environment and Australian culture indicates that substantial tourism opportunities exist, particularly in regional areas of Victoria. The adventure tourism sector has grown as a result of this need with 56% of VTOA's membership coming from the touring sector. The strong growth of the adventure tourism industry has seen the emergence of many small operators and the need for measures to raise their service standards to safe and acceptable standards.

1.2.5 Industry Support

The current government has made a commitment to support the continued growth of Victorian tourism. A number of private and public organisations including Tourism Victoria, VTOA, Country Victoria Tourism Council (CVTC) and Tourism Training Victoria (TTV) are working cooperatively to support and manage this growth to ensure increased market growth and sustainability. These organisations intend to promote programs that provide guidelines for responsible tourism practices and behaviour (Kayler-Thomson, 1995).

VTOA's accreditation program is now known as "Australian Tourism Operator's Association (ATO) Accreditation Program" because it is expanding to a national level. This program has established industry standards for tourism operators which includes the adventure tourism sector, to focus on quality assurance and management processes. VTOA intends for accreditation to provide the industry and the individual consumer with an assurance that an accredited tourism product possesses a commitment to quality business practice and professionalism.

VTOA emphasises that the accreditation program is not intended to standardise small tourism businesses but aims to support the small business manager by providing

processes and training to: improve safety, improve business practices and maintain the environment. The uniqueness of experiences provided and the development of their own brand will differentiate small tourism businesses.

1.2.6 The Importance of Consumer Choice

“Consumers are switching allegiances, challenging traditional ethics and actively seeking out products that are perceived to fulfil their needs, even if more costly” (Wight, 1993).

VTOA has established its accreditation program as a ‘quality benchmark’ for Australian tourism operators by establishing minimum standards and codes aimed at providing a quality experience for the consumer (ATOA, 1996). Although the standards and codes were developed by the industry there is a noticeable lack of consumer input into the program. The current program neglects to provide the consumer with information about the quality of the experience being purchased.

As consumers are the buyers of any tourism product their lack of input could be seen as a gap in the accreditation program development. A number of questions arise from this deficiency. What does the consumer expect from the tourism experience? What does the consumer see as important attributes of a tourist experience? What attributes does the consumer consider when choosing a tourism experience? Do the current accreditation programs have any impact on consumer choice?

Green and Wind (1975) suggest that in order to position a product or to develop a new product an organisation must know its market and must understand the nature of its product. Service measurement is a complex issue as the service can have several

qualities, which may appeal to different consumers in different ways. The challenge is to find out which of the product's attributes are perceived by the consumer to be the most important.

CHAPTER 2

RESEARCH OBJECTIVES

2.1 The Consumer's Perception

The emergence of many small adventure tour operations within the tourism industry in the past decade has led to an increase in product choice for the consumer. In this competitive market operators need to identify their market segment but the problem is that little information is available to tourism operators on what consumers are looking for in a tourism product and how a consumer chooses a tourism experience.

The development of accreditation programs for the tourism industry is considered necessary yet complex (Hutchinson, 1997). Accreditation is often misinterpreted and confused with the rating of facilities which is a more familiar concept. The same level of knowledge does not, as yet, exist with regard to accreditation systems. A real question exists as to whether the general population can distinguish an accredited operator from an un-accredited operator.

As the consumer determines a businesses' success by choosing the tourism experience that best meets their individual need, it is imperative to test consumers to determine which attributes of the experience are important to them and to ascertain whether operator accreditation has any impact on their decision making.

To achieve these aims a combination of primary and secondary research will be conducted. This research will be guided by the following aims.

2.2 Research Aims

There have been a number of research studies conducted into the area of attribute analysis, particularly in the manufacturing industry. There has been less of this analysis in the service industry, particularly in tourism. As far as the author can ascertain there has not been any study of accreditation attributes important to consumers utilising the services of adventure tour operations.

Therefore this study is concerned with the consumer's perspective of the accreditation of adventure tour operators specifically focussing on:

- The importance of accreditation to adventure tourists.
- The identification, by the consumer, of the key attributes associated with the accreditation for adventure tour operators.

It is intended that the research results will further define the market of adventure tourism and provide information for the future development of tourism accreditation.

2.3 Limitations and Assumptions

2.3.1 Seasonality

Peak season for adventure tourism in Victoria generally spans the late spring, summer, autumn period with most operators leading tours and experiences from October to May. When the research was conducted there was a decline in the number of adventure tours operating as it was outside these peak periods.

2.3.2 Sample Size

The sample size is limited by a number of factors including: budget restraints, time frame, seasonality, tour operators and their willingness to distribute the questionnaires to consumers. The sample size also limits the extent to which the outcomes can be generalised.

2.3.3 Outdoor Environment

Conducting a survey in an outdoor environment can limit the respondents ability to effectively consider statements as opposed to a survey conducted indoors where conditions may be more conducive to writing.

2.3.4 Price

Consumers surveyed for this study participated in either day or weekend commercialised activities. The cost of these tours average between \$100 - \$200. This price may limit the type of consumer participation and may not be indicative of all adventure tourists.

2.4 Overview of Thesis

The thesis focuses on Victorian adventure tourism operators and use ATOA's Accreditation program as the key accreditation program.

Chapter three provides an overview of adventure tourism and a history of tourism accreditation highlighting growth and current trends. This will be followed by a review of literature to critically appraise recent finding in the areas of consumer choice and service measurement.

Chapter four focuses on the methodology utilised followed by chapter five that discusses analysis methods and results.

Chapter six concludes and summarises the key findings. It also discusses implications and highlights directions for further research.

CHAPTER 3

LITERATURE REVIEW

3.1 Introduction

This chapter reviews current literature on the recent growth of accreditation in general and specifically within the tourism industry. Review of literature on adventure tourism, consumer decision-making and the measurement of tourism experiences will identify key gaps in studies of the consumer's perception of accreditation in the area of adventure tourism.

A total of fourteen hypotheses have been developed which will be stated throughout the chapter following the relevant literature from which they arose.

The chapter will conclude with a summary drawing together the key aspects and restating the hypotheses.

3.2 The Growth of Accreditation

3.2.1 Regulation Reform

Australian businesses generally require a number of licenses and applications for licences. Recent developments, in licensing in Australian and overseas jurisdictions are part of a general trend towards greater regulatory flexibility. "Since 1985 eighteen OECD countries have begun or expanded regulatory reform programs. These programs have tried to simplify and reduce the number of rules, to consolidate and eliminate laws, to encourage mutual recognition of standards, increase reliance on

market incentives, and to insist on stronger justifications for proposed new regulations” (Bureau of Industry Economics, 1996, p. 3).

In 1996 the Victorian Government established the Regulation Reform Task Force to undertake a Tourism Industry Regulatory Audit. The purpose of the audit is to develop, where appropriate a minimalist approach to regulation, with a view to a reduction in the overall regulatory burden, on the tourism industry. The audit will firstly identify and assess the impact of regulation on tourism and secondly identify and assess feasible alternatives to regulation.

These recent changes raise the question – is licensing an appropriate regulatory mechanism? Research by both the Victorian government and the Bureau of Industry economics would suggest that alternatives to licensing may be more effective in ensuring sustainability and improving quality of businesses.

3.2.2 Alternatives to Licensing

The key features of licensing include:

- Notification about the business to licensing agencies to guard against fraudulent or misleading trade names; prevent duplication of company names; provide the public with information about the company and its directors; and to enable inspections and audits.
- Obtaining approval prior to the commencement of business to reduce negligence.
- Imposing minimum quality standards by providing consumers with information about the quality of service providers.

- The compulsory nature that enforces conditions to revoke licences and restrict entry of potential competitors.

(Bureau of Industry Economics, 1996)

Other alternatives to licensing may provide greater positive net benefits to the community. “Businesses are now able to exchange good performance for less prescriptive regulation, or negotiate their own rules with regulators” (Bureau of Industry Economics, 1996, p. xvii)

The Bureau of Industry Economics (1996) states that licensing exercised by industry or professional associations leads to anticompetitive behaviour and restrictions of this type increase the price of the services of the licensed businesses. The bureau suggests that barriers to entry under licensing can be reduced in a number of ways. The options include:

- licensing agencies independent of the industry or profession and which include consumer representatives;
- licensing of potentially harmful actions rather than the professions performing the actions;
- negative licensing, which involves no prior approval but under which poor quality suppliers can be prohibited from trading;
- or voluntary accreditation systems that address the public’s need for information about the quality of the service without restricting entry of competitors. The key feature of accreditation is that businesses are free to seek accreditation but failure to be accredited does not prevent the business from providing the service and competing with accredited businesses. The bureau believes that as accreditation is

voluntary, consumers who prefer to exchange lower quality for a lower price are not disadvantaged but uncertainty about quality is reduced.

“Accreditation schemes, as alternative regulatory instruments could solve businesses problems currently addressed by licensing while fostering competition and expanding consumer choice” (Bureau of Industry Economics, 1996, p. xvii).

3.2.3 Explanations for Regulations

Common explanations for the use of business licensing are:

To account for spillover effects of ‘externalities’; to address information failures; to restrict competition and enhance market power; and paternalism (Bureau of Industry Economics, 1996).

Externalities may be negative or positive. An example of a negative externality would be a situation where a building site is polluting a river causing a ‘spill over’ onto other users of the river.

Information failure arises when either buyer or seller holds insufficient information to enable a socially optimal outcome to be achieved. For example, if the buyer is unable to readily assess its quality until after it is bought. Information biases occur when parties have flawed information, including incorrect risk perceptions. These biases in perception may lead to too much or too little safety, compared with information supplied on the basis of unbiased information. Licenses may address information failures by acting as signals by indicating that a service/product satisfies certain minimum standards (Bureau of Industry Economics, 1996). It is noted that other

mechanisms such as accreditation schemes may also address information failures and may do so more efficiently.

Licensing may *restrict competition* by imposing strict standards on new entrants, limiting the number of businesses in a particular market or by controlling the use of specific resources.

Paternalism refers to the interference with an individual's action which is justified by reasons related to welfare, good and happiness. In the case of licensing this is to address the vulnerability of some consumers in relation to the sellers capacity to manipulate the choices of consumers.

Changing views on regulation and a world-wide focus on quality assurance has led to the development of a large number of accreditation systems within a range of industries. This includes schemes that accredit accountants, hospitals and educational institutions and courses for example. There has been little legislation of the tourism industry and so self-regulation has played a key role in sustaining business as can be seen in the history of the regulation of travel agents which will be discussed further in section 3.4.

3.3 Adventure Tourism

The rapid expansion of the adventure tourism industry has seen the emergence of many small operators who seek the opportunity to develop businesses by catering for the needs of consumers seeking new and adventurous experiences.

Lack of regulation in this area means that unsuitable and inexperienced individuals may establish a commercialised adventure tour operation that places tourists at risk.

An analysis of this industry has been conducted in this review. Key issues reviewed in the literature attempted to define adventure tourism, its consumers and current concerns.

3.3.1 What is Adventure Tourism?

Adventure tourism is “related to physical challenges, educational experiences, sport and contact with nature” (Wight, 1993, p. 58). It interacts with traditional tourism and ecotourism, as they are all linked by an interest in contact with nature.

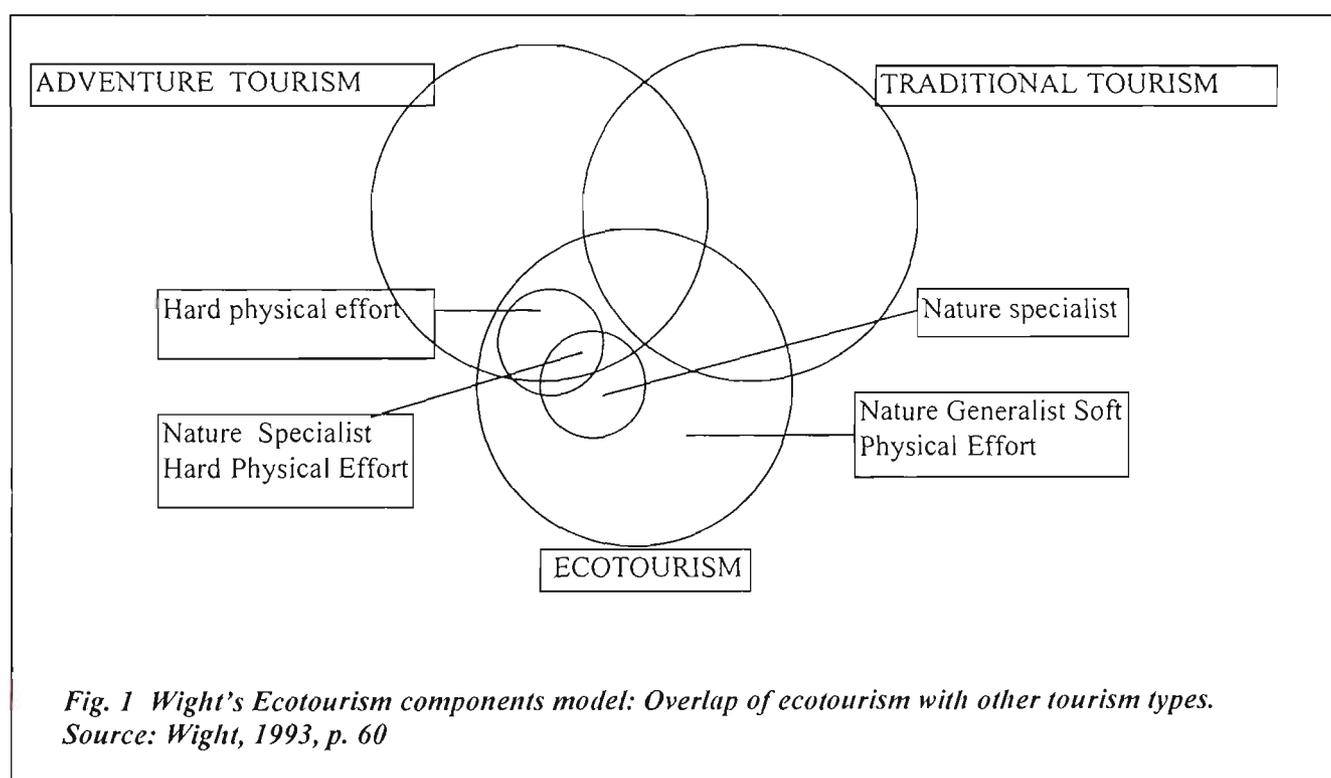
Mountaineer Chris Bonington defined adventure as “a journey, or a sustained endeavour, in which there are the elements of risk and of the unknown which have to be overcome by the physical skills of the individual. Furthermore an adventure is something that an individual chooses to do and where the risk involved is self-imposed and threatens no one but himself” (Bank, 1994, p. 3).

Eco-tourism is “where there is a range of interest in nature (from specialists to generalists), as well as a range of physical effort (hard and soft)” (Wight, 1993, p. 58). Hard ecotourists are specialists with an intense interest in nature, eg. a botanist. Whereas, soft ecotourists have a more casual and less intense interest in nature.

Adventure tourism overlaps ecotourism and partially encompasses some elements of the hard or soft ecotourism experience. The hard physical effort component of ecotourism overlaps with the adventure tourism sphere. Whereas traditional tourism does

not overlap into hard spheres as the traditional tourist is motivated more by relaxation and sightseeing, rather than in hard effort or specialist interest. (See Fig. 1)

Motivational forces in adventure tourism are related to the *degree of risk* involved but not all tourists who are motivated by adventure are necessarily eco-tourists. Ethics and values are key factors in ecotourism and may, but need not be present in adventure tourism.



3.3.2 The Emergence of Adventure Tourism

Mass tourism which evolved after World War II used to be the order of the day. It was similar to the mass production of products in the manufacturing industry. Holidays were standardised and inflexible. Holidays were consumed en masse in a routine manner. There was a lack of consideration for the culture or environment of the countries visited (Poon, 1993).

Changes in consumer behaviour and values are changing tourism. The new tourist is “more experienced, more ‘green’, more flexible, more independent, more quality conscious and harder to please than ever before” (Poon, 1993, pp. 9).

According to Poon (1993) a ‘new tourism’ is already apparent with:

- a demand for independent holidays
- a demand for choice and flexibility
- computerised reservation systems providing flexible alternatives
- increasing environmental planning and control of tourism in host countries
- increasing segmentation of vacation markets to cater to different lifestyle characteristics
- change in travel behaviour and motivation of tourists. Tourists now want shorter breaks and are more activity oriented.

Although eco-tourism and adventure tourism have always existed for the more adventurous traveller they have recently become attractive alternatives to more people because they have less of an impact on natural resources and enhance conservation of natural resources (Hvenegaard, 1994) and can provide the consumer with new experiences.

3.3.3 Benefits provided

Why do tourists want to participate in adventure tours? Is it the enjoyment, the social interaction or the excitement? Research in a variety of fields has focussed on the benefits that consumers seek. Psychological theorists would say that there are a

number of motives: personal control, competence, tension reduction, self-development, curiosity, or self-actualisation. Pearce's study of travel behaviour was concerned with a travel needs model and argued that people have a life-cycle in their travel behaviour which is built on Maslow's hierarchy of needs (Mc Intosh et al. 1995).

This hierarchy of needs suggest that the lower levels on the ladder need to be satisfied before the higher levels. This means that a traveller concerned with extending relationships through travel will also have needs in terms of physiology and safety but may not yet be ready for self actualisation needs. In this way consumers motives influence what they seek from tourism experiences.

3.3.3.1 Motivation for Hedonic Experiences

Mowen discusses the desire for hedonic experiences in close relation to the need to maintain an optimum stimulation level. He defines hedonic consumption as 'the need of consumers to use products and services to create fantasies, to gain feelings through the senses, and to obtain emotional arousal' (1990, p. 158).

Mowen discusses hedonic research that focuses on such products as movies, rock concerts, theme parks and sporting events as they are intrinsically more emotionally involving than using other products such as toothpaste or washing powder. He suggests that the choice of hedonically relevant products tend to be based on its symbolic value and on the likely emotion it is anticipated to elicit in the consumer.

Hedonic consumption also relates to the desire to engage in leisure activities. Mowen (1990) refers to the multidimensional concept of leisure and the variety of needs that

propel people to seek leisure. One of these needs is the desire to obtain an optimal stimulation level. According to Mowen, (1990) other reasons for engaging in leisure activities include:

- *Desire for intrinsic satisfaction*, where the activity is viewed as rewarding in itself. This means that performing or engaging in the activity does not have to lead to any other extrinsic reward.
- *Involvement in the activity*. The participant is so intensively involved in the activity that everyday life is forgotten.
- *Perceived freedom*. Leisure experience can be conceptualised as operating on an obligation-discretion continuum. Activities, which a person is obligated to perform, are categorised as non-leisure. Activities, which a person is free to perform, are categorised as leisure.
- *Mastery of the environment or of oneself*. By participating in the activity the person attempts to learn something well or to overcome some obstacle. The idea is to test oneself or to conquer the environment.
- *Arousal*. In seeking leisure activities that are novel, complex, and risky the arousal levels of consumers can be temporarily raised, which may produce pleasurable feelings. Activities such as parachute jumping and white water rafting strongly influence levels of arousal.

3.3.3.2 Travel Benefits

Market researchers explain reasons for travel in terms of “travel benefits”. Market segments are often defined based on the benefits sought. Echtner and Ritchie (1991) summarised a list of 34 attributes used in 14 leading studies of destination image. These researchers listed some of the features of destinations as: good service,

interesting countryside, opportunity for sporting activities, seclusion, good facilities, low cost, wide variety of things to do, and opportunity for adventure.

Chapman (1995) studied ecotourism in state forests and the ecotourist's behaviour. He was particularly concerned with discovering the preferences of the ecotourist. Chapman listed a number of forest attributes which tourists identified as most important. The list of attributes included: recreational activities, wildlife, landscape, abstract values (emotional and spiritual aspects), access facilities and visitor centres.

It is suggested that these lists are not comprehensive, relevant nor important to all destinations or experiences (Mc Intosh et al. 1995).

Which of these benefits do adventure tourists seek? The factors that determine the consumer's choice may lie in the consumer's perception of one adventure tour compared to another. In looking to buy benefits what importance does the consumer place on particular attributes of the product? As adventure tourists are people who have a higher need for activation levels they tend to engage in a greater deal of brand switching and tend to be greater risk takers (Mowen, 1990). How does this affect their choice of adventure activities? As the consumer cannot touch or try before selection the operator relies on marketing of particular features to sell his/her product.

Although adventure tourists could be seen as needing hedonic experiences do they all look for the same benefits? Understanding what is considered important in making product choices would be of interest to adventure tour operators. It could be suggested that accreditation is important to the consumers of adventure tourism products as it

assists in the choice process. Research needs to be conducted to collect primary data to establish if accreditation is important to the consumers of adventure tourism experiences.

HYPOTHESIS 1:

Consumers of adventure tourism products rate accreditation highly.

HYPOTHESIS 2:

There is a positive relationship between the importance of accreditation and the demographics of the consumer

3.3.3.3 Risk as a Key Focus

A study by Figgis (1996) analysed the risks associated with adventure tourism. This study highlighted that adventure tourism is different to any other form of outdoor recreation because according to Ewart it includes a deliberate pursuit of risk and uncertainty of outcome. Ewart also suggests that only in adventure based recreation is there a deliberate inclusion of activities which could threaten an individual's health or life (Ewart 1987, cited in Weiler and Hall 1992).

3.3.3.3.1 Commercialised Operators

Brown (1989) defines adventure tourism in terms of controlling hazards of a natural environment through the application of specially developed skills and judgements. In defining adventure tourism Hall et al. (1992) also focus on the commercialisation of outdoor touristic activities and the influence by participants, setting and management of the experience.

Weiler and Hall (1992) also suggest that there needs to be a high level of coordinated management of adventure tours due to the high degree of risk involved. A lack of coordinated management could increase the likelihood of tourist injury or fatality.

Hall (1992) states that there is evidence to suggest that tourists use commercialised adventure activities as a safe introduction to adventure travel, and then proceed to experience the activity independently.

It could then be suggested that it is vital for managers to ensure there is an appropriate balance between safety skills and risk. Weiler and Hall (1990) support the need for adventure tour managers to be responsible for staff experience, careful selection of routes and extensive use of safety precautions and procedures.

3.3.3.3.2 Legal Requirements

There are legal requirements that govern operator liabilities such as Contract and Agency Law and Law of Torts (Heilbronn, 1992). These obligations imply that the operator should: act with competence and diligence; resolve traveller's problems; and avoid the effects of natural disaster. To protect themselves against negligence charges travel operators insure their businesses and can also ask clients to sign a liability waiver clause.

Figgis (1996) suggests that the operator who is experienced, skilled and well planned should be able to make an adventure experience safe to a certain degree but it should also be understood that it is not always possible for humans to control the effects of the natural environment.

3.3.3.3.3 Rapid Growth of The Industry

The rapid expansion of the adventure tourism industry is also a concern for operators. Lack of regulation means that unsuitable and inexperienced individuals may establish a commercialised adventure tour operation that places tourists at risk. Figgis (1996) highlights that 'backyard' operators can place tourists at greater risk of encountering accidents because these operators may cut corners with the quality of equipment used.

Richardson (1993) supports the need for qualifications of guides in a number of specific adventure tour and ecotour areas. Richardson suggests that the qualification should be concerned with safety and ability and would assist the consumer in choice of product. 'Accreditation of ecotour operators would greatly assist the travelling public, especially if ecotour operators had an easily identifiable logo alongside tours listed in their travel brochures. Marketing abuse could also be controlled by the development and implementation of an accreditation policy', Richardson (1993. p. 42).

Figgis's (1996) study, although limited, concluded that potential adventure tourists listed more risks for adventure tour activities than the operators; there were quite different perceptions about the frequency of accidents; potential tourists believed the risks described to be real whereas the operators regarded the risks to be minimal, with little chance of them happening. Figgis concluded that it is not the number of risks, rather the degree of danger in each risk that affects a potential tourist's choice of an adventure tour activity.

Although potential adventure tourists list a number of risks in relation to various activities it could be suggested that perceptions of risk vary from individual to individual.

Figgis made two recommendations relevant to this study:

- more research needs to be conducted into the safety of various tourism activities, and the findings of these studies need to be made available to potential adventure tourists, so that they can make informed decisions about activities they are considering undertaking.
- operators in the business of adventure tourism should market their product with an emphasis on the safety of their operation, and not necessarily the safety of the activity. This will reassure the tourist that all they have to be concerned with is the natural environment and not the reputation and professionalism of the operator.

HYPOTHESIS 3:

There is a difference with respect to demographics between those with high beliefs that accreditation is important to safety and those with low beliefs.

HYPOTHESIS 4:

There is a positive relationship between consumer demographics of tourists and the degree of risk of the adventure tourism activity they select

3.3.4 What type of activities operate in the Adventure Tourism Industry?

Adventure tourism is quite diverse as indicated by the type of adventure tourism operators who are listed as members of VTOA. The VTOA membership directory is one of the most comprehensive lists of Victorian adventure tourism operators currently available. Part of the membership list summarised in Table 1 shows a total of 477 different activities delivered by 175 tour operators who are classified as 'adventure'.

Table 1: Type and Number of Victorian Adventure Tourism Operators

Activity Category	Number of Operators
Rock climbing	40
Fishing	12
Horse Trail Rides	61
Bush walking/ Trekking	75
4 wheel driving	46
Camping	26
Balloonng	7
Mountain bike riding	10
Abseiling/Ropes	44
Camel Tours	10
Canoeing	43
Boating	12
Aviation	5
Caving	7
Cycling	13
Diving/snorkelling	4
Downhill Skiing	8
Mountaineering	3
Paragliding/parasailing	3
Sailing	4
Surfing	7
Skydiving	1
Ski touring	3
Sea Kayak	4
Scuba Diving	1
Trail Bike Tours	5
White water rafting	20
Wind Surfing	2
Wall Climbing Tours	1

Source: VTOA Membership Database 1997

Although there are extensive activities available to the consumer, literature searches conducted for this study have failed to find any information on adventure tourists in relation to the type of operator they select.

HYPOTHESIS 5:

There is a positive relationship between consumer demographics and the size and category of operator they select.

3.3.5 Industry standards and training of Adventure Tour Operators

Why must adventure travel operators take responsibility for training and meeting industry standards?

Quite simply, because clients of the growing businesses of adventure travel and ecotourism are looking for quality experiences. These discerning people want new and thrilling challenges, memorable adventure, involvement in learning experiences of natural and cultural environments, escape from daily routines. At the same time, these clients want safe experiences and to be able to come back for more. To meet these client expectations, and run responsible, profitable businesses, adventure travel and ecotourism operations must be soundly based, providing the experiences the clients wish and employing staff who are professionally trained and experienced (Hicks, 1993, p.78).

The number of tourism associations currently developing accreditation programs continues to grow as seen in section 3.4 of this review.

Tourism associations, other than VTOA, have developed programs to ensure the sustainability of the adventure/ecotourism industry. Two examples are Pacific Asia Travel Association's (PATA) *Code of Environmentally Responsible Tourism* and New Zealand Tourist Industry Federation's *The Adventure Tourism Core and Management Skills Training Program* (Hicks, 1993; Pearce, 1993). Further details of tourism accreditation programs will be detailed in section 3.4.

3.3.6 The Adventure Tourism Market Segment

Market segmentation is a process used in marketing to divide people into groups which share common characteristics. These segments are expected to have similar

purchasing and travel behaviour. Knowing the market segment assists the manager or marketer to develop a marketing strategy that “matches products, services, prices, promotions and distribution methods with the motivations, needs and expectations of the selected target markets” (Morrison et al. 1994, p. 39).

Although it is equally important for people in the adventure tourism industry to know the demographics and psychographics of adventure tourists little literature is available on who these consumers are. Morrison et al (1994) has provided some information in the study he conducted of Australian tourists and segmented travel markets by activity participation. Although this was a general study he defined six activity segments, two of which had a high participation rate in adventure activities as defined in sections 3.6.6.1 and 3.6.6.2. He described these two segments as: *The Budget-conscious, outdoor recreation group* and *The Younger active outdoor recreation group*.

The characteristics of these groups were:

The Budget-conscious, outdoor recreation group:

- A high proportion of blue-collar workers who had the highest participation rates in outdoor recreation activities such as bush walking and hiking.
- A high proportion of younger and middle-aged people.
- A high usage rate of camping facilities.
- They have a preference for low-cost holidays.
- They see themselves as travellers and not as tourists.

The Younger active outdoor recreation group:

- A large proportion of people less than 35 years of age.

- A high participation rate in outdoor recreation activities such as adventure and sporting activities.
- Made up of either families with children, or singles.
- Mainly white collar workers.
- They had relatively high incomes.
- Rated good service, low-cost, accommodation, good camping facilities and nightlife highly.
- They like to see lots of new and different things.
- They do a lot of research into holidays.
- They see holidays as extremely important.
- They are most likely to book trips in advance.

Hvenegaard (1994) has also conducted research in the area and defines ecotourists and some adventure tourists as: representing a cross-section of society, but tend to be in the 40-50 age bracket, are well educated and have above average incomes. This profile is similar to Morrison's et. al. (1994) *younger active outdoor recreation group* but neither author clearly defines the market segment specifically for adventure tourism.

Although Morrison highlights the importance of market segmentation for marketing success he also states that people tend to move from group to group influenced by life cycle stages.

3.3.6.1 Characteristics of Adventure Tourists

The shift from mass tourism and packaged holidays to more specialised tourism suggests that today's traveller is seeking different experiences.

Mass Package Holiday Tourists generally share similar characteristics, which can be defined by the following traits:

- seek cheaper holidays
- like home comforts
- want to be guided and led
- expect arrangements to go as planned
- need to feel safe

The characteristics of adventure tourists are particularly unique and different from mass package tourists. As adventure tourists vary on the amount of experience they are not all alike and range from the emerging adventure tourist to the hard adventure tourist.

Based on information from PATA (1995) and VTC (1988) *The Hard Adventure Tourists* could be described as sharing some of the same traits as the mass package holiday tourists but can be differentiated by the following traits:

- don't want comfort
- will take risks
- are collectors of new experiences
- prefer to travel alone, in pairs or in small groups
- don't expect perfect service but want warm atmosphere and fresh surroundings

HYPOTHESIS 6:

The demographic details of the consumers of adventure tourism products will vary in relation to age, gender, family, salary and education.

3.4 Tourism Accreditation History

International Air Transport Association (IATA) and recently Australian Tourism Operators Association (ATOA) are key tourism associations who have provided industry regulation through accreditation systems. A brief history of these key organisations is outlined in the following section.

3.4.1 Regulation of Travel Agents through Accreditation

Strong international measures, particularly for the accreditation of travel agents dealing with international air travel have been imposed by the International Air Transport Association (IATA). This association has attempted to establish standards for competence, financial viability and reputable service of travel agents for the benefit of airlines and travellers.

3.4.1.1 International Controls

3.4.1.1.1 International Air Transport Association (IATA)

“Since 1946, IATA’s Agency Programs, have standardised and closely regulated airline appointment of sales agents and the details of airline-agent commercial and legal relations.” (Heilbronn, 1992, p. 250).

IATA's membership consists mainly of international airlines, which are certified by their national governments as eligible for full membership. Domestic airlines have associate membership.

3.4.1.1.2 Nature and Role

IATA, a non- government organisation, supervises commercial and legal relations between international airlines and travel agents through the IATA Travel Agency Program. This particularly relates to reservation procedures. IATA has established worldwide standards of professionalism, competence and training through accreditation requirements.

3.4.1.1.3 Regulatory Activities Through Accreditation

A major role of many travel agents is the sale of passenger airline tickets. A strict accreditation system for selecting and retaining professional travel agents for airlines has developed due to the complexity of this role.

New accreditation requirements were established in Australia which required agents to meet certain financial qualifications involving: working capital; shareholder's equity and business activity records. Accreditation requirements enable IATA's Agency Administration to request a review of an agent. It should also be noted that the legislation through the Travel Agent Act 1986 requires travel agents to participate in the Travel Compensation Fund which was initially developed through the Australian Federation of Travel Agents (AFTA). The role of AFTA will be discussed further in section 3.4.1.2.1.

When travel agents are accredited by IATA as agents for the sale of passenger tickets, they:

- “are authorised to sell airline travel and other services
- hold ticket stock and “Carrier Identification Plates”
- hold money on behalf of the airlines concerned
- benefit from certain indemnities given by the airlines
- owe certain standardised obligations to the airlines and
- suffer penalties for violating the agency arrangements”

(Heilbronn, 1992, p. 251)

As travel agents frequently represent several airlines IATA has addressed the problem of preferential treatment in selling and promoting airline tickets by controlling airline-agency relations through a uniform system of agency sales commissions. In Victoria the base commission for the sale of international airline tickets is 9%. Override commissions can however be negotiated between airlines and agents.

3.4.1.1.4 The Importance of Accreditation

Without accreditation, airlines would be required to negotiate their own agreements with travel agents at a domestic and international level. Airlines would also need to establish a system for monitoring each agent’s performance, financial standing, ethical practice and administration. Accreditation is more efficient in developing and implementing these processes.

Accreditation avoids government intervention through the development of industry standards and a code of conduct to ensure competence, honesty and responsibility.

IATA's standardised procedures are widely accepted and are formally binding on IATA's scheduled airline members by Traffic Conference Resolutions.

Non-accredited agents may sell air space on carriers outside the system through commission-sharing arrangements with other travel agents called "consolidators".

3.4.1.1.5 IATA in Australia

IATA sales agents who operate under traditional IATA accreditation operate in every country except Australia, Canada, Singapore and the USA.

There have been a number of modifications to IATA's accreditation program for Australian circumstances that include:

- "Use of streamlined procedures whereby Australian agents seeking accreditation apply directly to the Agency Administrator.
- Complete exclusion of the Area Agency's Board's jurisdiction over accreditation of travel agents in Australia and the elimination of the Agency Investigation Panel.
- Establishment of a General Assembly, representing all airlines serving Australia and travel agents, with delegated authority to make, modify or remove various kinds of accreditation requirements.
- Establishment of an independent Travel Agency Commissioner created to review and determine disputes between agents and the Agency Administration.
- Removal of anti-competitive elements from the Australian rules, notably any discretion to reject applications on the ground that airlines are already adequately represented; 'bonding' requirements; and minimum 'productivity' levels."

(Heilbronn, 1992, p. 267.)

3.4.1.1.6 IATA's Bank Settlement Plan (BSP)

The BSP is an accounting tool for participating airlines and travel agents. This plan simplifies procedures and avoids remittance lags and limits defaults in payment. It is a standardised contractual arrangement. "Each travel agent, every 14 days, completes, and submits to a central Reporting Point, a "Sales Transmittal Form" listing all the Standard Traffic Documents issued. The Central Reporting Point processes the reports electronically and generates a single bill which the agent settles with the Clearing Bank, which transmits the processed documents and settlements to the airlines concerned." (Heilbronn, 1992, p. 267.) Recent planned changes by IATA to introduce weekly BSP payments have not been welcomed by agents.

3.4.1.2 National Controls

3.4.1.2.1 Australian Federation of Travel Agents (AFTA)

In Australia travel industry regulation is pursued primarily by AFTA and the Travel Agent Act (1986).

3.4.1.2.1.1 Activities and Role

AFTA commenced in 1957 as a trade association for Australian Travel Agents.

AFTA deals with a range of issues affecting the travel agent industry. It operates a number of committees that deal with different aspects of tourism and travel, for example: a Grievance and Ethics Committee to oversee unethical practices of members; an Education and Training Committee which promotes recognised education and training for travel agents and has assisted in the development of the Travel Compensation Fund; and an Industry Practices/Bonding Committee.

AFTA has developed a code of conduct and consumer guidelines known as “Travel Industry Procedures and Consumer Protection Legislation Guidelines”. The guidelines apply to contractual obligations and advertising conduct of suppliers, tour promoters, retailers and intermediaries to ensure that they comply with federal and state ‘consumer protection’ requirements under the “Fair Trading” laws and the “Trade Practices Act 1974” (Heilbronn, 1992, p. 341).

For example, detailed guidelines are provided to the travel industry to ensure appropriate conduct in relation to advertising: which involves the need for accuracy and the need for brochures to comply with normal advertising guidelines, (ss. 52-55 Trade Practices Act).

In June 1996 AFTA’s membership was continuing to grow with a membership of 2,245 and according to the 1997 AFTA website (www.afta.com.au) the organisation represents approximately 80% of Australian travel agents.

AFTA is noted for its role in resolving consumer and industry complaints. The complaints have come mostly from consumers and 35 % of complaints deal with agents that are non-members (Heilbronn, 1992, p. 341). In 1995-1996 AFTA received 322 written complaints and 584 telephone complaints with 98% successfully resolved. The nature of complaints addresses areas such as: delays in obtaining refunds; increase in ticket price; cancellations; visas; and failure to explain conditions (AFTA Annual Report, 1996).

Occasionally travel agents may have their AFTA membership withdrawn if articles of the association are breached.

3.4.2 Australian Tourism Operators Association (ATOA)

The *ATOA Tourism Accreditation Program* was developed by Victorian Tourism Operators Association (VTOA) in 1995 with the primary purpose of establishing tourism standards that were acceptable and respected by individuals and organisations within the marketplace. It is intended for the accreditation program to improve tourism businesses, to ensure sustainability to assist them in becoming more competitive in the business arena by offering clear guidelines for quality service and management practices. The program has been developed based on 'Total Quality Management' and 'Quality Journey' principles. This program has the endorsement of the Australian Quality Council.

3.4.2.1 VTOA's Mission

VTOA is a private membership-based organisation whose role is to represent and support tourism operators in Victoria. A major function is to ensure the sustainability of tourism operators. VTOA also represents tourism operators in Victoria by communicating issues and opportunities to decision-makers in government and the industry to ensure the interests of the membership are being addressed. Support is provided through the development and implementation of the accreditation program; the promotion of networking; the provision of training opportunities via workshops and seminars; cooperative marketing and a variety of other services.

3.4.2.2 Members

At the end of the 1996/97 reporting period VTOA had a membership of 625 Victorian tourism operators (Annual Report, 1997). These operators are predominantly small businesses who offer a range of experiences including hosted accommodation, tourist attractions, tours and restaurants. The Australian Tourism Operator's Association (ATOA) was formed by VTOA in 1996 to implement the accreditation program. One hundred and eighty operators have already gained accreditation under ATOA's accreditation program. It is not necessary for an operator to be a member of VTOA to be eligible for accreditation.

3.4.2.3 ATOA's Accreditation

3.4.2.3.1 Program Objectives

ATOA has been established to service the needs of an expanding Australian tourism industry. Its commitment is to both the professional development and long term commercial and environmental sustainability of tourism operators in Australia. Established in 1996 it provides tourism associations and individual tourism businesses with access to approved tourism accreditation programs, group purchasing opportunities and operator education and training programs.

Membership is gained through membership-based tourism associations/organisations who align with nominated criteria and licensing arrangements by ATOA.

A number of benefits are provided including: reduction in Public Liability Insurance costs; government sponsored marketing programs; discounted membership fees;

discounted cost for public land permits; and use of marketing material eg. certificates, and accreditation logo.

The ATOA accreditation program has been commended by a number of associations including Tourism Victoria.

3.4.2.3.2 The Quality Journey

The success of Japan as producers of quality products in the 1970's and 80's motivated many other countries to take on the challenge of Total Quality Management. Quality is an elusive concept and a number of organisations today still lack a full understanding of the entire quality approach.

Buhler (1995) suggests that management needs to be more informed about how to establish a framework to introduce a quality approach to business. Buhler highlights that while different organisations may follow a similar framework the formulation and implementation of a quality approach should be unique.

Many consider quality to be a journey. It is an “ongoing, spiralling process that leads an organisation to ever higher levels. It is truly neverending” (Buhler, 1995, p. 26).

A traveller would not set out on a journey without a map, and then so to it is with an organisation on the quality journey. The map or framework has a series of steps.

Buhler defines the ‘Total Quality Management’ process in three steps:

1. Focussing on the customer to identify and meet their needs.

2. Process improvement involving continuous improvement of the organisation's processes and measuring performance.
3. Total involvement, which aims to involve all members in the improvement process. Leaders inform and empower all other members.

Other key areas emphasised in the quality journey are:

- The importance of continual communication.
- The establishment of a vision statement to describe the future of the organisation.
- The development of a mission that drives the strategic management process.
- The measurement of performance which leads to action plans that are then implemented.

Through this ongoing process critical processes are identified and then prioritised for attention. These processes should be core areas of the business.

VTOA in developing its accreditation program followed a similar process but has neglected the first and most important step, identifying the customer and the customer's wants and needs. Comley (1995) stresses that the first steps - identifying customers, defining customers' wants and needs; and identifying performance indicators are the starting points in the strategic planning process.

VTOA's aim is to empower the individual operator to take on the responsibility of quality assurance by providing a framework of self-improvement through the accreditation program. The identification of customers wants and needs as part of business planning is an important stage that should be given priority in the accreditation process.

3.4.2.3.3 How it works

The ATOA accreditation program is a self-assessed program that allows businesses to measure and improve business performance over time. The main focus is on improving business planning, establishing effective operating systems and measuring performance against minimum performance levels.

The program also aims to: identify individual strengths and weaknesses; provide industry benchmarks; assist with marketing and promotional opportunities; provide a common assessment framework; provide methods for improved risk management, environmental measurement and sustainability.

It is up to the operator to seek accreditation of their tourism business by completing relevant documentation, which is submitted to an accreditation panel for assessment. State or territory Tourism Accreditation Panels are authorised to approve applications for accreditation. The panel randomly assesses files containing licenses, permits and certificates of business operators to maintain the integrity of the program. As well, a random formal assessment of an accredited business may occur. In this instance an assessor, after advising of the inspection, visits the business location to verify the existence of documentation as listed by the operator.

Independent product and performance testing, evaluation and accountability are supported by Wight (1993a). Wight's studies on ecotourism highlighted the need for industry performance standards and an ethics based code of conduct.

ATOA accreditation is valid for a three-year period and it is expected that a tourism business would maintain or improve their level of accreditation by forwarding updated information at renewal time. A tiered accreditation fee structure exists and is based on business revenue.

It is the operator's responsibility to maintain reasonable standards of performance and conduct. If conditions of accreditation are not abided by the accreditation may be revoked. There are appeal processes for operators to present their case.

The accreditation program is a new concept to the tourism industry and VTOA recognises the need for constructive feedback from tourism businesses as part of the continuous improvement process. The next version of the accreditation program is due in July 1999.

3.4.2.3.4 Accreditation Principles

The *Quality Journey Model* as explained, has been adapted by VTOA to reflect the traditional components of business planning and procedures (ATOA, 1996). Nine accreditation principles were identified against which performance is assessed. These nine principles are: business planning, legal requirements, operational procedures, risk management, environmental management, marketing, networking, quality assurance, and code of ethics. The three key features of the program have been identified as *safety, legal requirements and environmental management*.

The tourism accreditation program provides standards nominated by the industry. There are three levels of performance:

- Level 1: the minimum level that a tourism business needs to achieve.
- Level 2: indicates a high quality standard for a tourism business and is based on a high level of commitment.
- Level 3: demonstrates a total quality approach that reflects best practice within the tourism industry.

This accreditation program looks at the industry's view of how a quality business should operate and is strongly business management focussed.

A number of other associations in the tourism industry have moved in the direction of developing programs and codes to enhance the way businesses conduct business. eg. Tourism Council of Australia; Pacific Asia Travel Association (PATA); The Centre for Responsible Tourism (California); and the Ecumenical Coalition on Third World Tourism (Wight, 1993a).

In summary IATA, AFTA and ATOA all provide accreditation programs to the tourism industry. Although each program aims to help regulate and manage their particular sector they differ in relation to accreditation process, attributes and importance.

Airlines and travel agents rely on the IATA program for efficient and effective negotiation of agreement in relation to business and sales. It is rigorously enforced and monitored.

AFTA accreditation for travel agents is more of a watch-dog for consumers, playing a large role in resolving consumer complaints and ensuring appropriate conduct of travel agents. It also provides education and training for its members. AFTA accreditation is used as a marketing tool and is often mentioned in advertising campaigns.

ATOA's accreditation is a self-assessed program aimed at ongoing measurement and improvement of business performance. It is structured to identify weaknesses and strengths, provide benchmarks, a common assessment framework and marketing opportunities to the operator.

At this stage it is unclear as to how accreditation impacts on quality or how any improvement is passed on to the consumer. An important issue to consider in studying accreditation is the role it plays in consumer choice.

3.4.3 The Attributes of Current Adventure Tourism Accreditation Programs

3.4.3.1 Current Adventure Tourism Accreditation Programs

A review of current adventure tourism accreditation programs has provided a number of definitions and purposes for accreditation development:

Manditis Roberts Consultants (1994) conducted an investigation into a national ecotourism accreditation scheme. Their report stated that the process of accreditation is part of a continuum of measure to improve professionalism, standards, training and quality in the service sector. The Manditis findings concluded that an accreditation

system needs to cover each component of a tourism organisation, individual, company and product/location. “The scheme will provide ecotourism operators with basic standards which they can use to continue to strive towards minimal environmental impact and ecologically sustainable development.” (Manditis, 1994).

The national ecotourism accreditation scheme was developed to:

- Differentiate and designate bona fide ecotourism operators.
- Minimise impacts and improve the ecologically sustainable development of tourism in Australia.
- Enhance the reputation of Australian ecotourism in both domestic and international markets.
- Allow natural resource managers to better monitor ecotourism operators and better protect valued natural and cultural assets.
- Supply consumers with information upon which they can make accurate comparisons of different enterprises and activities (Manditis Roberts, 1994).

In 1996 the Ecotourism Association of Australia together with the Australian Tourism Operators Association developed the final program for ecotourism titled: *National Ecotourism Accreditation Program*. This was a program developed by the industry in response to the need identified by industry for a system to assess and promote genuine ecotourism operators in Australia.

Ecotourism accreditation aims to provide industry and consumers with an assurance that a product or service will be delivered with a commitment to best practice in

environmental management and importantly a commitment to providing quality ecotourism experiences for consumers.

“By bringing our visitors’ attention to these issues, and by giving them the confidence in our services which comes from a reputable, rigorous national stamp of quality, we can help our industry thrive and protect the resources on which it depends”

(Ecotourism Association, 1996, p. 2).

In New Zealand *Adventure Tourism Core and Management Skills Training Program* was developed:

- To improve the level of professionalism in the industry by developing an industry endorsed program that could be delivered consistently and with high standards.
- To provide a better outdoor adventure experience for the client.
- To increase productivity and profitability of existing adventure tourism and outdoor recreation operations.
- To identify and discuss changing trends in the industry and to ensure a competitive edge in the international marketplace in the future.
- To develop safe, responsible guiding practices that are sensitive to the environment, encourage minimum impact land-use practice and increase the economic impact of adventure tourism on the local, regional and provincial economy.
- To increase the effectiveness of human resource development by encouraging strong links and cooperation among all of the industry associations.
- To provide equal access of learning opportunities to students.

- To provide people in remote rural communities increase the opportunities for year-round employment.

(Hicks, 1993,)

The *Commission for Accreditation of Park and Recreation Agencies* believes that agency self-assessment and peer review is an excellent process for evaluating the quality of the system that delivers the service. It also provides benefits to the public through:

- Assurance of well-administered services in accord with approved professional practices.
- Possible translation into external financial support and savings to the public.
- External recognition of a quality governmental service.

Accreditation also provides benefits to the agency through:

- Public and political recognition.
- Increased efficiency and evidence of accountability.
- Answers the question, “How are we doing?”

(Commission for Accreditation of Park and Recreation Agencies, 1997,)

In 1992 *National Outdoor Recreation Leadership Development (NORLD)* commenced a process to develop some consistency in the standard of training of outdoor leaders. The units of competency will be used to form the basis for curriculum development to train and accredit outdoor leaders. The generic recreation units cover: group management, emergency response, environment/minimal impact and miscellaneous (which includes equipment, physiological well-being, navigation,

site selection and weather considerations). Specific skill areas covered include climbing, caving, paddling, canoeing, rafting and skitouring (NORLD, 1996).

ATOA's *Tourism Accreditation Program* states that their self-assessment accreditation program is aimed at establishing minimum industry standards for conducting a tourism business. Based on business development principles it allows the operator to measure and improve the business performance over time, focussing on business planning, operating systems and performance measurement. This program aims to provide tourism businesses with the following:

- Minimum performance levels;
- Information on ways to improve, if the operator wants to;
- Differences and areas of strengths and weaknesses by assessing business performance for each element;
- Tools to gauge performance in relation to particular recognised industry benchmarks (best practice);
- Assistance and development of marketing and promotional opportunities;
- A consistent framework for assessment common to all tourism operators;
- Environmental management and sustainable practices;
- A simple yet comprehensive approach to managing the risks in a business (risk management).

ATOA believes that accreditation provides industry and consumers with a confident expectation that a tourism product or service possesses a commitment to quality business practice and professionalism in all endeavours of its operation.

(ATOA, 1996)

3.4.3.1.1 Common Elements

An analysis of current adventure tourism accreditation programs highlights a number of common elements.

It seems that most programs view accreditation as:

- A framework; a tool; or an audit to be utilised to *assess or evaluate* an organisation's performance.
- A means of protecting resources, improving environmental management or developing practices that are sensitive to the *environment*.
- Provides confidence that minimum uniform *standards* or performance levels are being met.
- Improves the level of *professionalism* of an organisation.
- Helps the industry by increasing *productivity and profitability*.
- Although it may not guarantee excellence or quality it provides a confident expectation that a service possesses a commitment to *quality* practice and professionalism.
- Provides public *recognition*.

3.4.3.1.2 Accreditation Attributes

As already discussed NORLD has developed national competency standards for a number of outdoor activities including – abseiling, bushwalking/trekking, canoeing, caving, rock climbing ski touring and white water rafting. During 1995 and 1996 both NORLD and VTOA compiled a number of draft competencies and accreditation attributes for outdoor guides and operators which are summarised in Table 2.

Table 2: Summary of Australian Adventure/Outdoor Accreditation Attributes

	Abseiling	Rafting	Skiing	Caving	Rock Climbing	Bushwalk	Tour Operations	Ecotour	ATOA
Guide/Instructor	x	x	x						
campcraft		x							
technical skills	x		x	x	x				x
instructional skills				x	x	x			x
communication		x	x	x		x			
people skills	x		x				x		x
organisational skills	x		x	x	x				
experience/knowledge	x		x		x	x		x	
professional development/education			x					x	x
predeparture information								x	
group management				x		x			
problem solving				x		x			
administrative skills							x		x
computer skills							x		
training	x	x	x				x		
Emergency procedures	x	x		x	x	x			x
Risk management	x	x	x	x		x			x
Safety	x	x	x		x			x	
Environmental management	x	x	x	x	x	x		x	x
First Aid	x	x	x	x	x	x			x
Insurance	x				x				x
Permits/licensing (legal)	x	x		x		x			x
Equipment maintenance	x	x	x	x	x	x	x		x
Hydrology		x							
Trip Planning		x				x	x		
Weather		x	x			x			
Navigation		x		x		x			
Hire agreement/booking					x		x		x
Building construction					x			x	x
Site policy/inspection					x	x			
Transport operation					x			x	
Occupational, health & safety						x	x		x
Customer/quality service							x		x
Financial procedures							x		x
Marketing							x	x	x
client feedback								x	x
promotional material									x
Cultural component								x	
Benefits to local community								x	
Energy/ water conservation								x	
Waste management								x	
Code of ethics									x

Sources: Compiled by author based on- Abseiling Instructor Competencies Draft Outline, Training Innovations, 1996 ; White Water Rafting Draft Competencies, NORLD 1995; National Ski Tour Leadership Draft Competencies, Ski Tour Leaders Certificate Course, 1994; Caving Draft Competencies, NORLD 1993 Symposium Report; Rockclimbing Competencies Scheme, NORLD, 1994; National Bushwalking Leadership Competencies Draft NORLD Workgroup, 1993; National Competencies Tourism Training Australia, 1994; Eco-Tour Operator Accreditation Scheme, Manditis Roberts Consultants, 1994; VTOA Accreditation Operators Manual, VTOA 1995

(*Note: Most of the sources listed here were part of the consultation process conducted by NORLD in developing the "Draft National Outdoor Recreation Competency Standards - 1996")

Of the listed attributes the most common occurring were:

- *Guide/instructor related*: including technical skills, instructional skills, communication skills, people skills, organisational skills, training, and experience/knowledge.
- *Emergency procedures*
- *Risk management*
- *Safety*
- *Environmental management*
- *First Aid*
- *Legal – permits/licensing*
- *Equipment maintenance*

Most of these attributes are similar to VTOA's accreditation attributes which include:

- Business Management Plan (to reduce visitor exposure to risk)
- Legal Requirements
Regulations, Licensing & Permits*
Public Liability Insurance Cover*(to protect visitors and operators from financial difficulties)
- Operational Procedures:
Bookings & Inquiries System*
Accounting
Skills Verification* (to provide staff with appropriate skills & training; to protect consumers)
Buildings, Equipment and Transport
- Risk Management

Staff trained in First Aid*

Emergency Procedures Plan*

Risk Management Plan*

Workplace, Health & Safety*

- Environmentally Sustainable Business Practices*
- Professional Development Participation
- Marketing

Consumer Feedback Process

Promotional Material

- subscribes to an industry nominated Code of Ethics as a commitment to providing quality service to visitors

*Core competencies

This summary of accreditation attributes and key competencies raises a number of issues in relation to consumer perception that needs to be explored.

HYPOTHESIS 7:

Consumers rate particular accreditation attributes more highly than others.

HYPOTHESIS 8:

Accreditation attributes can be grouped into several key categories.

HYPOTHESIS 9:

There is a positive relationship between the rating of key accreditation attributes and the demographics of the consumer

3.5 Consumer Decision Making

A decision is “the selection of an action from two or more alternative choices” (Schiffman, 1991, p. 550). Today consumers considering a purchase of a product or service are faced with many choices. A ‘no choice’ decision is very rare. In competitive business environments it is very important to know how consumers make choices.

3.5.1 Purchasing a service product - key issues

There are a number of issues that relate specifically to the consumer’s choice of service products and which ultimately affect the provision and marketing of services. These issues relate to *intangibility*, *environmental concerns* and *consumer protection*.

Services are *intangible* products, which means that a service cannot be seen, heard, examined, or felt in advance of purchase. Therefore it is essential for marketers of service products to know the consumers needs and interest in order to develop effective marketing strategies.

In recent years there has been increased public concern regarding impacts on the *environment* and issues relating to resource depletion. Consumer research has revealed that a large number of socially concerned consumers favour environmentally friendly products. (Schiffman, 1991)

Growth in the consumer movement has created a need to understand how consumers make purchase decisions. Consumer research has sought information on consumer perception, marketing strategies and promotion information. This research has provided government and *consumer protection* advocates with a number of

recommendations concerning consumer legislation. The Fair Trading Act and Trade Practices Act are examples of consumer protection legislation enforced in Victoria.

3.5.2 Perceived Risk

Consumers constantly make decisions in relation to services to buy. The outcomes (or consequences) of these decisions are often uncertain and so the consumer faces some degree of “risk” when making a purchase decision. Schiffman (1991, p. 180) defines perceived risk as ‘the uncertainty that consumers face when they cannot foresee the consequences of their purchase decisions’. In this definition Schiffman highlights two dimensions of perceived risk: *uncertainty* and *consequences*.

Mowen (1990, p. 101) describes perceived risk as being “conceptually fuzzy” but agrees that perceived risk may be defined as ‘a consumer’s perception of the overall negativity of a course of action based upon an assessment of the possible negative outcomes and of the likelihood that those outcomes will occur.’ Mowen’s definition consists of two major concepts – the negative outcome of a decision and the probability that these outcomes will occur.

Both perceived risk definitions are similar in content. Mowen and Schiffman agree that any decision a consumer makes involves uncertainty.

The degree of perceived risk and the consumer’s tolerance for risk-taking are factors that influence purchase strategies. It is risk that is perceived, and not real risk, that influences consumers (Schiffman, 1991). The amount of money involved in the purchase is not directly related to the amount of risk perceived. Purchasing a cheap

item such as toothpaste can be as great a risk to the consumer as selecting a microwave.

Consumers perceive risk when making service/product purchases because of a number of issues - having very little or no experience in the purchase they are considering; having had an unsatisfactory experience in the past and are concerned about making a similar mistake; limited knowledge; limited finance; or lack of confidence. Mowen (1990) states that some consumers appear to seek risk in order to raise activation levels. (Risk seeking will be explored further in section 3.5.3.2)

3.5.2.1 Types of Perceived Risk

The major types of risk that consumers perceive in making product decisions include:

Functional or performance risk – the risk that the product will not perform as expected.

Physical risk – the risk that the product will physically harm the buyer.

Financial risk – the risk that the product will not be worth its cost or that it will harm the consumer financially.

Social risk – the risk that a poor product choice may result in social embarrassment or derision.

Psychological risk – the risk that a poor product choice will bruise the consumer's ego or self image.

Time risk – the risk that the time spent in product purchase may be wasted if the product does not perform as expected. (Schiffman, 1991, p. 180; Mowen, 1990, p.164)

Mowen includes an additional risk: *opportunity loss* – the risk that by making one purchase the consumer will miss out on doing something else.

3.5.2.2 Influencing Factors

The amount of risk perceived depends on individual consumer characteristics. High-risk perceivers limit their product choices to a few safe alternatives. Whereas low-risk perceivers tend to make their choices from a much wider range of alternatives. These consumers would rather risk a poor selection rather than limit the number of alternatives from which they can choose. Low-risk perceivers also perceive fewer risks in buying a new product than do high-risk perceivers.

Situational factors may also influence the perception of risk. Voluntary activities (such as choosing a ski vacation) are generally perceived as having less risk as opposed to involuntary activities, such as undergoing surgery.

3.5.2.3 How Consumers Handle Risk

Consumers have developed a number of strategies for reducing perceived risk. These strategies enable them to behave with more confidence when making product decisions. These strategies include:

Seeking out information through informal (friends, family) sources and formal (advertising, salespeople) sources.

Being brand loyal

Buying through major brand image

Buying through store image

Buying the most expensive model

Buying the least expensive model

Reassurance: money-back guarantees, warranties, government and private laboratory tests, purchase trials.

(Schiffman, 1991; Mowen, 1990)

According to Schiffman (1991) the most favoured strategies to reduce perceived risk tend to be extended warranty, the products perceived quality, and the manufacturers perceived reputation. The least favoured include buying the most expensive model, private laboratory tests, money-back guarantees, and endorsements.

This suggests that marketers should first determine the kinds of risk perceived by potential customers and then create a mix of 'risk relievers' tailored to their markets. As suggested by Manditis Roberts and as illustrated by the various accreditation programs presented, accreditation may protect the consumer and reduce purchasing risks. But the role of accreditation as a risk reducer has not been fully explored.

3.5.3 Consumer Decision Making

A number of consumer decision-making models have been developed in an attempt to order and integrate the huge amount of information known about consumer behaviour.

A sophisticated decision making model has been developed by Howard-Sheth (Schiffman, 1990).

3.5.3.1 The Howard-Sheth Model

X Howard-Sheth developed a theory of consumer decision making. "It is a sophisticated integration of the various social, psychological, and marketing influences into a coherent sequence of information processing" (Foxall, 1990, p. 10). This model illustrates the elaborate use of unobservables, representing intervening

variables and hypothetical constructs in an attempt to account for observed consumer choices. The model in Figure 3 distinguished between three stages of decision making.

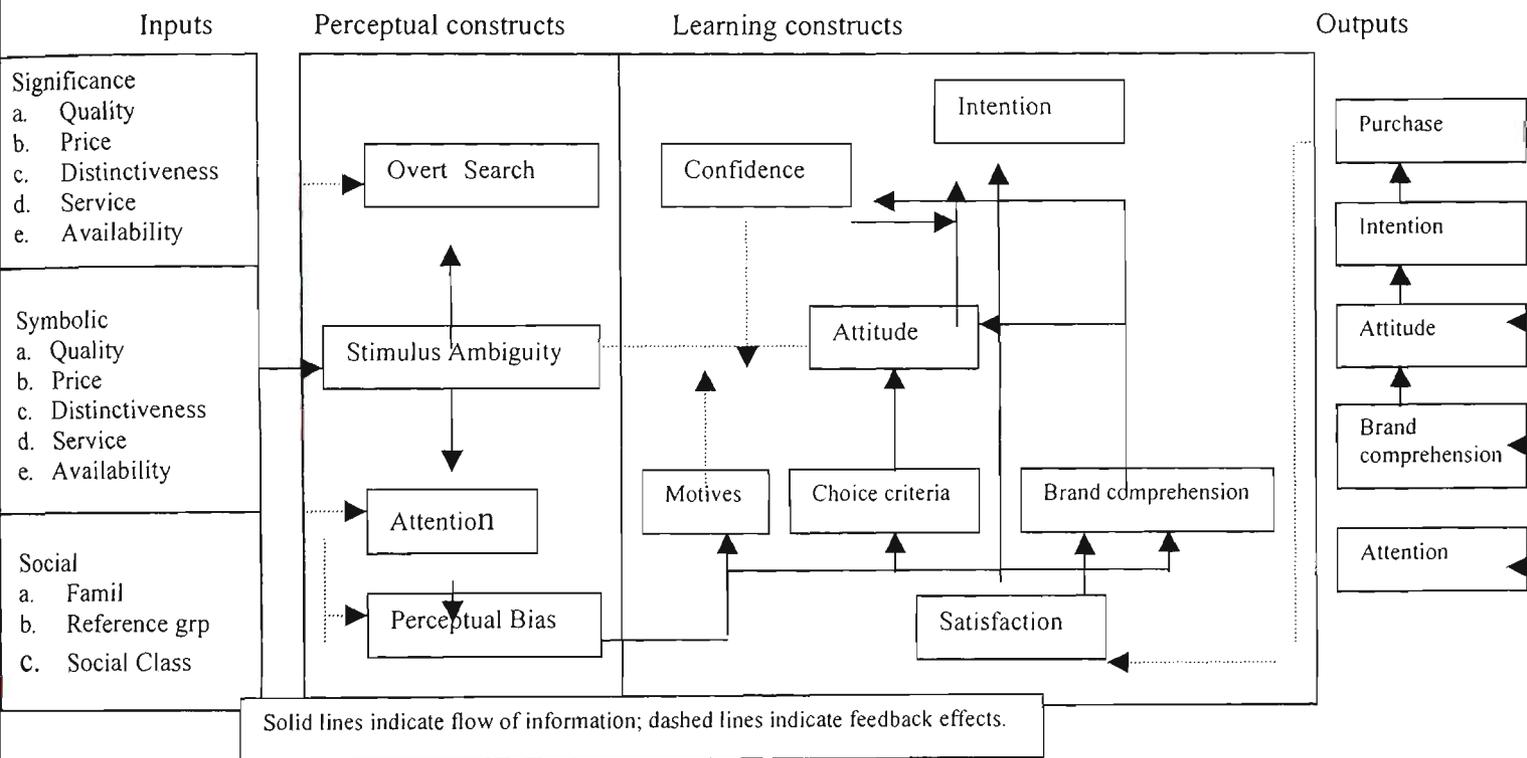


Fig 3. Simplified Version of the Howard-Sheth Model of Buyer Behaviour
 Source: Leon Schiffman and Leslie Lazar Kanuk, *Consumer Behaviour*, (1990, p. 579).

- *Extensive problem solving* is the first stage which requires a great amount of information prior to purchase. The speed of decision making is slow.
- The second stage is *limited problem solving* requiring a moderate amount of information. The speed of decision making is moderate.
- The third stage is identified by *routinised response behaviour*, which requires only a little amount of information. The speed of decision making is fast.

The Howard-Sheth model consists of four major sets of variables: *inputs*; *perceptual and learning constructs*; *outputs*; and *exogenous* (external) variables not directly part of the decision making process, including consumer personality traits and time pressure.

3.5.3.1.1 Inputs

These variables are stimuli in the consumer's environment that inaugurate the purchase process. There are three types of stimuli.

Physical brand characteristics (*significance stimuli*) include quality, price, distinctiveness, service and availability. These inputs influence the consumer directly through the brand's attributes. (Note: physical brand characteristics of adventure tourism products have already been discussed.)

Verbal/visual product characteristics (*symbolic stimuli*) derive from the same factors as the significance stimuli and are portrayed in the mass media and by salespeople. These inputs influence the consumer indirectly.

Social environment inputs (family, reference group) are influences internalised by the consumer before they can affect the decision process.

“In the process of learning, the consumer's motives, attitudes and comprehension of the brand determine the degree of confidence he or she is willing to place in it, their purchase intentions and actual purchase behaviour. The extent to which the buyer is satisfied with the purchase feeds back as modifying information that affects attitudes, confidence, purchase intentions and subsequent activity” (Foxall, 1990, p. 10).

3.5.3.1.2 Perceptual and learning constructs

The psychological variables that are assumed to operate in the consumer decision making process are the central component of the model. As these are abstractions they are neither easily defined nor directly measurable. Perceptual constructs are hypothetical terms that explain the cognitive activity of consumers and refer to internal information processing (Foxall, 1990). Learning constructs include

consumer's goals, brand information in the evoked set, criteria for evaluating alternatives, preferences and buying intentions. Learning constructs are the products of information processing.

The linkages between the perceptual and learning variables and other variables in the other segments of the model make the Howard-Sheth model distinctive.

3.5.3.1.3 Outputs

The output is the act of purchase itself and also includes each learning and perceptual construct variable (attention, brand comprehension, attitudes, and intention). Each variable has a corresponding output.

The Howard-Sheth Model can be used to analyse the choice of adventure tourism products by inexperienced consumers. In interpreting this model it could be said that emerging adventure tourists have low attitude strength. The product class would be poorly defined and the consumer would be unable to discriminate among the available brands. In this case the prospective consumer is said to engage in extended problem solving and actively seek information in order to reduce high Brand Ambiguity and take prolonged deliberation before deciding which service to buy, or whether to risk buying at all.

The inputs component of the model is of particular relevance to the analysis of adventure tour choice. Using this information it could be inferred that the physical brand characteristics or attributes of quality, price, distinctiveness, service and availability (significance stimuli) are affected by accreditation. If this is the case the

accreditation of an adventure tour operation could influence the consumer's decision making directly. It could be suggested that accreditation may not influence all consumers in the same way.

HYPOTHESIS 10:

There is a difference with respect to demographics between those with high beliefs that accreditation affects choice of an adventure tour experience and those with low beliefs.

3.5.3.2 Purchasing of Services

Purchasing of services is not significantly different from purchasing manufactured goods but services do have a number of characteristics that should be considered.

3.5.3.2.1 Promotion and Marketing

Service promotion and marketing tends to be aimed directly at the client and are based on intangibles, such as the reputation of the supplier. Marketing of services often requires educating the client about problems they don't know they have. Referrals of service products are important. (Schiffman, 1991)

Schiffman (1991) suggests that employees play a central role in the marketing of services, both internally and externally. Schiffman believes that employee development programs together with effective recruitment, training, motivation, communication and retention strategies can more easily influence customer perceptions of service quality, customer loyalty and satisfaction.

The marketing process of a service should recognise that merely providing the service is not enough, monitoring the perceptions of the client regarding quality and delivery of the service and overall satisfaction need to occur. Use of this feedback can improve the quality of the services provided (Schiffman, 1991).

3.5.3.2.2 Marketing Ethics

Schiffman (1991, p. 632) defines societal marketing as “the need for marketers to fulfil the needs of the target audience in ways that improve society as a whole while fulfilling the objectives of the organisation”. Ethics deals with the methods and intentions of a particular behaviour, which place greater weight on personal and social values than on economic values.

Consumers have needed to be protected from unethical behaviours in the marketing of services. Organisations who attempt to increase market share and make quick profits may resort to unethical marketing tactics. Examples of unethical marketing behaviour include: use of high price to connote quality; playing down the safety risk involved in particular activities; or deceptive advertising – promising an experience that cannot be provided.

Industry-wide self-regulation has attempted to protect the consumer by developing, policing and if possible enforcing industry codes of ethics. Schiffman (1991) believes that if government regulation is often the outcome of public outcry about unethical practices, then self-regulation may ward off the need of government intervention in industry practices.

3.5.3.2.3 Transaction

The purchase of a service is seen as an expense rather than an acquisition, as is the case with products. The difference with service transactions is that the consumer is unable to take possession of a service.

3.5.3.2.4 Pricing

The pricing of a service is based on benefits and value to the user. The benefits are often intangible and are not as easy to compare as products. A service usually has fewer discounts, deals, premiums and coupons than a product.

3.5.3.2.5 Standardisation

Services are less standardised than products and due to labour dependency their quality is inconsistent over time. A great deal of research has focussed on ways to improve existing services. Research has revealed that consumers use similar criteria in evaluating service quality regardless of the type of service (Schiffman, 1991).

Valerie et al. (1988) attempted to define service quality by grouping criteria into ten key categories which they called service quality determinants (see section 2.4.2 for details).

The unique qualities of a service highlight the difficulty faced by the consumer when purchasing a service. Accreditation could be seen as a means of protecting the consumer and providing an assurance in relation to marketing ethics; consistency; and appropriate pricing. But the influence of accreditation in providing assurance may also vary from consumer to consumer.

HYPOTHESIS 11: χ

There is a difference with respect to demographics between those with high beliefs that they would pay more for accreditation and those with low beliefs.

HYPOTHESIS 12: χ

There is a difference with respect to demographics between those with high beliefs that accreditation should be compulsory and those with low beliefs.

HYPOTHESIS 13: χ

There is a difference with respect to demographics between those with high beliefs that more information needs to be provided on accreditation and those with low beliefs.

3.5.4 Consumer Choice and the Importance of Selection Attributes

A number of research studies have attempted to define the process that consumers go through in making a purchase decision.

Crompton and Ankomah (1993) have expanded on a conceptual model in an attempt to explain how individuals make a purchase decision when confronted with a range of alternatives. This decision making model uses choice sets to explain the decision making process.

The use of choice sets is applicable when: “a purchase is a new or modified task in which individuals typically seek information and evaluate alternatives; and when the purchase entails some degree of perceived risk and implies a reasonably high level of involvement” (Crompton and Ankomah 1993, p. 462). Improving the standard and quality of service to tourists is a priority and considered being essential to winning

repeat visits and word-of-mouth endorsement. Choice set conditions then apply when consumers select a tourism experience such as those provided by tourism operators as defined in this research.

Crompton and Ankomah (1993) describe vacation choice in three sequential stages. This hierarchical process has been utilised by other researchers exploring the decision making process (Hill and Shaw, 1995).

The three stages include:

Early consideration or awareness set: at this stage the consumer considers possibilities. The importance of advertising is stressed, as information at this stage could help lead to a final choice.

1. Late consideration or evoked set: in this step the number of destinations or experiences are narrowed down.
2. Final choice decision: the purchase or choice is made.

Crompton and Ankomah (1993) discussed decision-making rules in relation to choice making and highlight the relevance of attributes. These researchers proposed five main rules; two are described as compensatory. 'Compensatory' refers to when a weakness on one attribute is compensated by its strength in another. In this case consumers evaluate destinations across a number of different attributes and decide by summing across the attributes.

The two compensatory rules are:

1. The unweighted linear compensatory rule. Using this rule a consumer sums the attributes and then chooses the destination whose final score exceeds a certain cut-off total.
2. The weighted linear compensatory rule is similar but the consumer rates the attributes by importance before being summed.

There are three noncompensatory rules, which refer to when tourists evaluate on two or three key attributes and eliminate destinations that are inadequate in relation to these key attributes.

3. The conjunctive rule reflects an extreme emphasis on the negative end of attribute scales.
4. The disjunctive rule focuses on the positive end and a destination is chosen if it is seen to be superior on one or more attributes.
5. The lexicographic rule uses all attributes and evaluates the most important attribute first and then the second and so on.

Little work has been carried out on decision-making rules and although Crompton and Ankomah (1993) have studied the concept of decision making in depth they do acknowledge that no consistent patterns have emerged. A number of researchers disagree as to when the most attribute processing takes place, ie. whether it is early or late in the choice process. Crompton and Ankomah believe that the lexicographic and unweighted linear compensatory rules are most frequently adopted. This is supported by the trade-off theory described by Claxton (1987) in his study of conjoint analysis.

Crompton and Ankomah conclude that the individual's use of decision rules is influenced by accessibility and quality of information; information processing capacities; and the degree of information development between destinations.

However Um and Crompton (1992) suggest that potential travellers make a destination choice by simplifying complex destination attributes into facilitators and inhibitors. "Those beliefs about a destination's attributes which help to satisfy a potential traveller's specific motives are termed facilitators, whereas those attributes which are not congruent with his or her motives are termed inhibitors" (1992, p. 19). It could be suggested that some consumers considering purchase choices see accreditation attributes as facilitators. But what do consumers know about the accreditation of adventure tour operators and is there enough information available?

It is understood that there are no conclusive findings in relation to choice making in the area of tourism research. But studies by several researchers make reference to the importance of consumers interpreting attributes of a destination as part of the decision making process (Um and Crompton, 1992; Mayo, 1973). The importance and identification of the dominant attributes of the accreditation of tour operators is of particular relevance to this study. /

HYPOTHESIS 13: ✕

There is a difference with respect to demographics between those with high beliefs that more information needs to be provided on accreditation and those with low beliefs.

HYPOTHESIS 14: ×

The items in the rating of accreditation attributes are able to predict the consumers rating of accreditation importance.

3.6 How Do We Measure The Attributes Of The Accreditation Of A Tourism Experience?

3.6.1 The Attributes of a Service

If accreditation is a means of measuring the quality or standard of an adventure tour experience, or in other words its service, it is necessary to define what the attributes of service should be. In attempting to define these attributes this study reviewed research by Crompton and Love. They defined *quality of opportunity* as the “quality of the attributes of a service that are under the control of a supplier” whereas “*quality of experience* involves not only the attributes provided by the supplier but also the attributes brought to the opportunity by the visitor” (1995, pp. 12). Researchers agree that although quality of experience can be influenced by the input of managers these managers are unable to control what consumers bring to an experience. This study will focus on *quality of opportunity*, ie. the attributes that can be controlled by the operators.

A number of studies have attempted to measure the dimensions or attributes of a service.

3.6.2 Development of SERVQUAL

In response to a need to measure service Parasuraman et. al. (1985) reviewed studies that investigated service quality and conducted exploratory research to develop a model of service quality. They originally developed an instrument (SERVQUAL) to

measure quality service across a range of services. Ten categories were intended to evaluate consumer's perceptions and expectations of service. The categories included: reliability; responsiveness; competence; access; courtesy; communication; credibility; security; understanding/knowledge and tangibles. With further research Parasuraman et. al. reduced the items to five individual dimensions (or attributes): tangibles, reliability, responsiveness, assurance and empathy. Each of these dimensions described particular aspects of service:

- Tangibles:** Appearance of facilities, equipment, personnel and communication materials.
- Reliability:** Ability to perform the promised service dependably and accurately.
- Responsiveness:** Willingness to help customers and provide prompt service.
- Assurance:** *Competence:* Possession of the required skills and knowledge to perform the service.
Courtesy: Politeness, respect, consideration and friendliness of contact personnel.
Credibility: Trustworthiness, believability, and honesty of the service provider.
Security: Freedom from danger, risk, or doubt.
(Assurance is summarised as - knowledge and courtesy of employees and their ability to convey trust and confidence.)
- Empathy:** *Access:* Approachability and ease of contact.
Communication: Keeping customer informed in language they can understand and listening to them.

Understanding the Customer: Making the effort to know customers and their needs.

(Empathy is summarised as - caring, individualised attention the firm provides its customers.)

(Zeithaml et al. 1990, pp. 21, 22, 25, 26)

There has been a great deal of discussion of the SERVQUAL instrument in relation to its validity and reliability. Although a number of scholars would agree that quality is concerned with the difference between expectations and perceptions, researchers such as Carman question the ability to measure both expectations and perceptions in the same administration (Le Blanc, 1992). Even if SERVQUAL could accurately measure the quality of a service researchers are not sure what role or importance “quality” plays in buyer choice. For this reason the SERVQUAL instrument will not be used as the method of measuring consumer’s perceptions in this study.

Although the SERVQUAL instrument will not be used in this study the five dimensions provide information which may be useful in the creation of accreditation attributes/features in relation to adventure tour operators.

3.7 Conclusions

3.7.1 Implications for further research

As a result of the literature review a number of conclusions can be made:

There is movement towards minimising regulations with the government currently focussing on identifying feasible alternatives. IATA and AFTA accreditation systems are examples of successful industry self-regulatory programs.

Adventure tourism is an attractive alternative to mass tourism as it caters for individual needs, has close contact with nature and provides new and different experiences. Adventure tourism appeals to a particular market segment. Studies of this segment did not agree on the characteristics and tended to focus on tourism in general and not specifically adventure tourism so there is a gap in information available about adventure tourists.

There is a need for well-trained, experienced and professional adventure tour operators who can meet the expectations of adventure tourists and who provide safe experiences. This indicates a need for programs such as ATOA's accreditation program. ATOA's accreditation program has been accepted by a number of operators and has the support of the government and other tourism industry bodies.

Despite this success the impact of accreditation on consumer choice is still unclear.

The literature relating to consumer choice highlighted:

- The impact that information provided at the appropriate time can have on consumer choice. This has major implications for the marketing of adventure tours and the role that accreditation can play.
- The relevance of the attributes of adventure tour operations in consumer decision making. The lexicographic and unweighted linear compensatory rules are seen as the most frequently adopted means of decision making by consumers.
- The need to identify the attributes of adventure tour operators that may facilitate or inhibit consumer decision-making and the role that accreditation plays.
- The importance of inputs (Howard-Sheth model) in influencing consumer decision-making and their potential relevance to accreditation attributes.

- Accreditation may be a risk-reducer in consumer choice playing a key role in promoting, marketing standardising service quality and ensuring appropriate pricing.

A number of studies on service quality and its dimensions indicate some concerns regarding the measurement of customer perceptions and expectations. It also highlighted that quality of service is not necessarily the only attribute considered by consumers when making a purchasing decision.

There is a lack of research into the consumer's perception of the accreditation of adventure tours and the importance of accreditation in consumer choice.

This literature review has resulted in the formulation of a number of hypotheses which are summarised below.

3.7.2 Hypotheses

The hypotheses relate to the adventure tourism consumers and their perception of the accreditation of adventure tour operators.

HYPOTHESIS 1:

Consumers of adventure tourism products rate accreditation highly.

HYPOTHESIS 2:

There is a positive relationship between the importance of accreditation and the demographics of the consumer

HYPOTHESIS 3:

There is a difference with respect to demographics between those with high beliefs that accreditation is important to safety and those with low beliefs.

HYPOTHESIS 4:

There is a positive relationship between consumer demographics of tourists and the degree of risk of the adventure tourism activity they select.

HYPOTHESIS 5:

There is a positive relationship between consumer demographics of and the size and category of operator they select.

HYPOTHESIS 6:

The demographic details of the consumers of adventure tourism products will vary in relation to age, gender, family, salary and education.

HYPOTHESIS 7:

Consumers rate particular accreditation attributes more highly than others.

HYPOTHESIS 8:

Accreditation attributes can be grouped into several key categories.

HYPOTHESIS 9:

There is a positive relationship between the rating of key accreditation attributes and the demographics of the consumer.

HYPOTHESIS 10:

There is a difference with respect to demographics between those with high beliefs that accreditation affects choice of an adventure tour experience and those with low beliefs.

HYPOTHESIS 11:

There is a difference with respect to demographics between those with high beliefs that they would pay more for accreditation and those with low beliefs.

HYPOTHESIS 12:

There is a difference with respect to demographics between those with high beliefs that accreditation should be compulsory and those with low beliefs.

HYPOTHESIS 13:

There is a difference with respect to demographics between those with high beliefs that more information needs to be provided on accreditation and those with low beliefs.

HYPOTHESIS 14:

The items in the rating of accreditation attributes are able to predict the consumers rating of accreditation importance.

CHAPTER 4

METHODOLOGY

4.1 Introduction

The methodology chapter outlines the research design for the primary research conducted to ascertain the consumer's perception of the accreditation of adventure tour operators. The methodology process covered in this chapter includes the questionnaire design which was preceded by accreditation attribute definition. The definition of these attributes was a key component of this study. The description of the data gathering includes the sample selection process, the pilot study on perceived risk and finally the distribution method.

4.2 Research Design

Quantitative research was used to obtain primary data from consumers.

4.2.1 The Multivariate Approach

To understand the consumer's perception of accreditation attributes and the influence on choice this author used multi-variate research techniques. The attributes considered in the accreditation of an adventure tour operation are multidimensional and included such factors as legal requirements, environmental management, safety, and staff expertise.

According to Zikmund, "when problems are multidimensional and three or more variables are involved we utilise multivariate analysis. Multivariate statistical methods allow the effects of more than one variable to be considered at one time" (1994, p. 574).

There are several advantages to multivariate research. It provides knowledge of how consumers perceive accreditation attributes and their importance in the choice of adventure tour operators.

The research has been designed to:

- ascertain the key accreditation *attributes* in the accreditation of an adventure tour operator
- ascertain the importance of accreditation to consumers of adventure tours
- define the market segment for commercialised adventure tours

The research design considered the analysis techniques to be employed. The techniques, to be discussed in detail in chapter 5, included mean ratings, factor analysis, chi-square analysis, ANOVAs and discriminant analysis.

4.3 Questionnaire Design

4.3.1 Defining Accreditation Attributes to be Tested

Accreditation has been viewed by tourism industry leaders as a means of progressively raising the professionalism and standards of the tourism industry and as a potential marketing strategy for the small business operator. To fully explore tourism accreditation it has been necessary to define the key attributes. As well as reviewing current literature a number of interviews were held with industry managers and tourism operators to assist in the initial definition of these attributes.

The order of the tasks performed to define the attributes relevant to the accreditation was:

1. A review of current industry and academic studies relating to adventure tourism.

An assessment was made of previous adventure tourism studies, which have focussed on accreditation in order to compile a list of attributes relating to the selection of adventure tours.

2. Personal interviews were conducted with managers at VTOA and Tourism Training Victoria to compile a list of accreditation attributes for the respondent questionnaire.

3. Informal interviews were conducted with potential tourists to ascertain the buyer's perspective of important attributes.

On completion of this research a final list of attributes was compiled and was grouped into categories.

4.3.1.2 Categories of Accreditation Attributes

The final list of accreditation attributes is summarised in Table 3. Once the attributes were created and agreed upon a rating scale was designed to measure consumer perceptions.

Table 3 Categories of Accreditation Attributes

ACCREDITATION CATEGORY	Attributes
PROGRAM ATTRIBUTES	
<p>Quality Assurance</p> <p>Risk and Emergency Management</p> <p>Bookings/inquiries procedures</p> <p>Equipment maintenance</p> <p>Skills Qualifications</p> <p>Ongoing Professional development</p> <p>Environmental management</p> <p>Sustainability of the environment</p> <p>Code of ethics</p> <p>Experience & knowledge</p> <p>Legal requirements</p> <p>Marketing</p>	<p>professional performance of adventure tour staff.</p> <p>the perception that quality is related to the price of the experience.</p> <p>appropriate pricing.</p> <p>a means of guiding the consumer in the choice of adventure tourism experience.</p> <p>guarantees that the experience is worth the money it costs.</p> <p>giving the consumer confidence that the adventure experience will provide an excellent experience.</p> <p>customer satisfaction.</p> <p>personalised service.</p> <p>quality and performance.</p> <p>provision of a good time.</p> <p>better financial management.</p> <p>staff friendliness.</p> <p>reducing the risk of injury to customers using adventure tour activities.</p> <p>raising awareness of unsafe practices.</p> <p>informing customers of associated dangers</p> <p>emergency planning</p> <p>money refunds</p> <p>maintenance of transport and equipment</p> <p>care of animals</p> <p>organisation and planning</p> <p>staff training in technical skills</p> <p>qualifications of guides and leaders</p> <p>people skills</p> <p>first aid training</p> <p>instruction and communication skills</p> <p>staff expertise</p> <p>meeting minimum standards</p> <p>continual improvement</p> <p>openness to change by following up customer complaints</p> <p>minimising damage to the environment.</p> <p>conservation of the environment.</p> <p>customer care of the environment.</p> <p>protection of the environment so it is preserved for future use.</p> <p>customers information on how to care for the environment.</p> <p>the ethics of the operator</p> <p>honesty and fairness</p> <p>staff being appropriately experienced</p> <p>the organisation operating legally</p> <p>appropriate building construction</p> <p>protection of consumer's rights</p> <p>using accreditation as a marketing tool</p> <p>accuracy of advertising</p> <p>how to attract business</p>
IMPORTANCE ATTRIBUTES	
<p>Voluntary V's Mandatory</p> <p>Price/Value</p> <p>Choice Influence</p> <p>Safety Assurance</p> <p>Improves quality/professionalism</p> <p>Consumer Information</p>	<p>all operators should obtain accreditation before they can start up a tour business.</p> <p>accreditation is a voluntary process.</p> <p>consumers would pay more for accreditation</p> <p>accreditation is expensive</p> <p>accreditation is one of the most important characteristics sought by consumers</p> <p>consumers would choose and accredited operator over a non-accredited operator</p> <p>assures that the operation is safe for consumers</p> <p>accreditation provides quality, value for money experiences</p> <p>the public wants to know more about accreditation</p>

Source: Bergin, 1998

4.3.1.3 Rating Accreditation Attributes and Importance

To test consumer perceptions of the accreditation of accreditation attributes the Likert scale was used. Respondents were required to indicate their preferences by marking how strongly they agreed or disagreed with each statement. Respondents chose from seven alternatives.

This scale has been chosen because, according to Zikmund (1994), it is appropriate to measure psychological attributes such a preferences.

4.3.1.4 What was asked

The first and most important consideration related to the aim of this study:

- The identification of key accreditation attributes by consumers.
- The importance of the accreditation of the tour operation to consumers.

Questions were designed (based on identified attributes) with the intention of collecting data to test the hypotheses.

4.3.1.5 Components of the Questionnaire

The questionnaire consisted of three parts, one of these parts provided fixed alternative questions to encourage successful completion through the provision of choice. In these fixed alternative parts the respondents were required to circle the appropriate number. The three parts included:

Part A: Accreditation Attributes

Respondents were asked to indicate their agreement on accreditation attribute and accreditation importance statements (as determined by initial research). Respondents used the Likert scale as indicated in section 4.1.3.

Part B: Open-ended Questions

Two open-ended questions provided respondents with the opportunity to:

- list one or two items that are the most important attributes of accreditation
- indicate what other accreditation characteristics should be considered for the accreditation of an adventure tour operator

Part C: Background Data

To include information on each respondent the respondents were asked to complete answers to the following statements:

- Adventure activity
- Gender
- Age
- Salary
- Family

This information was used to discriminate between groups and to identify any variations in perceptions.

The outdoor environment in which respondents would be completing the questionnaire was also considered in the questionnaire design.

4.3.1.6 Pretesting

It was understood that the questionnaire would require more than one draft. The questionnaire was pretested with ten individuals. This was done in an interview situation so that feedback was possible.

4.3.1.7 Pilot Testing

Once the questionnaire was drafted to its final stage it was pretested in a pilot test. This was achieved by personal interview with the Chief Executive Officer of VTOA and Tourism Victoria managers to receive feedback on:

- questionnaire design and its content
- avenues for dissemination of questionnaire
- the possibility of endorsement

Ten pilot questionnaires were also distributed to potential consumers of adventure tours.

Upon assessment of feedback from industry personnel the questionnaire was further refined to result in the final questionnaire format which is presented in Appendix 1.

4.4 Data Gathering Method

4.4.1 Sample Selection

VTOA 's membership database was selected as a means of identifying the sample to be surveyed. Although not exhaustive it is one of the most comprehensive lists of adventure tour operators in Victoria.

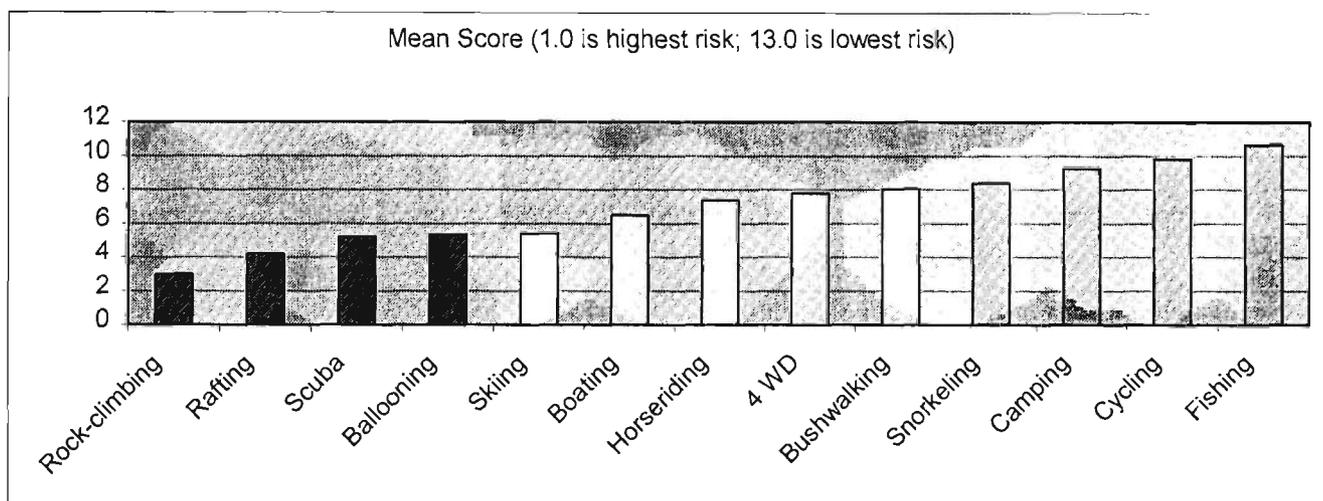
The sample was selected on the basis of the activity offered. The literature review in chapter three highlighted that consumer perceptions of accreditation may be related to the risk associated with particular adventure activities. Therefore the selection of adventure tour activities for the survey was based on classifications by perceived risk.

4.4.1.1 Pilot Study on Perceived Risk

To classify adventure activities based on perception of risk a pilot study of fifty respondents was conducted. The respondents were asked to rank adventure tour activities by order according to perceived risk. The respondents were selected from a convenience sample of undergraduate students at Victoria University of Technology

The results of the pilot survey rated rock-climbing as the highest risk activity and fishing/camping as the lowest risk activity. Figure 4 indicates rankings in order from the lowest perceived risk to the highest perceived risk.

Figure 4 Mean Scores for Perceive Risk



A comparison of differences in perceived and real risk was not an aim of this study but could impact on the need for accreditation and is an area that requires future research.

Due to difficulties associated with surveying the entire range of adventure tour activities the author decided to select the survey sample from the results of the perceived risk pilot study results. To ensure a representation of all tiers of risk

associated with adventure tour activities a stratified sample process was used where subsamples for each risk category were drawn utilising a random sampling approach. Three activities were selected from each category of low, medium and high risk, totalling nine activities. Some activities were excluded because of limitations due to seasonality and number of operators, eg. skiing and snorkelling.

Operators of the following adventure activities were contacted to distribute questionnaires:

- Perceived high-risk category: rock-climbing, rafting, and scuba diving.
- Perceived medium risk category: boating, horse riding, four-wheel-driving.
- Perceived low risk category: camping, cycling, fishing.

A total of 50 operators were contacted by phone to ascertain potential of distributing questionnaires to consumers. Of the 50 contacted 21 operators agreed to participate in the survey. Table 4 presents the break down of activities.

Table 4. Number of Adventure Tour Operators Participating In Survey.

Perceived Risk	Activity	Nos. of Operators
High	Rockclimbing	5
High	Rafting	2
High	Rafting/canoeing/climbing	1
High	Scuba	2
Med	Boating	1
Med	4 WD	2
Med	Horseriding	3
Med	4 WD & bushwalking	1
Low	Fishing	2
Low	Camping	1
Low	Camping & fishing	1
	Total	21

4.5 Distribution Method

To encourage a high response rate and to reduce bias and administrative error each tour operator was contacted by telephone to:

- firstly ascertain willingness to distribute questionnaires
- answer any queries
- provide personal explanation of: the aims of the questionnaire and the implementation process, (a step by step information sheet was provided to all operators)

A mail out followed the initial telephone contact in order to:

- disseminate the questionnaires
- provide a timeline for distribution and completion of questionnaires
- arrange a time for return of questionnaires
- emphasis the need for confidentiality, (post paid envelopes were provided)

A final reminder letter was sent six weeks after the initial mail out to operators who had not returned questionnaires.

4.5.1 Timeline

The questionnaires were distributed in May. Seasonality influenced the response rate as unfortunately the distribution missed the optimum adventure tourism time, which is between spring and autumn. The operators distributed questionnaires over a six-week period. The tours varied in group size from 10 to 60 participants.

A total of 575 questionnaires were distributed to operators around Victoria.

4.6 Data Collection and Recording

4.6.1 Administration of the Questionnaire

Following up the initial phone calls, information explaining how to distribute the questionnaire, was sent to all participating operators. Operators were instructed to distribute the questionnaire upon completion of the activity asking consumers to fill out and hand back the questionnaires before returning home. Postage paid envelopes were provided to return completed questionnaires.

4.6.1.1 Response Rate

Five hundred and seventy-five questionnaires were posted to twenty-one operators. Ten operators did not distribute questionnaires, mainly due to lack of customers, leaving a total of 342 questionnaires that could potentially be completed.

A total of 139 questionnaires of the 342 distributed were returned which resulted response rate of 41%. Table 5 provides details of response rates for specific activities.

Table 5. Response rate by activity

Activity	Questionnaires Sent	Questionnaire Response	Response Rate
Scuba (high risk)	40	15	38%
Boating (medium risk)	40	15	38%
Rock Climbing (high risk)	120	30	60%
4 WD (medium risk)	12	2	17%
4 WD / walks (med, risk)	40	17	43%
Rafting (high risk)	60	55	91%
Fishing (low risk)	30	5	17%
Total / Ave. total	342	139	41%

Operators who did not return questionnaires were followed up with a reminder letter which resulted in little or no response. No data was obtained on either horse-riding or

camping activities. It should also be noted that there was a low response rate from activities classified as low risk.

4.6.1.2 Computerised Data Entry

The SPSS computer program was used for analysis. Before data was entered a coding scheme was used to associate particular characters with questionnaire responses.

CHAPTER 5

RESULTS AND DISCUSSION

5.1 *Introduction*

This chapter presents the results and discusses consumer's perceptions of the accreditation of adventure tourism operators. The data collected in this survey has been analysed to answer the hypotheses developed in chapter three.

Specifically the purpose of the study was to examine the consumer's perception of accreditation in relation to:

- demographic details of the participants
- its importance in a number of key areas such as mandatory requirements, choice; price; safety and available information
- and the attributes associated with accreditation, eg. conservation, safety, expertise.

Multi-dimensional analysis has been conducted to answer the questions posed.

The analysis utilised is set out in Table 6 below. This table provides information on the analysis and the statistical procedures used in each main area. The results are presented in sections for easier comprehension in the order as presented in Table 6.

In most of the analysis the demographics were treated as the independent variables and the accreditation attributes and importance statements as the dependent variables.

As the accreditation variables used were measured using interval scales, relationships between them were assessed using Pearson Correlation Coefficients. In measuring the relationships of the demographic variables, which were measured using non-

interval scales, chi-square analysis was used. Analysis of Variance (ANOVA) was utilised to assess the relationships between accreditation and demographic variables. In this case the dependent variable was measured using interval scales and the independent variable was categorical.

5.2 Order of Hypotheses Testing.

Hypotheses 1, 2 and 8 were tested in three different stages, firstly with accreditation importance attributes, then with accreditation attributes and then finally by combining the complete list of attributes. The first two tests were used as a comparison with the complete list testing. Hypothesis 8 is discussed in section 5.11.

Table 6: Analysis and Statistical Procedures and/or Test

<i>Area of Analysis</i>	<i>Statistical Procedure and/or Test</i>
Actual demographic details of adventure tourists	Frequencies Relationship with activity and operator type (chi-square and correlation)
Accreditation importance (seven-point Likert scale)	Mean ratings Demographic differences with respect to ratings (ANOVA) Factor analysis & reliability testing
Accreditation attributes (seven-point Likert scale)	Mean ratings Frequency distribution of the most important accreditation attributes (q.55) Identification of 'other' characteristics (q.54) Factor analysis & reliability testing Demographic differences with respect to ratings (ANOVA)
All accreditation variables (ie. all seven-point Likert scale responses)	Factor Analysis & reliability testing
Comparison of high V's low accreditation importance ratings	Demographic differences (ANOVA)
Prediction of high V's low accreditation importance ratings	Accreditation attribute differences (discriminant analysis)

5.3 Demographic Details of Adventure Tourists Surveyed

HYPOTHESIS 6:

Demographic details of the consumers of adventure tourism products will vary in relation to age, gender, family, salary and education.

In considering the demographics of the respondents who participated in the survey, 'gender', 'age', 'education', 'family' and 'salary' were used. The results of the percentage of respondents from each demographic category are summarised in Table 7.

Table 7: Summary of Demographics of Respondents

Characteristics of Respondents	Percent
GENDER	
male	56
female	44
AGE	
18-24	22
25-34	39
35-44	22
45-54	14
55-64	3
EDUCATION	
some secondary	5
completed secondary	17
some tech/comm/trad/	15
completed uni/tertiary	45
postgraduate qual	18
FAMILY	
married, children	35
married, no children	14
single	46
widowed/divorced	5
SALARY	
less than 9,999	13
10,000-19,999	14
20,000-29,999	15
30,000-39,999	17
40,000-49,999	23
50,000 or more	18

In comparing percentages slightly more males than females participated in the adventure activities. The largest participating group by age was the 25-34 year olds and as would be expected participation decreased as age increased.

A high proportion of participants were either single or married with children.

Sixty-three percent of respondents had tertiary/postgraduate qualifications. These results may indicate the actual mix of adventure tourists which supports Hvenegaard's (1994) findings on ecotourists and some adventure tourists or it could be because highly educated people are more likely to respond to surveys.

All of the respondents surveyed had participated in commercialised adventure activities that were either one or two day trips. The cost of most of the one-day trips was more than one hundred dollars per person, which could be considered too expensive for many low to mid income earners. This is supported by the data which shows that a large proportion (41%) of participants earned an income of \$40,000 or more.

The highest percentages for each category were:

- male
- 25-34 year old
- completed university or tertiary studies
- single
- 40,000 to 49,999 income

5.4 Relationship Between Demographics and The Risk of The Activity

Riskiness of activity of adventure activities was determined by perceived risk as defined in the pilot study described in chapter 4. In Table 8 riskiness of the activities have been categorised as follows: *High risk* activities were rock-climbing, scuba diving, rafting; *medium risk* categories were boating, four wheel driving, and bushwalking; and *low risk* activities were fishing and camping.

Table 8: Chi-square Analyses – Demographic Variable and Riskiness of Activity

<i>Respondent Characteristics</i>	<i>High Risk</i>	<i>Medium Risk</i>	<i>Low Risk</i>
GENDER			
male	58	57	50
female	42	43	50
Chi-square=.41, df=2, p=.82			
AGE			
18-44	89	65	77
45-64	11	35	23
Chi-square=7.37, df=2, p=.03*			
EDUCATION			
primary/secondary/technical or trade	39	47	50
tertiary/postgraduate	61	53	50
Chi-square=1.12, df=2, p=.57			
FAMILY			
married with chn or no chn	42	88	73
Single/divorced/widowed	58	12	27
Chi-square=16.7, df=2, p=.0002*			
SALARY			
\$0-\$29,999	51	41	50
\$30,000-\$50,000 or more	49	49	50
Chi-square=.56, df=2, p=.75			

5.4.1 Demographic Observations

Demographic details of consumers of adventure activities according to riskiness of activity are summarised in Table 8. High risk participants are mainly male, 18-44, well educated, single/divorced or widowed and of no specific income. Which is similar to medium risk participants who are also predominantly male, 18-44, well educated but married and more likely to earn more than \$30,000. The low risk participants tend to have broader backgrounds in that they can be either male or female, aged 18-44, of no particular education or income and more likely to be married.

5.4.2 Chi-Square Analysis

HYPOTHESIS 4:

There is a positive relationship between consumer demographics and the degree of risk of the adventure tourism activity they select.

Initial chi-square analysis conducted resulted in too high a number of cells with expected values less than five so chi-square was run again collapsing demographic variables so that each category only had two groupings. Gender was collapsed into 18-44 year olds and 45-64 year olds; education into primary/secondary/technical or trade and tertiary/postgraduate qualifications; family into married with/without children and single/widowed/divorced; and salary into \$0-\$29,999 and \$30,000-\$50,000 or more.

The results indicated that there were no statistically significant differences between respondents who participated in riskiness of activity with regard to – gender, salary and education. However there were statistically significant differences between respondents who participated in riskiness of activity with regard to age and family.

With respect to family, there was significantly higher number of respondent's married (with or without children) who participated in low or medium risk activities compared to singles/divorced/widowed.

The main differences with regards to age were that 89 per cent of respondents choosing high-risk activities were below 44 and only 11 per cent were 45 or older.

The largest percentage of participation for 45-64 year olds was in the medium risk category.

These differences could be explained by the physical effort required for participation in the high risk activities which could make it difficult for older age groups to be actively involved.

Because of limited studies in this area it is difficult to make comparisons. Studies by Hvenegaard (1994) and Morrison (1994) do not specifically focus on adventure tourism nor do they consider riskiness of activity.

5.5 Relationship Between Demographics and Category and Size of Operators

HYPOTHESIS 5:

There is a positive relationship between consumer demographics and the category and size of operator they select

Initially it was preferred to determine operator categories by the individual operations/brand names of those participating in the survey. Such groupings were not feasible as an initial chi-square analysis clearly indicated that there were a number of cells for which the expected value was less than five meaning that the results may not be accurate. As an alternative, operator groupings for chi-square analysis were determined by the size of the tours conducted and by the activity category. Small tours generally involve 20 or less participants and the only large adventure tour operation participating in this study was Peregrine Adventures, which was classified separately and is shown as category 1 in Table 9. Category 2 was defined as small

aqua operators and included small rafting, scuba and boating operations. Category 3 included small four-wheel drive and bushwalking operations while category 4 comprised of small rock climbing operations.

Table 9: Chi-square Analyses – Demographic Variable and Category and Size of Operator

<i>Respondent Characteristics</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>
GENDER				
male	52	50	55	72
female	48	50	45	28
Chi-square=3.94, df=3, p=.267				
AGE				
18-44	89	77	75	90
45-64	11	23	25	10
Chi-square=4.54, df=3, p=.208				
EDUCATION				
primary/secondary/technical or trade	39	30	50	52
tertiary/postgraduate	61	70	50	48
Chi-square=3.70, df=3, p=.295				
FAMILY				
married with chn or no chn	48	77	71	21
Single/divorced/widowed	52	23	29	79
Chi-square=22.44, df=3, p=.00005*				
SALARY				
\$0-\$29,999	54	30	50	62
\$30,000-\$50,000 or more	46	70	50	38
Chi-square=6.76, df=3, p=.079				

Further chi-square analysis again resulted in too high a number of cells with expected values less than five so chi-square was run again collapsing demographic variables so that each demographic category only had two groupings as described previously in section 5.3.

Further chi-square analysis resulted in no statistically significant differences between respondents in their selection of operators with regard to gender, age, salary and education. Family was the only demographic variable that showed any statistically significant differences between respondents in their selection of operator type.

Family differences were very significant in relation to participation in the smaller-lower risk operations with 77 and 71 per cent of ‘marrieds’ selecting small aqua and

4 WD/bushwalks respectively. By comparison the majority of ‘singles’ selected the higher risk activities with 80 per cent of ‘singles’ choosing small rock climbing operations and 52 per cent selecting Perergrine’s white-water rafting activities. Size of operation did not seem to affect choice. These findings support those already discussed in section 5.4 in relation to demographic relationships and riskiness of activity.

Singles may, as Mowen (1990) suggests, have a higher need to obtain optimal stimulation levels and so seek activities that are novel, complex and risky in order to raise arousal levels. Singles may also be freer of responsibilities and more able to take greater risks that will not affect others (spouse or children) if they are injured.

5.6 Mean Ratings of Accreditation Importance

HYPOTHESIS 1:

Consumers of adventure tourism products rate accreditation highly.

Table 10 Mean Ratings for Accreditation Attributes

Variable	Mean Rating	Standard Deviation
Everything else being equal I would choose an accredited operator over a non accredited operator	5.76	1.65
Accreditation is important to the safety of consumers of adventure tour activities	5.69	1.52
All adventure tour operators should be accredited	5.44	1.69
There is not enough information available to explain accreditation to the general public	5.42	1.29
Accreditation ensures that only professional operators can operate and adventure tour business	5.22	1.82
Accreditation should be obtained by all operators before they start up a tour business	5.13	1.83
An accredited operator provides quality, value for money experiences	4.61	1.45
I would be prepared to pay more money for an accredited tour experience than a non-accredited experience	4.53	1.74
An accredited adventure tour experience is more expensive than a non-accredited adventure tour	4.53	1.50
Accreditation is one of the most important characteristics I look for when I choose an adventure tour experience	4.42	1.80

The list containing ‘how important is accreditation’ statements is arranged in Table 10 in descending order by mean ratings.

All importance statements rated higher than 4.00 (neither agree nor disagree) with standard deviations falling within similar ranges. The highest rating statement - 'choosing an accredited operator over a non-accredited operator' has a mean of 5.67 (between slightly agree and agree) and a standard deviation of 1.65. This rating could indicate that there is some degree of importance related to accreditation and choice. The statement relating to 'accreditation as the most important characteristic used in choice' rated the lowest on this list with a mean of 4.42. These results could indicate that consumers see accreditation as an important factor in choice but not necessarily the most important.

These results also indicate that the consumer may not be sure about accreditation in relation to its cost and ensuring value for money. However there does seem to be agreement in believing that accreditation should be obtained by all adventure tours and that it is important to safety, professionalism and choice of operators.

Based on these results Hypothesis 1 could be supported.

5.7 Demographic Differences With Respect To Accreditation Importance Ratings (ANOVA)

HYPOTHESIS 2:

There is a positive relationship between the importance of accreditation and the demographics of the consumer.

To assess whether there were statistically significant demographic differences across accreditation importance ratings simple factorial ANOVA's were conducted using demographic variables as independent variables and accreditation importance

statements as the dependent variables. Table 11 summarises the results of this analysis listing the F-values.

Statistically significant differences exist in only two of the relationships with the demographic variables. This indicates that there were very few demographic differences across accreditation importance variables.

Based on these results Hypothesis 2 could not be supported.

Table 11: ANOVA Results – Demographic Variables and Accreditation Importance Ratings

Dependent Variables	F –VALUES				
	AGE	GENDER	EDUCATION	FAMILY	SALARY
Everything else being equal I would choose an accredited operator over a non accredited operator	0.70	0.13	0.73	0.23	1.33
Accreditation is important to the safety of consumers of adventure tour activities	0.40	0.49	1.27	0.79	0.66
All adventure tour operators should be accredited	0.58	0.09	1.09	0.27	1.61
There is not enough information available to explain accreditation to the general public	1.35	0.68	1.23	0.40	1.29
Accreditation ensures that only professional operators can operate and adventure tour business	0.88	1.42	2.03	1.03	2.06
Accreditation should be obtained by all operators before they start up a tour business	0.41	0.69	3.26*	0.38	0.99
An accredited operator provides quality, value for money experiences	0.37	0.30	1.17	1.12	0.92
I would be prepared to pay more money for an accredited tour experience than a non-accredited experience	0.57	0.09	1.88	0.15	0.98
An accredited adventure tour experience is more expensive than a non-accredited adventure tour	1.73	0.57	0.72	5.04*	0.42
Accreditation is one of the most important characteristics I look for when I choose an adventure tour experience	0.24	0.36	0.89	0.39	1.63

*Significant at the $p < 0.05$ level

5.8 Factor Analysis of the Accreditation Importance Variables

HYPOTHESIS 8:

Accreditation attributes can be grouped into several key categories.

Factor analysis using a varimax rotation resulted in the extraction of two factors with eigenvalues in excess of one, which explains 64 per cent of the total variance. The output of the factor analysis is presented in Table 12. The reliability of factor one was very high but quite low for factor two based on the calculation of Cronbach's alpha.

Table 12: Factor Analysis of the Accreditation Importance Variables

Groupings of statement items	Factor Loading	Eigen-value	Variance Explained (Percentage)	Reliability Coefficient
Reliability		5.17	51.7	0.92
All adventure tour operators should be accredited	.92			
Accreditation is important to the safety of consumers of adventure tour activities	.88			
Everything else being equal I would choose an accredited operator over a non-accredited operator	.84			
Accreditation is one of the most important characteristics I look for when I choose an adventure tour experience	.83			
Accreditation should be obtained by all operators before they can start up a tour business	.81			
I would be prepared to pay more money for an accredited tour experience than a non-accredited experience	.80			
Accreditation ensures that only professional operators can operate an adventure tour experience	.67			
Price		1.21	12.1	0.34
An accredited adventure tour experience is more expensive than a non-accredited adventure tour	.78			
There is not enough information available to explain accreditation to the general public	.76			
Total Variance Explained			63.8	

5.9 Mean Ratings of Accreditation Attributes

HYPOTHESIS 7:

Consumers rate particular accreditation attributes more highly than others.

The list containing ‘accreditation attribute’ statements is arranged in Table 13 in descending order by mean ratings. The highest three rating attributes relate to training in technical skills; organisation and planning; and legal operation.

Table 13: Mean Ratings of Accreditation Attributes

Variable	Mean Rating	Standard Deviation
Ensures that the staff will be trained in technical skills	6.15	1.15
Encourages me to believe that the adventure tour operator or guide will be organised and will have planned the tour well	6.07	1.14
Ensures that the operator is operating legally	5.97	1.31
Ensures that transport and equipment are well maintained.	5.96	1.31
Ensures that guides and leaders are appropriately qualified	5.93	1.24
Ensures that adventure tour staff will perform professionally	5.88	1.38
Ensures that the operator carries insurance which protects the consumer	5.88	1.39
Ensures that the operator or guide is aware of unsafe practices	5.88	1.29
Ensures that the operator or guide meets minimum standards	5.85	1.36
Reduces the risk of injury to customers using adventure tour activities	5.83	1.32
Ensures that the operator has planned for emergencies should they arise	5.81	1.35
Ensures that the operator be trained in first aid	5.74	1.48
Helps the operator ensure that damage to the environment will be minimised	5.71	1.39
Ensures that the staff will be appropriately experienced	5.68	1.42
Gives me confidence that the environment will be protected by the tour operator so that it will be preserved for future use	5.65	1.47
Encourages me to believe that the operator will be ethical in the conduct of business	5.62	1.42
Ensures that animals used for transportation are cared for	5.53	1.48
Enables the customer to identify operators who are higher in quality and performance	5.37	1.59
Is a marketing tool for the operator	5.37	1.44
Ensures that staff are highly skilled experts	5.36	1.36
Ensures that the adventure tour is provided as described in advertising material	5.30	1.39
Makes sure that the customer is informed of all dangers before beginning the activity/tour	5.27	1.52
Ensures that the quality of the transport used is appropriate for the environment or experience	5.04	1.51
Guides the customer in the selection of an adventure tourism experience	4.96	1.46
Guarantees that the customer will have a quality experience	4.96	1.62
Ensures that the operator will be honest and fair	4.95	1.59
Assists the operator or guide in knowing how to work with people	4.93	1.49
Ensures that the operator will act upon customer complaints	4.92	1.52
Makes sure that adventure tour operators are continually looking for ways to improve	4.85	1.62
Ensures that the experience is appropriately priced	4.79	1.72
Ensures that the customer will have an enjoyable time	4.76	1.80
Ensures a refund of money will be provided if difficulties arise	4.70	1.65
Ensures that customers receive a personalised service	4.69	1.52
Makes sure that the operator or guide knows how to communicate with the consumer	4.64	1.67
Ensures advertising is accurate and up to date	4.53	1.71
Ensures that customers will be given information on how to care for the environment	4.51	1.56
Ensures customer satisfaction	4.36	1.83
Ensures that the staff will be friendly	4.35	1.86
Helps the operator to know the type of customer their business attracts	4.23	1.72
Increases the price of the adventure tour	4.04	1.78
Is not related to conservation of the environment	3.38	1.78
Is an unnecessary bureaucracy	2.71	1.80
Is a waste of time	2.29	1.70

5.91 Frequency distribution of the Most Important Accreditation Attributes

Responses to the open-ended question asking consumers to list the most important attributes of accreditation are summarised in Table 14.

Table 14: Summary of the accreditation attributes considered most important

Accreditation Attribute	Frequency
Safety	25
Experience of operator/guide	19
Training & qualifications of staff	17
Meeting or exceeding standards	11
Environmental protection	8
Professionalism of operator/staff	8

It is interesting to note that the most frequently listed responses in Table 14 also had high mean rating scores (see Table 13).

In comparing these results with ATOA's accreditation program there are a number of similarities. The similarities exist in the high mean ratings areas of 'training in technical skills'; 'organisation and planning'; and 'legal operation'. These variables match ATOA's core accreditation competencies of:

- Legal (insurance and public liability cover);
- Operational (in the areas of skill verification, staff training in First Aid, emergency and risk management planning);

The significant consumer responses for 'safety' and 'environmental protection' are attributes also included in ATOA's accreditation but not as core competencies.

ATOA's accreditation process also focuses on operators 'meeting or exceeding standards' or competencies. The 'experience of the operator/guide' is considered

briefly in ATOA's accreditation requirements under the skills verification section where the operator assesses his/her personnel.

5.92 Identification of Other Accreditation Attributes

Only 29 percent of consumers surveyed responded to the open-ended question to consider other characteristics for accreditation. Of those who did respond most restated attributes already considered. But it is worth noting that some consumers believed that the following additional accreditation attributes should also be considered:

- Accreditation should include pricing policies.
- Need to say what standards are met and what accreditation involves.
- To include recognition of current levels already achieved.
- An expert/approving body to conduct checks/audits/reviews.
- Withdrawal of endorsement if required.
- Disclosure of tour details required by operator.
- Booking agent should have first hand experience of tour that he/she recommends.

According to consumers, operators should also:

- develop presentation skills
- have business experience
- be trained in how to deal with pressure situations
- be equal opportunity employers

5.10 Factor Analysis and Reliability Testing of Accreditation Attribute Variables

HYPOTHESIS 8:

Accreditation attributes can be grouped into several key categories

The results of the factor analysis of the accreditation attributes are detailed in Table 15 and are discussed in section 5.11

Table 15: Factor Analysis of the Accreditation Attributes

Groupings of statement items	Factor Loading	Eigen-value	Variance Explained (Percentage)	Reliability Coefficient
Customer Focus		20.63	48.0	0.96
Ensures customer satisfaction	.83			
Helps the operator to know the type of customer their business attracts	.75			
Ensures that the staff will be friendly	.74			
Makes sure that adventure tour operators are continually looking for ways to improve	.73			
Ensures advertising is accurate and up to date	.72			
Ensures that the customer will have an enjoyable time	.70			
Makes sure that the operator or guide knows how to communicate with the consumer	.70			
Ensures that customers receive a personalised service	.68			
Ensures that the experience is appropriately priced	.66			
Guarantees that the customer will have a quality experience	.60			
Ensures that the adventure tour is provided as described in advertising material	.59			
Assists the operator or guide in knowing how to work with people	.57			
Ensures that the operator will be honest and fair	.57			
Guides the customer in the selection of an adventure tourism experience	.56			
Ensures that the operator will act upon customer complaints	.54			
Enables the customer to identify operators who are higher in quality and performance	.50			
Safety		2.96	6.9	0.94
Ensures that guides and leaders are appropriately qualified	.78			
Ensures that the operator or guide is aware of unsafe practices	.77			
Ensures that the operator be trained in first aid	.76			
Ensures that the operator is operating legally	.74			

Table 15 cont.

Groupings of statement items	Eigen-value	Variance Explained (Percentage)	Reliability Coefficient
Ensures that the staff will be appropriately experienced	.70		
Ensures that the operator or guide meets minimum standards	.66		
Ensures that the operator has planned for emergencies should they arise	.65		
Ensures that staff are highly skilled experts	.60		
Ensures that the quality of the transport used is appropriate for the environment of experience	.56		
Makes sure that the customer is informed of all dangers before beginning the activity or tour	.55		
Encourages me to believe that the adventure tour operator or guide will be organised and will have planned the tour well	.54		
Competence	1.97	4.6	0.88
Ensures that adventure tour staff will perform professionally	.73		
Ensures the staff will be well trained in technical skills	.68		
Ensures that transport and equipment are well maintained.	.66		
Reduces the risk of injury to customers using adventure tour activities	.65		
Ensures that the operator carries insurance which protects the consumer	.57		
Ensures that animals used for transportation are cared for	.53		
Ensures a refund of money will be provided if difficulties arise	.48		
Environmental Protection	1.61	3.8	0.86
Gives me confidence that the environment will be protected by the tour operator so that it will be preserved for future use	.59		
Helps the operator ensure that damage to the environment will be minimised	.58		
Ensures that customers will be given information on how to care for the environment	.49		
Encourages me to believe that the operator will be ethical in the conduct of business	.45		
Resource Conservation	1.51	3.5	0.74
Is a waste of time	-.83		
Is an unnecessary bureaucracy	-.77		
Is not related to conservation of the environment	-.56		
Marketing	1.16	2.7	
Is a marketing tool for the operator	.86		
Price	1.09	2.5	
Increases the price of the adventure tour	.65		
Total Variance Explained	72		

5.11 Relationship Between Actual Demographics And Accreditation Attribute Ratings

HYPOTHESIS 9:

There is a positive relationship between the rating of key accreditation attributes and the demographics of the consumer.

To assess whether there were statistically significant demographic differences across accreditation attribute ratings simple factorial ANOVA's were conducted using demographic variables as independent variables and accreditation attribute statements as the dependent variables. Table 16 summarises the results of this analysis listing the F-values.

Statistically significant differences exist in only five per cent of the relationships with the demographic variables. This indicates that there were very few demographic differences across accreditation attribute ratings.

Based on these results Hypothesis 9 could not be supported.

Table 16: ANOVA Results – Demographic Variables and Accreditation Attribute Ratings

Dependent Variables	F –VALUES				
	GENDER	AGE	EDUCATION	FAMILY	SALARY
Ensures that adventure tour staff will perform professionally	1.55	2.16	0.38	1.39	2.12
Ensures that the staff are trained in technical skills	0.13	1.46	0.94	0.38	0.98
Reduces the risk of injury to customers using adventure tour activities	0.26	2.32	0.79	1.63	0.82
Ensures a refund of money will be provided if difficulties arise	0.00	1.97	0.69	2.78*	1.03
Ensures that the operator carries insurance which protects the consumer	0.11	0.98	0.94	3.33*	0.76
Ensures that transport and equipment are well maintained.	0.12	2.08	0.44	1.66	0.55
Ensures animals used for transportation are cared for	4.34*	2.74*	1.14	2.46	0.77
Encourages me to believe that the adventure tour operator or guide will be organised and will have planned the tour well	0.97	0.69	1.86	1.21	2.08
Helps the operator ensure that damage to the environment will be minimised	0.20	2.35	1.20	0.68	1.56
Gives me confidence that the environment will be protected by the tour operator so that it will be preserved for future use	0.39	1.89	0.93	0.75	1.44
Ensures that the experience is appropriately priced	0.05	1.83	0.69	0.71	0.52
Encourages me to believe that the operator will be ethical in the conduct of business	0.31	0.93	0.12	0.45	1.50
Ensures that the customer will have an enjoyable time	0.10	1.40	2.02	1.42	2.32*
Guides the customer in the selection of an adventure tourism experience	0.01	2.60*	0.99	0.75	1.50
Ensures that customers receive a personalised service	0.32	1.99	1.24	0.57	0.41
Is a waste of time	1.04	1.46	1.05	1.03	4.11
Ensures the operator will act upon customer complaint	1.41	0.82	0.54	0.23	0.92
Ensures that staff are highly skilled experts	1.83	0.28	3.07*	1.43	1.80
Increases the price of the adventure tour	0.00	0.18	0.65	0.91	1.61
Ensures that customers will be given information on how to care for the environment	0.65	1.47	1.10	0.62	0.55
Is not related to conservation of the environment	0.05	1.45	1.50	3.43*	1.43
Ensures that the operator will be honest and fair	0.08	1.49	0.71	0.95	0.44
Assists the operator or guide in knowing how to work with people	0.52	1.16	1.03	2.14	0.87
Ensures that the operator be trained in first aid	0.55	2.35*	0.17	1.54	4.82*
Guarantees that the customer will have a quality experience	0.57	0.77	1.34	1.28	2.27
Ensures that the operator is operating legally	0.42	0.62	0.28	0.15	1.86
Ensures that the operator or guide is aware of unsafe practices	0.24	0.50	0.40	0.37	1.26
Ensures that the operator has planned for emergencies should they arise	1.00	0.62	0.30	0.16	0.90
Is an unnecessary bureaucracy	0.65	0.56	0.34	0.55	0.77
Makes sure that the operator or guide knows how to communicate with the consumer	0.55	0.53	0.47	0.53	1.11
Ensures that the quality of the transport used is appropriate for the environment of experience	0.14	0.95	0.72	0.11	0.83
Ensures customer satisfaction	0.62	1.26	0.59	0.46	0.87
Helps the operator to know the type of customer their business attracts	0.08	0.93	1.06	0.67	0.92
Ensures advertising is accurate and up to date	0.00	1.74	1.18	1.10	0.11
Makes sure that adventure tour operators are continually looking for ways to improve	0.96	0.45	1.37	0.56	0.70
Enables the customer to identify operators who are higher in quality and performance	0.01	0.12	1.08	0.40	0.91
Ensures that the adventure tour is provided as described in advertising material	0.01	1.51	0.63	0.21	0.70
Ensures that the staff will be friendly	0.01	0.71	0.97	1.07	0.96
Makes sure that the customer is informed of all dangers before beginning the activity or tour	0.31	1.96	0.88	0.97	1.12
Ensures that the staff will be appropriately experienced	0.30	0.38	0.75	0.25	2.40*
Ensures that the operator or guide meets minimum standards	1.04	0.30	0.48	0.82	0.48
Ensures guides and leaders are appropriately qualified	0.01	0.29	0.42	0.12	1.64
Is a marketing tool for the operator	0.13	2.16	2.16	2.59	0.73

*Significant at the $p < 0.05$ level

5.12 Factor Analysis of All Accreditation Variables

HYPOTHESIS 8:

Accreditation attributes can be grouped into several key categories.

A factor analysis of the complete list of accreditation variables using a varimax rotation resulted in the extraction of nine factors with eigenvalues in excess of one, which explained 73 per cent of the total variance. The factors generally divided into groups with similar items to the prior individual analysis of accreditation importance variables and accreditation attribute variables described in sections 5.7 and 5.9. This supports the stability of the factor analysis. The output of the factor analysis of all accreditation attributes is presented in Table 17.

Table 17: Factor Analysis of the Complete List of Accreditation Variables

Groupings of statement items	Factor Loading	Eigen-value	Variance Explained (%)	Reliability Coefficient
Customer Focus		24.15	45.6	0.96
Ensures customer satisfaction	.79			
Ensures that customers receive a personalised service	.74			
Helps the operator to know the type of customer their business attracts	.71			
Ensures advertising is accurate and up to date	.69			
Ensures that the customer will have an enjoyable time	.69			
Ensures experience is appropriately priced	.69			
Ensures that the staff will be friendly	.68			
Makes sure that adventure tour operators are continually looking for ways to improve	.67			
Makes sure that the operator or guide knows how to communicate with the consumer	.66			
Ensures operator will be honest /fair	.63			
Guarantees that the customer will have a quality experience	.59			
Ensures that the operator will act upon customer complaints	.57			
Assists the operator or guide in knowing how to work with people	.55			
Guides the customer in the selection of an adventure tourism experience	.49			
Safety/Security		3.50	6.6	0.95
Ensures that the operator or guide is aware of unsafe practices	.77			
Ensures that the operator is operating legally	.76			
Ensures that guides and leaders are appropriately qualified	.71			
Ensures operator be trained in first aid	.70			
Ensures that the operator has planned for emergencies should they arise	.70			

Table 17 cont.

Groupings of statement items	Factor Loading	Eigen-value	Variance Explained (%)	Reliability Coefficient
Ensures that the operator or guide meets minimum standards	.65			
Ensures that the staff will be appropriately experienced	.62			
Ensures adventure tour is provided as described in advertising material	.57			
Ensures that the quality of the transport used is appropriate for the environment of experience	.55			
Ensures staff are highly skilled experts	.53			
Makes sure that the customer is informed of all dangers before beginning the activity or tour	.55			
Encourages me to believe that the operator will be ethical in the conduct of business	.49			
Encourages me to believe that the adventure tour operator or guide will be organised and will have planned the tour well	.47			
Reliability Assurance		2.33	4.4	0.93
Accreditation should be obtained by all operators before they can start up a tour business	.78			
All adventure tour operators should be accredited	.76			
I would pay more money for an accredited tour experience than a non-accredited experience	.73			
Everything being equal I would choose an accredited operator over a non-accredited operator	.71			
Accreditation is one of the most important characteristics I look for when I choose an adventure tour experience	.68			
Accreditation is important to the safety of consumers of adventure tour activities	.66			
Enables the customer to identify operators who are higher in quality and performance	.55			
Accreditation ensures that only professional operators can operate an adventure tour business	.53			
An accredited operator provides quality, value for money experiences	.48			
Consumer Protection		2.00	3.8	0.88
Ensures that transport and equipment are well maintained.	.67			
Ensures that the operator carries insurance which protects the consumer	.66			
Ensures that adventure tour staff will perform professionally	.61			
Ensures that animals used for transportation are cared for	.61			
Reduces the risk of injury to customers using adventure tour activities	.60			
Ensures a refund of money will be provided if difficulties arise	.60			
Ensures the staff will be well trained in technical skills	.59			
Resource Conservation		1.80	3.4	0.74
Is a waste of time	-.77			
Is an unnecessary bureaucracy	-.63			
Is not related to conservation of the environment	-.52			

Table 17 cont.

Groupings of statement items	Factor Loading	Eigen-value	Variance Explained (%)	Reliability Coefficient
Price/Cost		1.47	2.8	0.62
An accredited adventure tour experience is more expensive than a non-accredited adventure tour	.79			
Increases the price of the adventure tour	.78			
Environmental Protection		1.23	2.3	0.87
Gives me confidence that the environment will be protected by the tour operator so that it will be preserved for future use	.54			
Helps the operator ensure that damage to the environment will be minimised	.53			
Ensures that customers will be given information on how to care for the environment	.48			
Marketing		1.13	2.1	
Is a marketing tool for the operator	.81			
Consumer Information		1.11	2.1	
There is not enough information available to explain accreditation to the public	.81			
Total Variance Explained			73	

A number of the factor groupings in this analysis correspond to the competencies and processes set out in ATOA’s accreditation program. Table 18 below sets out the similarities.

Table 18: Similarities Between the Factor Analysis and ATOA’s Accreditation Competencies/Process

Factor Analysis Groupings	ATOA’s Accreditation Competencies/Process
Customer Focus	Code of Ethics / Business Planning (eg. Product and Service Quality)
Safety / Security	Legal Requirements / Code of Ethics / Risk Management / Operational Procedures
Reliability Assurance	Quality Assurance
Consumer Protection	Legal Requirements (eg. Insurance) / Operational Procedures (eg. Skills Verification) / Risk Management / Code of Ethics
Resource Conservation	Environmental Management / ATOA provides support and training to assist operators in gaining accreditation
Price/Cost	
Environmental Protection	Environmental Management / Code of Ethics
Marketing	Code of Ethics / Business Planning / Marketing
Consumer Information	ATOA encourages the use of the accreditation logo for promotion purposes. There is some information available to the consumer that is distributed via the operator.

It is also interesting to note that a number of the factor groupings are comparable to SERVQUAL dimensions as shown in Table 19.

Table 19: Similarities Between the Factor Analysis and SERVQUAL Dimensions

Factor Analysis Groupings	SERVQUAL DIMENSIONS
Customer Focus	Empathy / Responsiveness
Safety / Security	Assurance
Reliability Assurance	Reliability
Consumer Protection	Assurance / Tangibles
Resource Conservation	
Price/Cost	
Environmental Protection	Tangibles
Marketing	
Consumer Information	

5.13 Differences In Demographics With Regard To Those Who Rated Accreditation Importance Attributes Highly and Those Who Rated Them Low.

HYPOTHESIS 12:

There is a difference with respect to demographics between those with high beliefs that accreditation should be compulsory and those with low beliefs.

HYPOTHESIS 11:

There is a difference with respect to demographics between those with high beliefs that they would pay more for accreditation and those with low beliefs.

HYPOTHESIS 3:

There is a difference with respect to demographics between those with high beliefs that accreditation is important to safety and those with low beliefs.

HYPOTHESIS 10:

There is a difference with respect to demographics between those with high beliefs that accreditation affects choice of an adventure tour experience and those with low beliefs.

HYPOTHESIS 13:

There is a difference with respect to demographics between those with high beliefs that more information needs to be provided on accreditation and those with low beliefs.

Table 20: ANOVA Results – Demographic Variables and High and Low Ratings of Accreditation Importance

Dependent Variables	F –VALUES				
	GENDER	AGE	EDUCATION	FAMILY	SALARY
Accreditation should be obtained by all operators before they start up a tour business	0.07	0.13	1.81	0.64	0.75
All adventure tour operators should be accredited	0.12	0.67	0.90	0.28	1.48
I would be prepared to pay more money for an accredited tour experience than a non-accredited experience	0.98	0.35	2.44*	0.43	0.58
Accreditation is important to the safety of consumers of adventure tour activities	0.02	0.24	0.48	0.60	0.73
Accreditation is one of the most important characteristics I look for when I choose an adventure tour experience	0.39	0.43	1.88	0.45	0.66
Everything else being equal I would choose an accredited operator over a non accredited operator	0.00	0.44	0.74	0.24	1.79
There is not enough information available to explain accreditation to the general public	0.08	1.07	1.21	0.30	0.38

*Significant at the $p < 0.05$ level

Simple factorial ANOVA's were again used to assess whether there were statistically significant demographic differences across high and low ratings of accreditation importance ratings. Demographic variables were used as independent variables and accreditation importance statements as the dependent variables. The accreditation importance statements were converted to dichotomous variables based on a median split. Table 20 summarises the results of this analysis listing the F-values.

Statistically significant differences exist in only one of the relationships with the demographic variables. This indicates that there was a significant demographic difference between respondents and their high or low rating of the accreditation importance variable – 'I would be prepared to pay more money for an accredited tour

experience' with regard to education. There were no statistically significant differences between respondents on any of the other importance variables tested.

Based on these results Hypotheses 3, 10, 12 and 14 could not be supported but there is evidence to support Hypothesis 13.

5.14 Predicting Accreditation Importance

HYPOTHESIS 14:

The items in the rating of accreditation attributes are able to predict the consumers rating of accreditation importance.

To compare the performance of accreditation attributes in predicting actual accreditation importance discriminant analysis was employed. In this analysis, the accreditation attribute variables listed in the questionnaire were used as the independent variables to predict actual ratings for accreditation importance also listed in the questionnaire. The accreditation importance items were used separately as the grouping variables.

The "grouped" case items identified for predicting accreditation importance included:

- Enables the customer to identify operators who are higher in quality and performance
- Makes sure that the operator or guide knows how to communicate with the consumer
- Ensures that adventure tour staff will perform professionally
- Ensures that the adventure tour is provided as described in advertising material
- Ensures that the staff will be friendly

- Makes sure that the customer is informed of all dangers before beginning the activity or tour

The output of the discriminant analysis is summarised in table 21.

Table 21: Summary of Discriminant Analysis

On groups defined by:	"Grouped" cases correctly classified:
Accreditation is one of the most important characteristics I look for when I choose an adventure tour experience	73%
Accreditation is important to the safety of consumers of adventure tour activities	81%
Accreditation should be obtained by all operators before they start up a tour business	65%
Everything else being equal I would choose an accredited operator over a non-accredited operator	78%

The per cent of "grouped" cases correctly classified for 'is the most important characteristic I look for in choosing an operator' increased to 81% if the following accreditation variables were added:

- Ensures that guides and leaders are appropriately qualified
- Is a waste of time

The percent of "grouped" cases correctly classified for accreditation 'should be obtained by all' increased to 76% if the following variables were added:

- Ensures that guides and leaders are appropriately qualified
- Increases the price of the adventure tour
- Is a waste of time

The percent of "grouped" cases correctly classified for 'accreditation is important to safety' increased to 81% if the following variables were added:

- Ensures that guides and leaders are appropriately qualified

- Ensures that the operator has planned for emergencies should they arise

Based on these improvements there is value in adding ‘ensures that guides and leaders are appropriately qualified’ and ‘is a waste of time’ to the grouped case items.

5.15 Summary of Research Hypotheses Results

HYPOTHESIS	SUPPORT
<u>HYPOTHESIS 1:</u> Consumers of adventure tourism products rate accreditation highly.	Yes
<u>HYPOTHESIS 2:</u> There is a positive relationship between the importance of accreditation and the demographics of the consumer	No
<u>HYPOTHESIS 3:</u> There is a difference with respect to demographics between those with high beliefs that accreditation is important to safety and those with low beliefs.	No
<u>HYPOTHESIS 4:</u> There is a positive relationship between consumer demographics and the degree of risk of the adventure tourism activity they select	Yes
<u>HYPOTHESIS 5:</u> There is a positive relationship between consumer demographics of and the size and category of operator they select	Yes
<u>HYPOTHESIS 6:</u> The demographic details of the consumers of adventure tourism products will vary in relation to age, gender, family, salary and education.	Yes
<u>HYPOTHESIS 7:</u> Consumers rate particular accreditation attributes more highly than others.	Yes
<u>HYPOTHESIS 8:</u> Accreditation attributes can be grouped into several key categories.	Yes
<u>HYPOTHESIS 9:</u> There is a positive relationship between the rating of key accreditation attributes and the demographics of the consumer.	Yes
<u>HYPOTHESIS 10:</u> There is a difference with respect to demographics between those with high beliefs that accreditation affects choice of an adventure tour experience and those with low beliefs.	No
<u>HYPOTHESIS 11:</u> There is a difference with respect to demographics between those with high beliefs that they would pay more for accreditation and those with low beliefs.	Yes
<u>HYPOTHESIS 12:</u> There is a difference with respect to demographics between those with high beliefs that accreditation should be compulsory and those with low beliefs.	No
<u>HYPOTHESIS 13:</u> There is a difference with respect to demographics between those with high beliefs that more information needs to be provided on accreditation and those with low beliefs.	No
<u>HYPOTHESIS 14:</u> The items in the rating of accreditation attributes are able to predict the consumers rating of accreditation importance.	Yes

CHAPTER 6

CONCLUSION

6.1 Key Findings

In Victoria in recent years we have seen a rapid growth of accreditation programs developed by tourism industry associations. The development of accreditation programs has generally been accepted by the industry as a means of managing quality practices. Despite this growth there has been relatively little research conducted in the area and particularly in relation to the consumer's view of the subject. The success of accreditation programs relies on the consumer and the effect it has on their choice of tourism products.

It was particularly important to research adventure tourism as its recent rapid expansion has seen the emergence of many small operators. Lack of regulation and management in this area means that unsuitable and inexperienced individuals may place consumers at risk.

6.1.1 Defining Accreditation

As the term accreditation is often misinterpreted a number of definitions were provided in chapter one in an attempt to clarify its meaning. The definition that seemed most adequate for this study and which reflects the programs currently in the industry defined accreditation as a non-mandatory program/process by which an association requires an individual or organisation to comply with a set of standards or competencies. Accreditation can be withdrawn for failing to satisfy these standards but it does not prevent the organisation or individual from conducting a lawful business.

A systematic literature review was conducted to identify the key characteristics of accreditation for adventure tour operators. Although this was a complex task due to the large number of adventure activities available it was considered important to have clearly defined categories in order to conduct effective research. The key categories identified for the accreditation of adventure tours were classified into two major areas - program attributes and importance attributes. These attributes are:

6.1.1.1 Program Attributes

- Quality Assurance
- Risk and Emergency Management
- Bookings/inquiries procedures
- Equipment maintenance
- Skills Qualifications
- Ongoing Professional development
- Environmental management
- Sustainability of the environment
- Code of ethics
- Experience & knowledge
- Legal requirements
- Marketing
- Location

6.1.1.2 Accreditation importance attributes

- Voluntary versus mandatory
- Price/value

- Choice influence
- Safety assurance
- Improves quality/professionalism

These program and importance attributes were the key attributes tested in the survey of consumers.

The primary research conducted in this study attempted to identify the attributes that consumers rated highly in relation to the accreditation of adventure tour operators and to their choice and needs as consumers. The most highly rated attributes, as identified by the consumers, are:

- Staff competence (training in technical skills; maintenance of equipment and transport)
- Safety (awareness of unsafe practices; training in first aid; appropriate qualifications; legal operation; meeting minimum standards; appropriately experienced; organisation and planning by guide/operator; planning for emergencies)
- Environmental protection

These attributes were identified using mean ratings and frequency distribution analysis of open-ended responses. There was a number of common elements in both analyses.

Underlying connections between accreditation attributes and accreditation importance attributes were explored using factor analysis. The groupings, based on consumer

perceptions, provide a basis for categorising accreditation. The categories derived from factor analysis are:

1. Customer Focus
2. Safety/Security
3. Reliability Assurance
4. Consumer Protection
5. Resource Conservation
6. Price/Cost
7. Environmental Protection
8. Marketing
9. Consumer Information

6.1.2 Demographics of Adventure Tour Consumers and the Ability of Individual Differences to Explain Accreditation

Chapter two discussed the importance of market segmentation and the need to understand consumers in relation to the choice of adventure tourism products and the possible influence of accreditation. There have been very few studies that have specifically focussed on the adventure tourism market segment.

As this study is an exploratory study only, demographics were used to define the market segment. It is understood that a more detailed market segmentation approach that includes values and psychographics should be included to fully describe this segment.

A categorical scale approach was used to obtain information from respondents on demographic details while a rating scale was used to measure accreditation attributes.

The two approaches enabled an assessment and comparison of individual differences in relation to accreditation rating.

A summary of the demographic findings indicated that the respondents to this survey who participated in a commercialised adventure tour activity were mainly: male, 25-34 years old, well educated and earn more than \$30,000 per year in income. The education and income demographic groupings are supported by Hvenegaard's (1996) study but his cross-section study included ecotourists which could explain the tendency for his participants to be in the older 40-50 age bracket.

6.1.2.1 Relationship With The Risk of The Activity

Consumers in this study who participated in high risk activities were below 44 years in age and were single/divorced or widowed. There were no significant differences between respondents who participated in high risk activities with regard to – gender, salary and education. Because of limited studies in this area it is difficult to make comparisons.

6.1.2.2 Relationship With Category and Size of Operator

Family was the only demographic variable that showed any statistically significant differences between respondents and their selection of operator type. Most married respondents tended to select small aqua and 4WD/bushwalk activities with single respondents selecting higher risk activities such as rock climbing and Perergrine white water rafting activities. The size of the operation did not seem to affect choice. These findings support the results of the demographic relationship with riskiness of activity.

6.1.2.3 Rating of Accreditation Importance

Consumers of adventure tourism products generally rate accreditation highly.

Consumers also indicated that they would choose an accredited adventure tour operator over a non accredited operator but it is not necessarily the most important influence in the choice process. Consumers are not sure about accreditation in relation to its cost and its assurance that it provides quality or value for money experiences. However there seems to be agreement that accreditation should be mandatory for adventure tours and that it is important to safety and professionalism.

6.1.2.4 Demographic Difference With Respect To Accreditation Importance and Accreditation Attribute Ratings

There were very few demographic differences across accreditation importance variables. However there were statistically significant differences between respondents and their rating of accreditation attributes with regard to education, salary and family. It could be suggested that income (which is determined by occupation) and education affect a consumers experience and degree of understanding of accreditation. Family differences in relation to the presence or absence of children could affect perceptions of the importance of accreditation if it is related to safety assurance.

There was a significant demographic difference between respondents and their high or low rating of the accreditation importance variable – ‘I would be prepared to pay more money for an accredited tour experience’ with regard to education. There were no statistically significant differences between respondents on any of the other importance variables which related to – making accreditation compulsory; the

importance of accreditation to safety; accreditation affecting the choice of an experience; and the need for more information on accreditation.

These findings have implications for the promotion of accreditation and the identification of markets to target. The promotion of accreditation should include the riskiness of the activity and the price of an accredited tour.

6.1.2.5 Rating of Accreditation Attributes

Consumers rated - training in technical skills, organisation and planning, and legal operation more highly than the other attributes listed. ATOA's accreditation program compares favourably with these results as a number of the higher rating attributes are included in their current program.

Based on the results of this study there is evidence to include 'safety' and 'environmental protection' as core competencies. Consumers rate the 'experience of the operator/guide' highly which suggests that this should also have a greater focus in the accreditation of adventure tour businesses.

The study also indicated that there were very few demographic differences across accreditation attribute ratings.

6.1.3 Predicting Accreditation Importance

Discriminant analysis was used to test the ability of the accreditation attributes to classify respondents on whether the rated accreditation importance highly. The

analysis provided several "grouped" case items that predicted accreditation importance. These items included:

- Enables the customer to identify operators who are higher in quality and performance
- Makes sure that the operator or guide knows how to communicate with the consumer
- Ensures that adventure tour staff will perform professionally
- Ensures that the adventure tour is provided as described in advertising material
- Ensures that the staff will be friendly
- Makes sure that the customer is informed of all dangers before beginning the activity or tour

The importance statement relating to making accreditation compulsory was the least successfully predicted with only 64 per cent correctly classified. The more successfully predicted statements with approximately 80 per cent correct classification were related to 'accreditation and its importance to safety' and 'choosing an accredited operator over a none accredited operator'.

If other accreditation variables relating to 'waste of time' and 'ensuring appropriate qualifications' were added for three out of the four separate accreditation importance statements the per cent of "grouped" cases correctly classified increased.

The identified 'grouped' case items could be important for future accreditation research studies.

6.2 Summary

The accreditation of adventure tourism operators, a rapidly expanding sector of the tourism industry, is currently an important focus of a number of key associations. An understanding of accreditation and its importance to and influence on consumer choice is critical for the acceptance and future development of accreditation programs. The intention of this thesis has been to add to the body of knowledge in this area.

This study is an exploratory study as the sample used to collect data was a relatively small sized stratified sample. Therefore the findings of this research cannot be generalised beyond this study.

However the identification of key accreditation attributes has been a key component of this study and provide a basis for future research projects. The analysis of the consumer's perception of these attributes also assists in the development and promotion of accreditation in a way that is relevant to consumers.

The demographic differences identified in this study could also provide additional information on the market segment for adventure tourism. The influence of these differences on accreditation ratings could be of value to those organisations developing accreditation programs for this sector.

6.3 Recommendations

As a result of the findings of this study a number of recommendations have been made:

- Evidence that participants in commercialised adventure tour activities are mainly male, 25-34 years old, well-educated and earn more than \$30,000 a year needs to be explored further with research that clearly identifies target markets for various adventure activities.
- Responses from participants indicate that they are not fully informed about accreditation and how it affects an adventure tour operation. This suggests that more information needs to be provided to the public on the accreditation of adventure tours. Evidence from this study also indicates that education background, marital status and occupation influences how consumers perceive accreditation which has implications for the way in which accreditation should be marketed.
- Operators in the business of adventure tourism should market the accreditation of their product to their specific market segment with an emphasis on the safety of consumers and the protection of the environment.
- The consumer's high rating of accreditation and their preference for an accredited operator over a non-accredited operator suggests that it is important to present the accreditation of a tour product early in the choice process. The marketing of accreditation via brochures, travel agents and industry associations is an important consideration.
- When reviewing accreditation programs for adventure tour operators associations could consider the following:
 - The recognition of the experience of the operator as a key component of

- accreditation. The importance of *staff competence* (training in technical skills; maintenance of equipment and transport); *safety* (awareness of unsafe practices; training in first aid; appropriate qualifications; legal operation; meeting minimum standards; appropriately experienced; organisation and planning by guide/operator; planning for emergencies); and *environmental protection* as key accreditation attributes.
- The major categories within an accreditation program to include: a customer focus; safety/security; reliability assurance; consumer protection; resource conservation; price/cost; environmental protection; marketing; and consumer information.
- The provision of training to ensure the ongoing development of technical skills, organisation and planning and the legal operation of businesses.
- The importance of accreditation to consumers should be considered by industry associations in their strategic planning for industry development and lobbying of government.
- If further research is conducted in this area the results of the discriminant analysis conducted in this study could be used as a more efficient and effective means of testing accreditation importance attributes.

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APPENDIX 1.0

Questionnaire

Accreditation (also known as certification, approval or endorsement), is the assessment of a business to ensure that it meets set standards. The accreditation of adventure tour operators has been introduced by the industry in an attempt to provide consumers with the best possible experience.

The following list contains characteristics that some people could associate with the accreditation of adventure tour businesses. On a scale of 1 to 7, please circle the number which best describes your opinion, where 1 represents strongly disagree, and 7 represents strongly agree.

Accreditation of Adventure Tour Operators:	Strongly Disagree						Strongly Agree
1. ensures that adventure tour staff will perform professionally.	1	2	3	4	5	6	7
2. ensures that the staff will be trained in technical skills.	1	2	3	4	5	6	7
3. reduces the risk of injury to customers using adventure tour activities.	1	2	3	4	5	6	7
4. ensures a refund of money will be provided if difficulties arise.	1	2	3	4	5	6	7
5. ensures that the operator carries insurance which protects the consumer.	1	2	3	4	5	6	7
6. ensures that transport and equipment are well maintained.	1	2	3	4	5	6	7
7. ensures that animals used for transportation are cared for.	1	2	3	4	5	6	7
8. encourages me to believe that the adventure tour operator or guide will be organised and will have planned the tour well.	1	2	3	4	5	6	7
9. helps the operator ensure that damage to the environment will be minimised.	1	2	3	4	5	6	7
10. gives me confidence that the environment will be protected by the tour operator so that it will be preserved for future use.	1	2	3	4	5	6	7
11. ensures that the experience is appropriately priced.	1	2	3	4	5	6	7
12. encourages me to believe that the operator will be ethical in the conduct of business.	1	2	3	4	5	6	7
13. ensures that the customer will have an enjoyable time.	1	2	3	4	5	6	7
14. guides the customer in the selection of an adventure tourism experience.	1	2	3	4	5	6	7
15. ensures that customers receive a personalised service.	1	2	3	4	5	6	7
16. is a waste of time.	1	2	3	4	5	6	7
17. ensures that the operator will act upon customer complaints.	1	2	3	4	5	6	7
18. ensures that staff are highly skilled experts.	1	2	3	4	5	6	7
19. increases the price of the adventure tour.	1	2	3	4	5	6	7

Strongly
Disagree

Strongly
Agree

Accreditation of Adventure Tour Operators:

20. ensures that customers will be given information on how to care for the environment.	1	2	3	4	5	6	7
21. is not related to conservation of the environment.	1	2	3	4	5	6	7
22. ensures that the operator will be honest and fair.	1	2	3	4	5	6	7
23. assists the operator or guide in knowing how to work with people.	1	2	3	4	5	6	7
24. ensures that the operator be trained in first aid.	1	2	3	4	5	6	7
25. guarantees that the customer will have a quality experience.	1	2	3	4	5	6	7
26. ensures that the operator is operating legally.	1	2	3	4	5	6	7
27. ensures that the operator or guide is aware of unsafe practices.	1	2	3	4	5	6	7
28. ensures that the operator has planned for emergencies should they arise.	1	2	3	4	5	6	7
29. is an unnecessary bureaucracy.	1	2	3	4	5	6	7
30. makes sure that the operator or guide knows how to communicate with the consumer.	1	2	3	4	5	6	7
31. ensures that the quality of the transport used is appropriate for the environment or experience.	1	2	3	4	5	6	7
32. ensures customer satisfaction.	1	2	3	4	5	6	7
33. helps the operator to know the type of customer their business attracts.	1	2	3	4	5	6	7
34. ensures advertising is accurate and up to date.	1	2	3	4	5	6	7
35. makes sure that adventure tour operators are continually looking for ways to improve.	1	2	3	4	5	6	7
36. enables the customer to identify operators who are higher in quality and performance.	1	2	3	4	5	6	7
37. ensures that the adventure tour is provided as described in advertising material.	1	2	3	4	5	6	7
38. ensures that the staff will be friendly.	1	2	3	4	5	6	7
39. makes sure that the customer is informed of all dangers before beginning the activity or tour.	1	2	3	4	5	6	7
40. ensures that the staff will be appropriately experienced.	1	2	3	4	5	6	7

Accreditation of Adventure Tour Operators:	Strongly Disagree							Strongly Agree		
41. ensures that the operator or guide meets minimum standards.	1	2	3	4	5	6	7			
42. ensures that guides and leaders are appropriately qualified.	1	2	3	4	5	6	7			
43. is a marketing tool for the operator.	1	2	3	4	5	6	7			

How important is accreditation?	Strongly Disagree							Strongly Agree		
44. Everything else being equal I would choose an accredited operator over a non-accredited operator.	1	2	3	4	5	6	7			
45. All adventure tour operators should be accredited.	1	2	3	4	5	6	7			
46. Accreditation is important to the safety of consumers of adventure tour activities.	1	2	3	4	5	6	7			
47. Accreditation ensures that only professional operators can operate an adventure tour business.	1	2	3	4	5	6	7			
48. Accreditation is one the most important characteristics I look for when I choose an adventure tour experience.	1	2	3	4	5	6	7			
49. There is not enough information available to explain accreditation to the general public.	1	2	3	4	5	6	7			
50. An accredited adventure tour experience is more expensive than a non-accredited adventure tour	1	2	3	4	5	6	7			
51. An accredited operator provides quality , “value for money” experiences.	1	2	3	4	5	6	7			
52. I would be prepared to pay more money for an accredited tour experience than a non-accredited experience.	1	2	3	4	5	6	7			
53. Accreditation should be obtained by all operators before they can start up a tour business.	1	2	3	4	5	6	7			

54. **What *other* characteristics should be considered for the accreditation of adventure tour operators?**
Please write your response below

55. **List one or two items that are the most important attributes of accreditation.**

BACKGROUND DATA

In the following questions, please circle the number corresponding to your answer.

1. The adventure activity you participated in today:

Rock climbing	Rafting	Horse Riding	Bushwalking
Camping	Fishing	4 Wheel Driving	Scuba Diving
Cycling	Canoeing	Boating	Other _____

2. Gender

Male.....1
 Female.....2

3. Age Group

18 - 24.....1
 25 - 34.....2
 35 - 44.....3
 45 - 54.....4
 55 - 64.....5
 65 and above.....6

4. Highest Education Level Achieved

Primary.....1
 Some secondary school.....2
 Completed secondary school (Year 12 or its equivalent).....3
 Some technical/ commercial/ trade certificate/ apprenticeship.....4
 Completed university or other tertiary degree or diploma.....5
 Postgraduate qualification.....6

5. Family Status

Married (or De facto), children.....1
 Married (or De facto), no children.....2
 Single.....3
 Widowed/divorced.....4

6. What is your annual salary?

Less than \$9,999.....1
 \$10,000 - \$19,999.....2
 \$20,000 - \$29,999.....3
 \$30,000 - \$39,999.....4
 \$40,000 - \$49,999.....5
 \$50,000 or more.....6

7. What is the postcode of your current home address?

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**Thank you for completing this questionnaire.
 We appreciate your time and effort.**

