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THEORETICAL ARTICLE

Understanding and Responding to the Complaining Behaviors of Restaurant Customers from Collectivist Cultures

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Abstract

This paper aims to examine how frontline employees in individualistic cultures such as the United States can better understand and respond to the complaining behaviors of restaurant consumers from collective cultures such as those from Asian countries. Previous studies suggest that customers from collectivist cultures often prefer not to complain directly and openly about service failures. They may offer indirect hints and information to their families and friends about their experiences. It is possible that frontline employees from individualistic cultures may not fully understand the complaining behaviors of restaurant customers from collectivist cultures. This may result in loss of business, customers' disloyalty and negative publicity about the business. Based on a review of previous research studies in this area, this study offers specific recommendations for practice and future research.

Keywords

Culture • Service recovery • Service failure • Customer complaints • Frontline employees • Collectivist cultures

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Introduction

Food service and hospitality businesses greatly focus on customer satisfaction as it relates to service quality and growth of revenues (Lee & How, 2018; Park, Kim, & O'Neill, 2014). Understanding the complaining behaviors of customers and satisfying and meeting their expectations is essential for the survival and success of food service businesses. High quality service - such as creating a great lasting impression or guest engagement - is crucial in achieving customer satisfaction in order to gain repeat business and referrals (Kandampully, Zhang, & Jaakkola, 2018; Othman, Zahari, & Radzi, 2013). However, mistakes and service failures often happen in many food service and lodging businesses (Qiu, Li, Mattila, & Yang, 2018). It is the responsibility of these companies to respond to such service failures and overcome them to satisfy customers (Koc, 2018). In addition, even if there is no service failure, service quality may vary by employee according to the service delivery process and service expectations.

Service expectations may differ depending on each person's personality, education, income and national culture. In particular, customers from different countries and cultures may have varying degrees of service delivery expectations (Donthu & Yoo, 1998; Liu & McClure, 2001), partly because their national cultures can influence their behaviors, attitudes and expectations. For example, the increasing number of Chinese tourists traveling abroad expect a standard set of amenities (e.g. hot water and single-use toiletries) for a good value, as well as an understanding of and respect for their wants and needs (Li, Lai, Harrill, Kline, & Wang, 2011). In addition to these expectations, their complaining behavior may vary according to their culture (Ergun & Kitapci, 2018; Ngai, Heung, Wong, & Chan, 2007). Therefore, frontline employees and managers in food service businesses need to understand and respond to their complaining behaviors with appropriate strategies. Moreover, service providers should be trained in understanding and responding to complaints by customers from different cultures.

Previous studies have mainly taken place in North America and Europe, focusing on local customers. However, in recent years, due to the growth of international tourism, more tourists from Asian countries, including China, India, Japan and Korea, are participating in overseas travel. Consequently, frontline employees of food service businesses in Europe and North America need to better prepare and train their employees on how to best serve customers coming from Asia. This will in turn help employees better understand the attitudes and behaviors of Asian customers, including their complaining behaviors (Donthu & Yoo, 1998; Prayag, Cohen, & Yan, 2015).

Following Hofstede's (1980) cross-cultural dimensions, customers from collectivist cultures prefer not to complain about service failures directly. In addition,

frontline employees and managers of food service businesses from individualistic cultures may not easily understand the indirect complaining behaviors or gestures of customers from collectivist cultures. Although this is an important area of study, there has been limited research looking into the complaints of restaurant customers from different cultures and how food service companies and frontline employees can better handle such complaining behaviors and overcome a potentially negative situation. Given this, this article aims to examine how frontline restaurant employees in an individualist culture can better understand and respond to the complaining behaviors of consumers from collectivist cultures such as those from Asian countries and offer service recovery strategies.

This study was developed based on a critical review of previous research in this area. A systematic review of relevant previous studies was undertaken and emerging themes were identified and discussed. The next two sections offer discussions on measuring service quality, service failure and complaining behaviors. In the fourth section, service recovery issues are reviewed and evaluated. In the fifth section, cross-cultural differences in guests' complaining behavior and service recovery strategies are discussed. The following section discusses how to respond to the complaining behaviors of restaurant guests from different cultures. Finally, the study offers specific conclusions, practical implications and recommendations for future research.

Measuring Service Quality

Service quality shows the difference between perceived service performance and expected level of service (Donthu & Yoo, 1998). According to Zeithaml, Berry, and Parasuraman (1993, p. 2), service expectations refer to "beliefs about service delivery that function as standards or reference points against which performance is judged." In simple terms, quality of service is high when the performance is greater than service expectations, meaning service quality is crucial for all organizations including food service businesses. Therefore, customers' needs and expectations should be met and exceeded when delivering services and products.

Previous studies have aimed to measure service quality in the services field (Bitner, 1990; Parasuraman, Berry, & Zeithaml, 1991) and the hospitality field (Amin, Yahya, Ismayatim, Nasharuddin & Kassim, 2013; Lai, Hitchcok, Yang, & Lu, 2018; Oh, 1999; Oh & Kim, 1996; Oh & Parks, 1996). For example, Parasuraman, Berry, and Zeithaml (1991) proposed the SERVQUAL model, which has been widely used to measure service quality. SERVQUAL has five dimensions: reliability, assurance, responsiveness, empathy and tangibles (Akbaba, 2006; Parasuraman, Berry, & Zeithaml, 1993; Roy, Lassar, Ganguli, Nguyen & Yu, 2015; Leisen Pollack, 2009). It

is stated that a pleasant service environment positively influences guests' expectations and satisfaction (Kandampully, Juwaheer, & Hu, 2011; Rauch, Collins, Nale, & Barr, 2015).

For the lodging industry, previous studies proposed different models. For example, LODGQUAL and the Lodging Quality Index (LQI) were proposed by previous studies based on the SERVQUAL model (Amin et al., 2013; Deng, Yeh, & Sung, 2013; Getty & Thompson, 1994; Getty & Getty, 2003; Kandampully & Suhartanto, 2000; Knutson et al., 1990; Ladhari, 2009; Mei, Dean, and White, 1999; Salazar, Costa, & Rita, 2010; Wilkins, Merrilees, & Herington, 2007). Mok and Armstrong (1998) stated that while expectations in service quality can differ in different cultures, the reliability dimension of service quality is equally expected.

For the food service industry, DINESERV was proposed as a reliable instrument to determine consumers' views on service quality (Kim, Ng, & Kim, 2009; Stevens, Knutson. & Patton, 1995; Markovic, Komsic, & Stifanic, 2013). Using this instrument, validation of the dimensions of DINESERV has been evaluated in different countries such as Korea (Kim, McCahon & Miller, 2003), Croatia (Marković, Raspor & Šegarić, 2010), Malaysia (Bougoure & Neu, 2010), Jordan (Ala'a, Ahmad, & Ahmad, 2015) Sudan (Diab, Mohammed, Mansour, & Saad, 2015) and some western countries and cities such as London (Mhlanga, Hattingh, & Moolman, 2014), England (Truong, Nisar, Knox, & Prabhakar, 2017), Turkey (Murat & Memis, 2017) and in the capital cities of Europe (Radojevic, Stanisic, Stanic, & Sarac, 2014). Overall, the research findings from these studies indicate that DINESERV is a valid tool in different cultures, and the quality of service may differ considerably according to guests' and food service outlets' characteristics. Hansen (2014) combined SERVQUAL and DINESERV and proposed a tool to measure meal experiences. Hospitality businesses need to analyze their services and ensure they exceed their customers' expectations in all these dimensions (Zeithaml et al., 1993). They should map out their service delivery process and identify potential gaps and eliminate them to deliver high service quality. However, even after measures are taken to deliver high service quality, customers may still complain (Hartini & Avenina, 2013; Huang & Miao, 2016). The next section will discuss this in some depth.

Service Failures and Complaining Behaviors

Errors and failures often happen in the process of service delivery due to interactions between employees and guests, this is in addition to problems with the physical aspects of the service design (Kim, Lee, & Mattila, 2014; Koc, 2018). It is possible that there may be a misunderstanding between what an organization officially promises to deliver and what the guests expect to receive. Regardless of the

reason why customers complain, Guest dissatisfaction with service quality may harm a hospitality company's reputation. This may result in customer disloyalty, leading to a decline in repeat business and sales. Customers do not often complain, especially if they think their complaining will not do any good. Even when customers show dissatisfaction, managers and frontline employees may not hear such complaints or might choose to ignore them (Wisdomjobs, 2018). However, customer complaints offer insights into the problems that they are experiencing, helping the company identify areas for improvement.

Customers' complaints can be grouped into three categories: contacting the provider directly, telling colleagues and family members about the experience, and contacting an agency or pursuing legal action (Hartini & Avenina, 2013; Park, Kim, & O'Neil, 2014; Sing 1988). When businesses fail to identify and handle customers' complaints properly, the outcomes can have major negative impacts on the business's performance. However, customer complaints can offer opportunities to readdress service failure incidents to improve service quality and improve customer loyalty (Kim et al., 2014). In short, customers' complaints can provide important opportunities for businesses to fix their problems and improve their service delivery process, which can result in improved business performance (Aguilar-Rojas, Fandos-Herrera, & Flavián-Blanco, 2015).

Previous studies found that e-word of mouth (eWOM) intentions of customers are high regarding service failure and complaining behaviors about restaurants. Customers' negative eWOM becomes more aggressive as the service failure escalates (Israeli, Lee, & Karpinski, 2017). High levels of unfairness, locus, personal identity and firm responses influence customers' complaints towards a service provider (Balaji, Jha, & Royne, 2015; Mattila & Patterson, 2004). Cultural backgrounds of customers influence their expectations, satisfaction, and evaluations (Ayoun & Moreo, 2008). For example, Chen and Chang (2011) found that customers from North America and China complain about similar issues but their responses differ in the linguistic forms and content. In other words, customers from North America tend to voice complaints about service failures in front of their family and friends more often than customers from Eastern countries such as China (Fan, Mattila, & Zhao, 2015; Zhang, Beatty, & Walsh, 2008). It is also important to note that there may be differences in complaining behaviors of guests from different collectivist cultures. For example, Jahandideh, Golmohammadi, Meng, O'Gorman and Taheri (2014) compared Arab and Chinese guests and found that Arab guests tend to share their negative experiences at a hotel with their friends and relatives while Chinese guests tend not to share their negative experiences. Moreover, Jahandideh et al. (2014) found that Arab guests prefer to be more vocal and talk to the manager while Chinese guests prefer to complain formally.

Service Recovery

Service recovery refers to businesses' efforts and strategies to correct errors and failures in the service delivery process that can result in customer dissatisfaction (Johnston, 1995; Lu, Gursoy, & Chi, 2018). Kanousi (2005) referred to service recovery as a service provider's efforts to eliminate and overcome the undesirable impact of a service failure. Relevant and effective recovery strategies can satisfy customers and sustain a healthy relationship with them (Sparks & McColl-Kennedy, 2001). Previous studies have looked at customer complaints and the service delivery process in service businesses and suggested that if customers complain, this is an opportunity for a service business to correct and improve the service delivery process. At this stage, customers can reevaluate the situation based on the service provider's service recovery actions. If they do not feel that the business's actions are satisfactory, customers may never come back to that organization (Mattila & Patterson, 2004; Yavas et al., 2003).

Many customers may prefer not to complain openly but instead share their dissatisfaction with their friends, colleagues and relatives. For example, Broadbridge and Marshall (1995) suggested three options in customer complaining behavior. First, they may decide not to do anything. Second, they may take private action by changing to another brand and becoming disloyal to the original company. Third, they may take public action by seeking direct compensation from the company, following legal action and sharing the situation on social media platforms. Given this, it is better for food service and hospitality businesses to ask their customers directly and frequently during the service delivery process whether the customers have any comments and feedback. Park et al. (2014) state that successful service recovery strategies can positively influence dissatisfied customers' overall feelings and make them satisfied, which can result in customer retention, loyalty and positive publicity.

The justice theory is useful in analyzing the effectiveness of service recovery strategies (Mattila & Patterson, 2004; Park et al., 2104; Tax & Brown, 2000). This theory has three dimensions: interactional justice, procedural justice and distributive justice (Park et al., 2104). Boshoff (1999) and Kanousi (2005) proposed a service recovery instrument called RECOVSAT, which has six dimensions: tangibles, empowerment, explanation, atonement, communication and feedback. Previous studies found a positive relationship between customer satisfaction and the employees' responses to mediate the service failure (Mohr & Bitner, 1995). Employees' interpersonal behavior, interpersonal skills, courtesy, respect, and honesty towards customers can recover a service failure and make dissatisfied customers happy (Goodwin & Ross, 1992; Park et al., 2013). There are four steps to service recovery: a real apology, reviewing what went wrong with the customer's experience and how it can be fixed, fix the issue within 2 minutes, and document the problem in detail (Solomon, 2014). It is evident that frontline employees' understanding and ability to respond

to customers' complaining behavior is crucial. However, if a restaurant customer is from a different culture than the frontline employee, the employee may not be able to fully understand the complaining behavior due to cross-cultural differences. The next section will focus on this issue.

Cross-Cultural Differences in Guests' Complaining Behaviors and Service Recovery in Restaurants

Culture is defined as "the collective programming of the mind which distinguishes the members of one group or category of people from those of another" (Hofstede, 1991, p. 5). National culture is a complex concept and there is no single guide to evaluate culture (Hofstede, 1994). Based on an extensive study with 72,215 employees working for IBM, Hofstede (1980) proposed five cultural dimensions: power distance, uncertainty avoidance, individualism versus collectivism, masculinity and time orientation. Power distance refers to the extent to which the low-ranking employees accept an unequal distribution of power. Uncertainty avoidance refers to the level which the members of a culture feel threatened by unknown and risky situations. People from such cultures tend not to feel comfortable with uncertain circumstances and they have a strong need to control situations.

Individuals in collectivist societies from birth are integrated and taught to help and support close relatives and friends; they typically prefer harmony and peace and may sacrifice their own benefits for their family or group. Regarding masculinity, masculine societies prefer assertiveness, strength, dominance, and egotism. Finally, time orientation is looked at along short-term and long-term dimensions. A short-term orientation with a focus on the present is more common in Western culture, while long-term orientation tends to reflect Eastern cultures that look toward the future (Hofstede, 1980). In cultures with a high power distance, customers often expect service providers to be more respectful and treat customers nicely (Furrer, Liu, & Sudarshan, 2000) and deliver quality service, as service employees' status is typically perceived as low (Mattila, 1999).

According to Furrer et al. (2000), in collectivist cultures like China, customers tend to be cooperative and not egocentric. Due to their compassion for others, they may be more tolerant if the service is not very efficient and they may not raise concerns openly and directly. In individualistic cultures such as the United States, customers expect fast service that is delivered correctly and at a high level of quality the first time. In high masculinity cultures customers often expect a male worker to be more skilled, reliable, and responsive than a female worker, and in long-term orientation cultures, customers expect to form long-term partnerships with businesses and service providers (Furrer et al. 2000).

Culture is a key factor that influences guests' service quality perceptions and their reactions to service failure (Wan, 2013). Previous research has found that complaining behavior of guests differs across individualistic and collectivist cultures (Chan & Wan, 2008). In reference to cross-cultural differences and service quality expectations, Donthu and Yoo (1998) found that guests from high power distance cultures have lower service quality anticipations and lower expectations of responsiveness from hospitality providers. These authors further noted that customers from high uncertainty avoidance cultures put more importance on tangibles, and customers from individualistic cultures have higher service quality expectations. Customers from individualistic cultures also expect a higher level of empathy and assurance from employees than do collectivist customers. Customers from long-term oriented cultures may have lower expectations of service quality than customers from short-term oriented cultures. Finally, responsiveness may be less important for customers from long-term oriented cultures (Donthu & Yoo, 1998).

Customers from collectivist cultures may evade direct conflict and opt for more non-confrontational complaining actions (Le Clarie, 1993). Customers from collectivist cultures believe that face-to-face dispute often results in losing face and damaging harmony (Hwang, Francesco, & Kessler, 2003). In a relatively recent study in this field, Park et al. (2014) found important variances in complaining behaviors between South Koreans and Americans. These authors concluded that individualistic and collectivist cultures demonstrate dissimilar actions in complaining behavior and service recovery efforts, and found complaining behavior in various cultures can be explained by service recovery expectations. Wong (2004) found that compensation can improve customers' assessment of the service encounter. An apology was also found to improve satisfaction in Singapore and Australia (Wong, 2004). According to Au, Buhalis, and Law (2014), familiarity with the local environment and culture helps customers better understand the failure. However, these authors state that managers should understand that even if Chinese customers do not openly complain, this does not guarantee they are satisfied. Moreover, Wan (2013) notes that the complaining behaviors of customers from collectivist cultures depends on the degree of embarrassment and losing face in a service failure situation.

Responding to Complaining Behavior of Restaurant Guests from Different Cultures

Customers of food service businesses from collectivist cultures visiting an individualistic culture may not directly and openly complain when they experience service failure, as they do not want to lose face and break harmony (Leung, 1987). As a result, when complaints of customers from collectivist cultures are observed and handled, food service businesses need to develop strategies that may allow

and encourage these consumers from collectivist cultures to share their complaints directly and openly (Park et al., 2014). When customers share their complaints, food service businesses should respond to such complaints quickly.

Employees and managers in food service organizations should offer timely service recovery efforts with fair strategies to elucidate a solution (Park et al., 2014; Yuksel, Kilinc, & Yuksel, 2006). If and when guests from collectivistic cultures raise a service failure openly to frontline employees and managers, the food service businesses should offer reimbursement and fast and fair solutions to handle the problem. Frontline employees and supervisors in food service and hospitality businesses in individualistic cultures serving customers from collectivist cultures should be trained to demonstrate effective interpersonal skills so they can provide genuine efforts to overcome such complaining actions (Ergün & Kitapci, 2018; Park et al, 2014).

The RECOVSTAT framework developed by Kanousi (2005) describes employee empowerment as particularly important when dealing with complaining customers from countries with high individualism, as these individuals do not like to be passed along to another employee or a manager. On the other hand, when addressing the concerns of customers with lower individualism and higher long-term orientation, it is more productive to emphasize explanations and tangibles (Kanousi, 2005). For example, appearances of frontline employees and workplace should be tidy and professional, and employees should take care to offer a satisfactory explanation and apology for the service failure. Patterson, Cowley, and Prasongsukarn (2006) found additional support for the importance of recognizing an individual's level of individualism/collectivism when addressing a service failure, and also pinpointed power distance and uncertainty avoidance (Hofstede, 1980) as essential dimensions to understand. For example, consumers with a higher level of power distance orientation prefer an apology from an employee with higher status within the organization, and those with higher uncertainty avoidance prefer to be kept informed of the progress toward resolving the failure.

The above discussions suggest that the service recovery process is crucial in responding to the complaining behaviors of restaurant customers. In the process of service recovery, some frontline restaurant employees and supervisors may handle customers' complaints even when they are not responsible for the service failure and errors. Customers may see these employees and managers as the agents of the food service company and evaluate their performance in the service recovery process (Liao, 2007). It is therefore important to offer specific training programs for frontline employees working in food service and hospitality businesses in individualistic cultures about the direct and indirect complaining behaviors of customers from collectivist cultures. Such training programs should cover possible service recovery

strategies for customers from specific cultures. If customers from collectivist cultures choose to share their opinions through social media, hospitality companies should also focus on how to respond to such comments and also prevent similar service failures in the future. In addition to monitoring social media, technology solutions such as customer relationship management (CRM) systems are effective in identifying and flagging individual customer issues to avoid service failure repeats. Although culture is not synonymous with nation of origin (Patterson, Cowley, & Prasongsukarn, 2006), simply being aware of a traveler's home country may offer a base insight on how to interact with that customer.

Discussion, Conclusions and Suggestions for Future Research

The aim of this review article was to examine how frontline employees in individualistic cultures such as the United States can better understand and respond to the complaining behaviors of restaurant consumers from collectivist cultures such as those from Asian countries. One may argue that due to globalization, cultural differences are slowly fading away and interactions between cultures may lead to similar behavioral and attitudinal patterns. Although customers from all countries share a basic need for clear communication and a goal of recovering satisfactorily from a service failure (Kanousi, 2005), it is clear that culture has an effect on how the process should best be handled. This review article has discussed how frontline food service employees in individualistic cultures such as the United States can better understand and respond to complaining behavior of consumers from collectivist cultures such as China, Korea and Japan. Previous studies suggested that customers from such cultures often prefer not to complain directly and openly about service failures. They may offer indirect hints or complain to their friends and relatives. It is possible that employees from individualistic cultures may not fully understand these complaining behaviors of customers from collectivist cultures. This may result in loss of business, customers' disloyalty and negative publicity about the business.

Based on the above analysis, the following conclusions and propositions are hereby proposed. First, culture has an impact on service delivery expectations, guest complaining behaviors and service recovery expectations. Second, there are differences in complaining behaviors between customers from collectivist cultures and customers from individualistic cultures. Customers from masculine cultures may openly express their concerns about service failures. Customers from collectivist cultures may be less likely to complain openly and directly to the service providers compared to customers from individualistic cultures. In addition, there may also be differences among customers' complaining behaviors and expectations coming from collectivist cultures. Customers from collectivist cultures tend to express their service quality expectations less than customers from individualistic cultures. Customers

from long-term oriented cultures express lower service quality expectations than customers from short-term oriented cultures. Forth, frontline food service employees from individualistic cultures can better understand complaints from customers from similar individualistic cultures, whereas the same frontline employees can face difficulties in fully understanding direct complaints from customers from collectivist cultures. Therefore, frontline food service employees and managers from individualistic cultures need to be trained in understanding complaints from customers from specific collectivist cultures. Fifth, food service businesses can review and discuss specific cases of previous service failures and their service recovery efforts with their frontline employees and managers. In addition, such service failures and service recovery strategies can be shared with frontline employees and managers via food service companies' training platforms. In addition, during training sessions, scenarios of service failures and recovery strategies can be utilized. Finally, given the importance of social media, food service businesses should review social media posts on leading social media platforms both in the United States and also in those collectivist cultures/countries regarding their businesses and respond to them in a timely manner, not only in English but also in those languages, e.g. Chinese.

This study was developed based on a critical literature review. The theoretical discussions provided in this study are not based on empirical findings. It is therefore suggested that future research in this area might offer useful empirical findings on service delivery expectations, complaining behaviors and service recovery efforts for customers from collectivist cultures. Future studies might also provide empirical findings on whether and how frontline employees, especially in the food service business, can understand and handle customers' expectations and complaints. These studies could explore using technology such as CRM systems and social media to prevent and recover from service failures, and possibly identify contextual signals such as body language or key words that may indicate displeasure with the service. Based on these clues, employees could be trained to ask questions designed to identify factors such as the customer's level of individualism/collectivism, power distance, and uncertainty avoidance to provide a tentative path forward. As China, Korea, Japan and Brazil are becoming main tourist markets for the United States, the study findings will be important to offer better service recovery strategies for customers from these countries.

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THEORETICAL ARTICLE

Bibliometric Profile of Studies Related with Equity Theory

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Abstract

This study aims to present a general framework about studies on equity theory. For this purpose, articles related with equity theory were examined in terms of various bibliometric characteristics. Word "equity" and "equity theory" were searched among the articles published in the Journal of Retailing and Consumer Services between 2014 and 2018. 31 articles were identified related to equity theory and then were examined in terms of year of publication, number of authors, number of pages, keywords, number of references, research topic, type of research, data collection tool, sample group and sampling method. According to the results of the study, the number of articles related with the theory increased from 2014 to 2018. The number of articles related to this theory was the highest in 2018. It was seen that most of the articles containing the theory examined price, perception of justice, service failures, and compensation for service failures.

Keywords

Equity • Equity theory • Bibliometrics • Bibliometric analysis • Marketing

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Introduction

In order to maintain their activities, businesses need to satisfy their customers and even their employees. It can be said that the satisfied customer will have positive behavioral intentions and with satisfied employees their loyalty to the business will increase. Customer's or employee's perception of equity is among the factors affecting satisfaction. Therefore, it is possible to say that equity theory related to the perception of equity is important in terms of predicting the behavior of individuals. Equity theory is a concept related to the perception of equity that an individual has as a result of comparing the inputs and outcomes with the input and outcome of the referent. The perception of inequity occurs when ratio of outcomes to inputs obtained by the individual is different from the ratio of the referent to which it compares. The individual may exhibit many different behaviors in this case of inequity. For this reason, it is important to know which factors affect the perception of equity of individuals and to determine the relationship between perception of equity and satisfaction and similar variables.

From the first study on equity theory, many studies have been conducted in different fields related to the subject. In this study, bibliometric profiling of studies on equity theory is the aim. In this context, the equity theory is explained first. After that, articles dealing with equity theory published between 2014-2018 in the Journal of Retailing and Consumer Services were examined according to various bibliometric characteristics. Studies involving equity theory were examined in terms of factors such as subject, method, keywords, etc. Briefly, in this study, a general framework about the studies related to equity theory is presented.

Conceptual Framework

It is necessary to ensure customer satisfaction in order for business to maintain their presence. Swan and Oliver (1991: 15) states that customer satisfaction is accepted as the keystone of marketing strategies, as the satisfied customer will be more likely to buy again and that customer's perception of equity will affect satisfaction. Perceived equity; it is defined as a psychological reaction to the value that a service company provides (Olsen & Johnson, 2003: 184). The theory of equity, which was based on the concept of equity evaluated by comparing the outcomes of individuals with inputs to determine whether a fair outcome was obtained in return for the efforts or resources allocated, was introduced by Adams in 1963 (Joshi, 1990: 788).

Equity theory includes four different elements: input, outcome, choice of a referent and an individual's motivation to reduce inequity (Fadil, Williams, Limpaphayom, & Smatt, 2005: 19). Inputs are contributions of participants to exchange while outcomes are treated as positive or negative consequences (Walster, Berscheid, & Walster,

1976: 3). While money, time, effort, or opportunity cost counted as inputs, provided tangible and intangible benefits are considered as outcomes (Lacey & Sneath, 2006: 459). According to Adams (1963: 424) that referent to which the person compares his own inputs and outcomes may be another person, the person himself or a group. A person perceives equity or inequity as a result of his comparison with referent. In the event of inequity being perceived, dissonance, guilt, and anger are formed and these negative situations are overcome as a result of various activities carried out by the individual to achieve equity (Alexander, 2002: 226).

In case of exchange between two individuals, Adams (1963: 422-426) stated that there is a possibility that one or both individuals may feel that the exchange is not equal and that there will be no inequity if compared individual's inputs and outcomes matches their own inputs and outcomes. If this does not happen; it is assumed that the relationship is not equal and this situation leads to tension between individuals in search of equity (Balassiano & Salles, 2012: 271).

According to equity theory, if ratio of outcomes to inputs of the individual is greater than referents, customers will be satisfied (Ellyawati, Purwanto, & Dharmmesta, 2012: 89). Otherwise, the feeling of inequity creates anger against the service provider and this anger may cause dissatisfaction (Bambauer-Sachse & Rabeson, 2015: 120). In this sense, it can be said that positive or negative results may arise depending on the perception of equity. According to Nguyen and Klaus (2013: 311) while positive results include; loyalty, better reputation and re-patronage, negative results include; complaints, dissatisfaction, switching behavior, negative word of mouth, distrust and consequently damage to the brand.

Individuals experience cognitive dissonance when inequity is perceived after reviewing the inputs and outcomes of themselves or others and the discrepancy between them is higher than when the equity is perceived (Carrel & Dittrich, 1978: 203). Accordingly, it can be said that there is a connection between the perception of equity and dissonance. Thus Joshi (1990: 789) stated that inequity may affect attitudes of individuals and that the theory of equity is based on the cognitive dissonance theory developed by Festinger. Huppertz, Arenson, and Evans (1978: 250), who treats the theory of equity as a special interpretation of cognitive disonance, states that in a situation where cognitive mismatch occurs, there is a need to restore balance or equity in individuals and that individuals may resort to the following methods to reduce inequity.

- Increase inputs if they are low in relation to outcomes and the inputs of appropriate referents
- Decrease inputs if they are high in relation to outcomes and the referent's inputs
- Increase outcomes if they are low in relation to inputs and the referent's outcomes

- Decrease outcomes if they are high in relation to inputs and the referent's outcomes
- Leave the exchange module
- Psychologically distort inputs or outcomes
- Distort the referent's inputs and outcomes
- Change the referent

Although the theory of equity is related to the theory of cognitive dissonance, it is stated in the literature that the theory is also associated with social exchange theory. Akduman, Hatipoglu, and Yuksekbilgili (2015: 3) states that the theory of equity is based on Homans' social exchange theory and in this theory social relations come to the forefront and those relations are shaped according to cost and benefit. As a result, it is stated that the equity theory offered by Adams is based on Homans' Social Exchange Theory and Cognitive Disonance Theory developed by Festinger (Aksoy, Aslantas, & Arslan, 2016: 23).

In the theory of equity, two criteria based on equity are defined as distributive justice and procedural justice (Palmer, Beggs, & Keown-McMullan, 2000: 515). Distributive equity is based on Homans's rule of justice, where a person's rewards in exchange should be proportional to his or her investments (Olsen & Johnson, 2003: 186). According to Homans, distributive justice focuses on the distribution of rewards between individuals or groups (Fernandes & Calamote, 2016: 37). Procedural justice; focuses on the impact of basic procedures applied to identify outcomes (Xia, Monroe, & Cox, 2004: 1). Speed and timing of dealing with complaints in terms of procedural justice in relation to perceived justice of procedures applied during the compensation of the service is important (Choi & Choi, 2014: 111). Apart from these two types of justice, in the literature, interactional justice is also mentioned in relation to equity theory. Interactional justice is the relevance of interactions between the service providers and customers during service failure and service compensation in terms of explanation, honesty, courtesy, and empathy (Saraswita & Yasa, 2017: 21).

It is stated that equity theory is used to increase the understanding of many different subjects such as satisfaction, service failures, relations between customer and business (Tanrıkulu, 2015: 131). As a matter of fact, many studies have been conducted about this theory since it was found in 1963 (Cook & Parcel, 1977; Carrell & Dittrich, 1978; Huppertz et al., 1978; Romer, 1979; Leventhal, 1980; Fisk & Young, 1985; Oliver & DeSarbo, 1988; Oliver & Swan, 1989; Swan & Oliver, 1991; Joshi, 1990; Sweeney, 1990; Goodwin & Ross, 1990; Goodwin & Ross, 1992; Lapidus & Pinkerton, 1995; Boyd & Bhat, 1998; Ruyter & Wetzels, 2000; Palmer et al., 2000; Olsen & Johnson, 2003; Fadil et al., 2005; Lacey & Sneath, 2006; Gelbrich, 2011; Balassiano & Salles, 2012; Kwon & Jang, 2012). In the studies, it is seen

that especially reactions towards the perception of equity and inequity are focused on, and relations between equity perception and different variables are discussed. It was determined that perception of equity was handled together with demographic features, satisfaction, quality perception, trust perception, loyalty, commitment and intention. There was no study found to determine bibliometric profile of research on equity theory within examined studies.

Methodology

In this study, articles published in the Journal of Retailing and Consumer Services in the last five years about equity theory have been examined. The articles were evaluated on the basis of different bibliometric characteristics. Bibliometrics as a scientific research; it is stated that in accordance with the statistical results obtained with statistical analysis of data such as author, subject, cited author, cited sources helps to reveal the general structure of a particular discipline (Zan, 2012: 15).

In order to determine the evaluation criteria, studies aiming at bibliometric profile of different publications were examined (Cicek & Kozak, 2012; Ozel & Kozak, 2012; Zencir & Kozak, 2012; Sahin & Acun, 2015; Temizkan, Cicek, & Ozdemir, 2015; Tayfun, Kucukergin, Aysen, Eren, & Ozekici 2016; Yılmaz, 2017; Erkol Bayram, Bayram, & Karacar, 2017; Tayfun et al., 2018). In this context, studies on equity theory were decided to be evaluated according to the criterias of year of publication, number of authors, number of pages, keywords, number of references, research topic, type of research, data collection tool, sample group and sampling method.

In this study, only articles published in the Journal of Retailing and Consumer Services were evaluated. Equity theory is mainly related to the perception of equity of the individual as a result of comparing input and outcome of the individual with referent. According to the theory, individuals who buy or use a product are emphasized. In this direction, Scopus (Elsevier, 2019a), which is the largest abstract and citation database of peer reviewed literature (scientific journals, books and conference procedings), has been searched for journals with the words “customer or customers” and “consumer or consumers” in the title (Scopus, 2019). Five journals with the word customer or customer were found in the title. It is seen that three of these five journals are no longer included in the database and one entered the database in 2018. The last remaining journal’s subject area was not marketing. As a result of the search made with the words “consumer or consumers”, a total of 24 journals were found. Eight of these 24 journals were no longer included in the database. It was seen that the remaining 16 journals had different subject areas. Eight of the 16 journals included marketing within the subject area, but within those eight journals there was only one journal whose subject area consisted only of marketing. This journal was

the "Journal of Retailing and Consumer Services". The Journal of Retailing and Consumer Services began its publication in 1994. Language of the journal is English. For the year 2018, it could be seen that the Impact Factor of this journal is 3.585 and Source Normalized Impact per Paper (SNIP) value is 1.559 and SCImago Journal Rank (SJR) value is 1.211 and CiteScore value is 4.53 (Elsevier, 2019b). In order to determine the equity theory among the articles published in the journal, all published issues were examined year by year from 2018 backwards. Previous years were not examined due to the publication of one article on equity theory in 2014.

Results

The journal was published four times a year from 1994 to 2000. In addition, the journal was published six times a year from 2001 to 2018. Between 1994 and 2014, 21 volumes and 110 issues were published within the scope of the journal. Between 2015 and 2018, 24 volumes were published. In the last five years (2014-2018) which are considered in this study, a total of 720 articles were published in the journal. Distribution of the articles related to equity theory in all articles is given in Table 1.

Table 1
Distribution of articles by years

Years	Total Number of Articles	Concerning Equity Theory
2014	115	1
2015	103	4
2016	168	8
2017	157	8
2018	177	10
Total	720	31

In a total of 720 articles published in the last five years, equity and equity theory words have been searched within each article in order to find articles on equity theory. Out of 720 articles, 31 articles which were found to be related to equity theory were examined. The distribution of the articles evaluated by the number of authors and the number of pages is given in Table 2.

Table 2
Distribution of articles by number of authors and number of pages

Number of Authors	Quantity	Percent	Number of Pages	Quantity	Percent
1 author	3	9.7	1-10	24	77.4
2 author	13	41.9	11-20	7	22.6
3 author	7	22.6	Total	**31**	**100**
4 author	5	16.1			
5 author	3	9.7			
Total	**31**	**100**			

When the distribution of the articles according to the number of authors was examined, it was discovered that articles with two authors are predominant. 41.9%

of the articles have two authors. The lowest rates are in single-author and five-author articles. The rate of articles with a single author and five authors was 9.7%. However, it was revealed that 77.4% of all articles are between 1 and 10 pages. Table 3 presents the distribution of the articles by the number of keywords.

Table 3
Distribution of articles by keyword number

Keywords	Quantity	Percent
No keywords found	1	3.2
3 keywords	5	16.1
4 keywords	6	19.4
5 keywords	11	35.5
6 keywords	2	6.5
7 keywords	5	16.1
8 keywords	1	3.2
Total	**31**	**100**

A total of 149 keywords were used in all articles. When the distribution of articles according to the number of keywords were examined, it was found that the majority of the articles (35.5%) have 5 keywords. When keywords of the articles were examined, it showed that only one of the articles published in 2016 contained the word equity theory. However, it was found that the words justice or fairness was frequently used in keywords (18 times). At the same time, other frequently used words within keywords include satisfaction (9), intention (6), loyalty (6), trust (3), and word-of-mouth (2). Table 4 presents the distribution of the articles reviewed by number of references.

Table 4
Distribution of references in articles

	Quantity	Percent
Article	2080	84.83
Book	234	9.54
Other	138	5.63
Total	**2452**	**100**

The minimum number of references used in an article was 35 and the highest number of references was 139. It was found that mostly articles were used in the references. Other sources mostly included proceedings, doctoral dissertations and master's theses and internet resources. Sources like book reviews, institution reports, or researches, and data provided by companies and homework were also included in article references. As many as 50-99 sources were used in the articles. It has been found that 7 articles use more than 100 sources and 5 articles used less than 50 sources. The distribution of all articles by subject is given in Table 5.

Table 5
Distributions of articles by subject

Subjects of the Articles	Quantity	Percent
Price (price differentiation, price fairness and price sensitivity)	7	22.58
Service failures - Compensation of service failures	6	19.35
Perception of justice	5	16.13
Loyalty programs	3	9.68
Technology (augmented reality and search engines)	3	9.68
Brand value - Brand popularity	2	6.45
Other	5	16.13
Total	**31**	**100**

In order to determine the subjects, titles and abstracts of all studies were read. Six topics were found: perception of justice, price, service failures and compensation, loyalty programs, technology, and brand. Articles are classified under these topics. The articles mostly deal with price and service failures. It was found that price related issues were examined together with perceptions of fairness, trust perception, value perception, satisfaction, purchase intention, word of mouth intention, and cross buying behavior variables. The issue of service failure and compensation has been examined with the issues of value, perceived justice, loyalty, positive word of mouth, repurchase intention, satisfaction, brand credibility, and online revenge behavior. It has been determined that the perception of justice is mostly handled with subjects of satisfaction, commitment, perceived trust, and behavioral intentions (such as repurchase, loyalty, word of mouth). In the other group of articles, topics of customer citizenship, customer relations, coupon use, retailer or service provider to request positive evaluation from consumers after the purchase and evaluation of the impact of supplier and consumer efforts on customer satisfaction are included. When the research approaches adopted in the articles are examined, it was seen that all 31 articles adopt the empirical research approach. The distribution of the articles according to the data collection technique used is given in Table 6.

Table 6
Distribution of articles by data collection technique

Data Collection Technique	Quantity	Percent
Experiment	16	51.6
Survey	10	32.3
Interview	1	3.2
More than one technique	4	12.9
Total	**31**	**100**

When the articles were examined in terms of data collection techniques, it was seen that a mostly experimental technique was used. It is stated that this technique is increasingly used in social sciences (Coskun, Altunısık, Bayraktaroglu, & Yıldırım, 2015: 66). In social sciences, an experiment is defined as a type of observation performed by the experimenter to test hypotheses and to reveal the effect or direction

of the independent variable on the dependent variable (Islamoglu & Alnıacık, 2016: 129). As can be seen, in order to test the hypothesis in experimental technique, it can be said that the conditions were created by the researcher. In the articles examined, it was seen that the desired conditions were created with the help of scenarios in the articles which have adopted the experimental technique. In the articles reviewed, it was seen that experimental technique was followed by a survey and interview. In the articles where more than one technique was used, combinations of interviews, surveys, focus groups, and document analysis techniques were used. The distribution of the collected articles in terms of the sample group is given in Table 7.

Table 7
Distribution of the articles by sample group

Sample Group	Quantity	Percent
Consumer - Customer	14	45.2
Student	6	19.4
Unspecified	5	16.1
Employee	1	3.2
More than one sample group	5	16.1
Total	**31**	**100**

It was determined that data was collected from consumers and customers in 45.2% of the articles reviewed. In 19.4% of the articles, it was seen that data was collected from students and it wasn't specified where data was collected in 16.1% of the articles. In some studies, it was seen that data was collected from more than one sample group. In these articles, data was collected from the combination of different audiences such as students, consumers, employee, business owners, or partners. Distribution of the articles according to the sampling method is given in Table 8.

Table 8
Distribution of articles by sampling method

Sampling Method	Quantity	Percent
Convenience sampling	10	32.26
Purposive sampling	2	6.45
More than one	1	3.23
Unspecified	18	58.06
Total	**31**	**100**

When distribution of the articles according to the sampling method was examined, it was determined that 58.06% of the articles did not specify sampling method. It was seen that a convenience sampling method was adopted in the articles which stated a sampling method. However, two articles used a purposive sampling method.

Conclusions and Recommendations

In this study, it is aimed to present a general framework about studies on equity theory by examining articles according to various bibliometric factors and that were

published between 2014-2018 in the Journal of Retailing and Consumer Services. Accordingly, firstly the distribution of articles by years was examined. It was seen that most of the articles on equity theory were published in 2018 and that the publication number has increased in years from 2014 to 2018. The articles were mostly prepared by two authors and the number of pages was between 1 and 10. The articles were found to have a different number of keywords, but most of them had five keywords. It was noted that the word justice was frequently used within the keywords.

When the distribution of articles was examined, it was found that the most used source was articles. In the articles containing equity theory, it was determined that the issues of price, justice perception, service failures, and compensation of service failures were prominent. These issues are mostly addressed together with variables such as value perception, trust perception, satisfaction, and behavioral intention. In the articles, the most used data collection techniques were experiments and data was collected from customers/consumers. Accordingly, considering the journal is related to retailing issues, in studies dealing with perception of equity, it can be stated that more weight is given to customers and consumers. Although the sampling method was not mentioned in the majority of articles, it has been determined that the convenience sampling method was the most used among the mentioned studies.

When the literature is examined, it is not possible to compare results because there is no study aiming to obtain a bibliometric profile of equity theory. In this respect, it is thought to contribute to the literature of the study. A number of findings have been put forward, such as which topics are covered by theory studies, from whom data is collected, or which methods are used. Based on these findings, information about the current situation is provided for the studies to be carried out in order to learn more about the theory. It is seen that most of the studies carried out with equity theory concentrate on price related issues. If this situation is evaluated in terms of implementation, it can be said that price-related policies should be planned more carefully by enterprises in order to prevent individuals from perceiving inequity. Studies also focused on service failures and compensations for these failures. In the face of service failures, the individual perceives inequity and enterprises apply various compensation methods to reduce this inequity. These compensations have many consequences such as satisfaction, dissatisfaction, loyalty, positive or negative intention. For this reason, it can be stated that in order to restore the perceived deterioration of equity or to achieve positive results, especially in case of service failures, enterprises should compensate for failure in a way that ensures equity.

This study has some limitations. In this study, only articles published in a particular journal between specific years were examined. In this study, it is aimed to

present a general framework about the studies dealing with theory in a given journal in a certain period. Therefore, in order to obtain more comprehensive information, boundaries can be extended or more than one journal may be addressed in future studies. Or comparisons can be made by analysis of the studies on equity theory in different fields.

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Exploring Newcastle's Potential as an Industrial Heritage Tourism Destination

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Abstract
Coal, a prominent factor in the origins and growth of the European settlement of Newcastle (New South Wales, Australia) is not a part of the current city's narration. The city in some ways is still governed by the mines of the penal settlement but a tourist may remain oblivious to this when they visit. This paper looks at the tourism potential of Newcastle's mining heritage. It introduces the factors considered in terms of a heritage site, the importance of memories related to heritage structures, the role the industrial landscape plays in a city's social and economic life as well as rehabilitation aspects. This research was done based on qualitative and quantitative methodology drawing on a comparative analysis of case studies. The detailed analysis of four case studies on industrial heritage tourism was executed based on heritage value, transformed spaces, the businesses the sites support, factors of authenticity, site areas, revenue generation and average footfall. This research helps to identify the positive traits of Newcastle in terms of mining heritage tourism and opens the possibility of future research.

Keywords
Newcastle (New South Wales, Australia) • Industrial heritage • Tourism • Mines

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Introduction

Newcastle in New South Wales (Australia) has had a rich history since its inception in 1797. It was initially a convict settlement, then a free coal town with railways, shipyards and also allied steel industries which helped the city to grow to how we know it today (Murcott, 1892-1901; Hardy, 2015; Eklund, 2005). Currently the city is largely reliant on the health and education sector, whilst the local government is still trying to attract more inhabitants and is developing new schemes to promote the city (NCC, 2016 a & b).

However, despite the city showing and embracing the markings of history through its buildings and industries, less has been done to address the convict-made structures and mines which could open potential to develop a new heritage tourism scheme. This is quite surprising considering the maze of underground mines existing in the downtown and surrounding suburbs of Newcastle that are notorious for creating financial and logistical hurdles in the construction of high rises in the city (NCC, 2018). Construction and redevelopment of the downtown area is restricted and property damages have been reported owing to subsidence due to mining in this area (Page, 2014).

Admittedly, the government is currently in the process of locating and mapping the old convict mines to accurately update the mine subsidence maps (NCC, 2018) and local community initiatives, such as *The Hunter Living Histories*, have also tried to gather more knowledge on the Newcastle mines. Looking at the mines as a possible source of income (and increase of population through tourism) has not been fully investigated in Newcastle, although there are many examples of commendable practices of heritage tourism specifically related to mining heritage.

Therefore, this research looks at the tourism potential for Newcastle's mining heritage. The paper is divided into four sections. The first section introduces a literature review on the importance of memories related to heritage and some existing examples of old mines that have been converted into tourism destinations. This is followed by the methodology section, which also includes the Newcastle context. The third section concerns the analysis of the featured case studies prior to the section's discussion and conclusion.

Literature review

Several scholars have discussed the significance of collective memory. Specifically, Halbwachs (1992) wrote about the 'memory' of people who visit places and how the physical surroundings leave a lasting impact on the individuals occupying these spaces. Spaces become a part of the users and the memories they create. The users build a relationship with spaces without realising it (Halbwachs, 1992). Bachelard

also explained the importance of built forms for the human psyche in the *Poetics of Space* (1994), emphasising how the structures people use remain with the people long after they have been destroyed, and how the experiences people have in them cannot be destroyed even if the physical structures themselves can (Bachelard, 1994). Pallasmaa (2009) re-centred heritage as a tangible aspect of memory and as a means for societies to preserve memory. Places of historic, cultural and regional significance are demarcated by preserving a visible tangible aspect (Pallasmaa, 2009).

Heritage is clearly a legacy from our past, a living, integral part of today's life, and, as almost anywhere else in the world, the Australian government recognises heritage and has enacted laws for its conservation. As per the Environment Protection Biodiversity Conservation Act in Australia, the heritage value of a place is defined as including, "A place's natural and cultural environment having aesthetic, historic, scientific or social significance of other significance, for current and future generations of Australians" (EPBC, 1999). In addition two successive Australian-focused analyses, respectively based on surveys conducted in 2005 (Armitage and Irons, 2013) and 2010 (McDonald, 2011) confirmed the strength of support within the community for a wide range of heritage considerations including education, identity and culture.

However, given the relative size of Australia (the planet's sixth largest country), it could be argued that heritage has not yet reached its full significance (and hence protection and conservation), when looking at the number of Australian properties listed on the world heritage list: there are 19 of them, which represent 1.73% of the UNESCO list (WHC, 2018). This could be explained by the lack of envisioning the positive relationships between heritage conservation and economic benefit, as found in the 2005 survey (Armitage and Irons, 2013). Others, such as Carter and Bramley (2002), propose that this discrepancy might come from a lack of integration into the management process.

Specifically, regarding the benefits of heritage, there is a wide range of scholarship demonstrating what heritage places can positively deliver, both at the individual as well as at the broader level of society overall (AGPC, 2018; Armitage and Irons, 2013; Lichfield, 1997). In the same way, several scholars have already discussed and demonstrated at length the economic and social benefits of heritage in the context of tourism (Dupre, 2018, Gravari-Barba,s 2013; Goodall, 1993). The latter for instance underlined the symbiotic relationship between heritage and tourism, since heritage sites generate tourism and tourism generates income to assist with the upkeep of those sources whose economic rationales have declined or disappeared (Goodall, 1993). This effect may be short term or long term depending on the reuse of the sites. In the region of Wales (UK), the government is taking efforts to make the

locals aware of the benefits of tourism and community tourism. The benefit of this being that the money the tourists will spend on local attractions will stay within the local community, safeguarding local jobs and encouraging regeneration (Williams, 2013). This is affirmed by Chand (2013), in his study on how residents perceived the benefits of heritage and support tourism development in Pragpur, India. He shows that tourism can generate good income, develop the local economy, and bring about other possible benefits such as employment and local access to outside goods and services (Chand, 2013). Furthermore, his study is a good example of pro-poor tourism because it embraces the different cultural realities rather than hiding them. This example takes into consideration the local scenario and promotes it with application of other limitations like the income difference between the visitors and the locals.

Tourism is also a great opportunity and alternative for areas in decline such as former industrial sites (Beaumont 2018; Gravari-Barbas 2013; Del Pozo et al. 2012; Dupre, 2010). For instance, it can bring a higher standard of living (Lichfield, 1997) and indirect or passive use value (Throsby, 2012). It can also provide a new source of economic activity with enormous potential for social and business development and job creation (DOIIS, 2018); yet every area is unique and the driving force behind heritage tourism is different. UNESCO recognises this and tries to generate awareness in their meetings regarding the positive influence of a UNESCO world heritage site (Garrod, 2014). Within this context, it has long been researched that authentic experiences and places are key-factors for successful tourism development (Taylor, 2010; Theobald, 2005; Leary and Sholes, 2000; Bell, 1999).

Importantly, authenticity is not bound to one type of heritage tourism (or even tourism at large) or to one type of expression. Places and voices convey authenticity while transitioning industrial heritage sites into tourist attractions (Leary and Sholes, 2000). This latter aspect is emphasised in the research conducted by McQueen (2012) who concludes that creating awareness about the mines and creating mining tourism contributes in educating the community and new generations to understand the need of mining that we have as of today. This is confirmed with the research conducted by Misztal (2003), who demonstrates how the re-integration of old industrial structures with modern amenities has revitalised the structures and given the people a part of their history back in their daily lives in the Warsaw region (Poland). Weaver (2011) observed a similar phenomenon with the industrial heritage of Lowell and Leeds, once forgotten, now proudly projected. The factor of authenticity ushers in a need for a relatable link to the visitors when they visit a site.

Furthermore, industrial heritage also calls for a variety of experiences. Leary and Sholes (2000) show how curators and historians of industrial museums feel the need to conserve places but also the voices that attract and inform the public. They say

that merely focusing on the surviving items and treating them as display pieces is not enough, inclusion of the factory complexes, landscapes, and entire communities should be a part of the voice which tells the story. Recovering industrial experiences calls for immersion in the details of everyday life. The physical features of textile mills, for example, differ from those of steel plants in scale, sounds, smells, and other sensory details. The people who laboured in different environments speak of the specific characteristics of their work (Leary & Sholes, 2000).

Lastly, regarding the specific topic of mines, it is obvious that all mines might not transition into heritage and tourism destinations. Some are used as garbage dumps (Ward, 1989) or recreational areas (Mallo et al, 2010), clearly generating income and jobs and supporting communities nearby but overlooking the heritage aspect. Others, however, are interesting, especially for this research, as they are places that transitioned to heritage tourism. For example, Hallet (2002) researched the Wieliczka Salt Mine, which is one of the oldest continuously operating industrial ventures in Poland, having started production in 1290. He demonstrated how the government has utilised the heritage value of the salt mine that is still being operated to create awareness, promote business and generate income from an active mine (Hallett, 2002).

Another interesting case study is the failure of the Big Pit (Wales), which exemplifies what a mine could face regarding the footfall of tourists. The Big Pit closed as a coal mine in 1980 and was reopened as a "working" mining museum in April 1983 (Wanhill 2000). However, it was quickly realised that two challenges needed to be addressed. The first one concerned the mine accessibility as not everybody could or would want to take advantage of the underground experience which involved wearing five kilos of safety equipment (Wanhill 2000). The disabled, elderly, young children, and claustrophobics were thus excluded. The other challenge concerned the existing surrounding competition: nearby other cheaper tourism attractions existed, which were not properly considered when the mine was reopened (Wanhill 2000).

In conclusion, there is no doubt that heritage and the idea of conservation comes from a connection to the past, which needs to be recognised. To address them, understanding the affecting factors are important. In the same way, heritage tourism and the reuse of mines are both complex topics in themselves. Research has shown that heritage tourism works very well if all the factors related to redevelopment are considered; one cannot reuse a space unless the cultural, physical and environmental factors are considered. There is evidence of research regarding the rehabilitation of mines and examples of successful reuse of closed mines. There is also evidence regarding the reuse of significant structures as heritage tourism. Thus, this research is interested in drawing from this knowledge the guidelines and framework that would help Newcastle to embrace its mining heritage through tourism.

Thus the research objectives of this paper are twofold. Firstly, the research aims to produce an analysis to show how to use mining heritage in Newcastle (New South Wales - Australia) through a comparative case study approach of four mining case studies emblematic of post-industrial heritage for creating tourist attractions. Secondly, a SWOT (strengths, weaknesses, opportunities and threats) analysis for Newcastle will provide the basis for discussing how to promote the city from a heritage perspective and in relation to the findings from the case study analysis.

Method and Newcastle

Method

For this research a combination of qualitative and quantitative methodologies were used in order to investigate the potential of 'tourism mining heritage' in Newcastle. Firstly, field trips to Newcastle and data collection from archives and historical societies such as the *Hunter Living Histories* have helped to retrace the history of mines in Newcastle. They have helped to understand the broad context of mining in this city's past and present.

Then, a comparative and detailed analysis of four case studies, known as mine heritage sites, was conducted in order to evaluate and potentially recognise the 'recipe' for success. The need for these case studies is to understand the factors affecting a heritage site. The case studies were selected according to their function (mining heritage) and evaluated with seven criteria that were drawn from the literature review. The first criterion concerns heritage value by using a worldwide recognised benchmark, that is listing on UNESCO's world heritage sites. Criteria two, three and four represent general quantitative data such as site area, annual revenue and annual visitor footfall respectively, to give a comparative overview across the four case studies. The last three criteria give more qualitative insights in terms of experience deemed authentic; businesses associated with the mines and transitioned spaces. Transitioned spaces are to be understood as those refurbished or reused spaces which are used for new purposes.

The review through the above-mentioned comparison aims to study and recognise the influence of the features or aspects of Newcastle. This research can lead towards redefining a lost heritage and understanding the possibilities of future development through a detailed procedure. Newcastle's history is rich, but it can learn from these case studies to further develop its industrial heritage. Successive strategies can be prepared to work towards a sustainable, heritage oriented and tourist friendly destination in Australia's first coal mining town.

However, this research has certain limitations. The main limitation relates to the topic of research itself. Firstly, it was not possible to visit the mines and assess them in terms of heritage as they are not currently open for the public. The fact that Newcastle's maze of underground mines lies right beneath the existing city is a big limitation in itself. The city might not possess enough revenue to resurface the mines on a grand scale and if it is given a serious consideration, the question remains as to who will bear the cost. Secondly, the location of these mines is also a limitation. Most of Newcastle's mines were traced back to their exact locations by the Hunter Living Histories in 2006, yet not being able to visit them also hindered the results. A third limitation regards the selection of the case studies themselves. As it was quite impossible to find a replica of Newcastle's conditions elsewhere, the choice of relevant case studies was deliberately reduced to mining industrial heritage which has been retrofitted for tourism purposes. Stages of development and mining product were not taken into consideration. This limits the depth of the comparison. However, despite the limitations, it is believed that the current research is relevant in order to establish grounds for the mines to become heritage tourism attractions.

Newcastle

This section presents a historical overview of Newcastle that provides a background to the interest in developing mine heritage tourism.

The entire city of Newcastle has seen extensive mining in the last two centuries since the discovery of coal in the region and is still working on various underground and open cut mines in the suburbs and countryside to extract more and more coal for export. The Awabakal are believed to be the only Aboriginal tribe to discuss coal in their Nikkin legends (Goold, 1981). In the same way during the first visit of Lieutenant John Shortland (1797), who made a preliminary survey of the area that would later become Newcastle, he was the first to discover the coal and reported it to the authorities in Sydney (Goold, 1981; Murcott, 1892-1901). This indicated the start of the Australian coal mining industry and the vertical coal shafts in the Government Domain are believed to be the first in use in Australia and possibly the entire southern hemisphere (Hardy, 2015; Henry, 1969).

Interestingly, the development of coal mining in Newcastle was firstly based on private initiatives and convict labour forces, and even with the instalment of the Government Domain, the few number of plans that exist today not only show the lack of research but also the lack of interest towards this mining history. The growth of the mining industry in Newcastle is still ongoing and the city currently handles some of the largest exports of coal in the world and has one of the most efficient and largest coal handling ports in the world (Slezak, 2017). This coal has shaped Newcastle's history over the years and helped bring heavy industry to the town. It is

an important part of the city's heritage which contains an uncovered maze of tunnels under the city (Eklund, 2005; Gerber, 2014). However, despite the current mapping of the mine subsidence (figure 1), more work needs to be done to provide better historical accuracy in order to recognise these mines as heritage sites and potential tourism attractions. The underrepresentation of the mines in the current built fabric of Newcastle ushers in the need for this research.

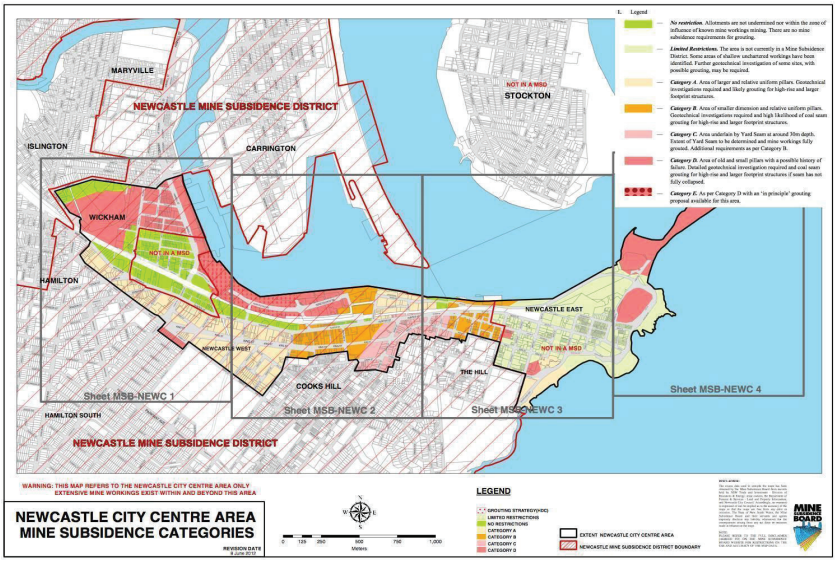

Figure1. *Mine subsidence map released by NCC, 6th June 2018.*

Learning from other mines

Case Studies

This section concerns a comparison of four case studies, all regarding mining heritage tourism, the aim of which is to extract best practices and an understanding of the processes at stake. Admittedly, not all the selected case studies were concerned with coal mining - one is for salt mining, the other for gold mining - but all of them are examples of the use of industrial heritage for tourism purposes. This aspect was considered prevalent in the case study selection. From the case studies, context, processes and results were analysed. The first three cases - the Zollverein Mine (Germany), the Big Pit Mine (England), and the Wieliczka Salt Mine (Poland) were chosen for their UNESCO listings and huge success, while the last represented an Australian case (Sovereign Hill).

As part of the industrial history of the Ruhr Valley and the once largest coal mine in Europe, the Zollverein Mine is a symbol of the rise and fall of German heavy

industry, with the economic and political impact it had in the country's history (Dorstewitz, 2013; Hemmings and Kagel, 2010). The Zollverein closure in 1986 brought about economic and social changes that the region had to grapple with and despite years of uncertainty and struggles (well described by Dorstewitz (2013)), the former mine managed a remarkable transformation, becoming not only a cultural icon but a World UNESCO heritage site bringing a footfall of 1,250,000 people every year (Zollverein, 2018). The successful tourism destination combines historical consciousness alongside the creative use of buildings and structures for museums, exhibitions, concerts, film screenings, and other cultural or recreational activities such as rock climbing (Hemmings and Kagel, 2010; Zekas, 2009; Bösch, 2015). The link to the mine itself is provided with a variety of experiences that challenge the visitors senses. For example, the chambers are not heated and this acts as a simple reminder of the harsh conditions of the miners; as well as the dark steps in some parts that provide an authentic experience. The retention of some original buildings, such as the unique double pit head tower, also contributes to the authenticity of the place. The sum of the activities and projects mentioned above has helped to shape anew the very distinct character of this site and give it a new functionality, shaping cosmopolitan memory (Dorstewitz, 2013; Beaumont, 2018; Barndt, 2010).

The Big Pit Mine in England shares a similar trajectory. Located in South Wales and historically well reputed for its industrial background, the Big Pit opened as a 'working mine museum' in April 1983, just three years after its closure (Wanhill, 2000; Davies, 1984). As already mentioned previously, the Big Pit did not initially see the expected visitor numbers and underwent serious planning to eventually become a property of the UNESCO world heritage list and now welcomes over a million visitors each year (Wanhill, 2000). Authenticity is provided through the conservation of the industrial landscape but also with human interaction as the ex-miners are the guides for the museum. The oral narration by the ex-miners is a key element in the experience and the view of the miners in their uniforms and experiencing the cold underground conditions wearing protective gear does engage the visitor to the fullest (Davies, 1984; Coupland and Coupland, 2014). The Big Pit and surrounding areas are indicators of how ordinary people worked and lived in coal mining districts of the industrial era (Davies, 1984). Other than the mine, there are cafés and souvenir stores, a blacksmith's shop which provides goods, galleries exhibiting the coal and other older structures. In targeting and showcasing how ordinary people lived and worked in coal mining districts, the Big Pit eventually succeeded its transition by creating awareness, developing recognition and using well-thought promotion.

The Wieliczka Salt Mine in Poland presents a somewhat different story, as firstly it concerns salt extraction; secondly it has a longer working time span (from the 13th century onwards) and thirdly, it is still partially in use in the lower levels with the upper

levels having been converted into a tourist attraction. Furthermore, besides being a UNESCO listed heritage site, Wieliczka Salt Mine has been recognised as a geopark, that is a geologically important landscape (Alexandrowicz & Alexandrowicz, 2004). The world's oldest salt mine provides a museum, has an indoor lake, contains a church and attracts over one million visitors every year (WSM, 2018). The Josef Pilsudski Chamber, which is a double chamber with a lake, was a popular venue for receptions and entertainment before the First World War. The stories of the Nazi occupation of Poland, the use of one of the larger chambers as an aircraft engine factory which used Jewish slave labour, and the escape of two young boys hiding in the mines, engage the visitor with an active relatable dialogue with the surroundings (Hallett, 2002). At the end of the visit, the possibility to buy salt related products also provides a positive participatory experience (Wu et al., 2015). The Wieliczka Salt Mine also hosts a range of additional activities ranging from international fairs to concerts, conferences and a range of parties. There is also an underground tennis court and field for team sports. The Wieliczka mine also became the first mine to host an underground hot-air balloon flight and "Bungee Jumping Show", while a tourist route broadens the tourism attraction (Kruczek & Szromek, 2011). These additional experiences make the Wieliczka mine a complex hub of activities which draws tourists, in turn retaining visitor numbers and increasing popularity.

The last case study concerns Sovereign Hill which has recreated the 1800's gold rush in Australia in the small town of Ballarat. The use of the original site and recreation of the 1800's has led to a tourist destination which brings in more than 500,000 people every year (SHMA, 2018). Frost's (2005) analysis showed that the size of the town, the site location and the local support for the venture, as well as their reconstructions that are based closely on the photographs of the period and from the varied range of activities provided have all allowed the site to generate revenue and achieve success. He also concluded that the unique attention to detail has been a factor which enhances the visitor experience, as the visitors feel that they have been transported back to the 1800's with trades, crafts and stores all being a part of the act (Frost, 2005). However the financial report of the Sovereign Hill Museum Association actually shows that the live experience of the gold rush is what today attracts major visitors, such as the underground mine tours, digging for gold as well as firing, sweet making and candle making (SHMA, 2018). Campbell (2015) also noticed that the celebration of the cultural identity of Ballarat and the fighting spirit of the miners also contribute to the experience; although the Aboriginal history is missing. This 'sanitising' history (Frost, 2005) perhaps reveals this little debated issue of heritage in Australia.

Overall, with these four case studies it was possible to evidence some similar factors in terms of engagement with the visitors. The following table (table 1) shows a comparison of the above case studies with the Newcastle site.

Table 1
Comparison of Case Studies in Regards to Newcastle

	Wieliczka Salt Mine, Poland	**The Big Pit Mine, England**	**Zollverein Coal Mine, Germany**	**Sovereign Hill, Australia**	**Newcastle**
Heritage Value	UNESCO WHS	UNESCO WHS	UNESCO WHS	Not listed but has value due to the site of Gold Rush	Not listed but has value due to its coal mining origins
Site Area (Approximate)	2728 Acres	12.3 Acres	247 Acres	25 Acres	720+ Acres
Revenue Generation (Annual Approximate)	26.13+ Million AUD (16.5+ Million Euro)	59.65+ Million AUD (33+ Million GBP)	Not found	$20+ Million AUD	$30+ Million AUD (estimated)
Average Visitor Footfall (Annual)	1,200,000	1,549,603	1,250,000	560,000	3,000,000 (Total visitors estimated)
Authentic experience	Underground levels with geological features	Underground coalface working conditions with ex-miner guides	Structure size, unheated spaces with dark steps	Live experience of gold miners from 1850's recreated	Potential
Business	Shops, cafes, restaurant	Shops, galleries, blacksmith shop, café	Exhibition spaces, open air cinema, ice skating rink, shops	Shops, galleries, exhibits, theatre	Potential
Transitioned spaces	Museum, lake, church	Working Mine Museum	Museum, rock climbing wall	Museum, living quarters, activities	Potential

Results

Several findings emerged from the comparative analysis. The first concerns the need (or not) for a mine heritage site to be UNESCO listed. In this research, three out of the four case studies are UNESCO world heritage sites. UNESCO listing presents some advantages such as the publicity it brings once listed. World heritage sites reach such a global audience that it helps in generating awareness and earning recognition not just in the region, state, province or in the country but, in the entire world. Thus, it contributes in publicising important landmarks and reinforces a region's identity (Chand, 2013). However, some scholars have also denounced the negative impacts that UNESCO listing could have (Harvey, 1982; D'eramo, 2014). In this analysis, the last case study is not in the world heritage site listing but it is still considered successful. As such, it shows that UNESCO listing is not an absolute requirement for success, yet there is no doubt that such a listing would contribute to the promotion of the city, creating awareness, and bringing more visitors.

The industrial mining background is the major context for these case studies as similarities can be drawn between them and Newcastle. This context provides tangible and intangible effects. Even though all of them vary in geographical

locations and context, the use of industrial machinery provides clear tangible traces that have been well used for mine retrofitting. For example, the visual impact of looking at the large machinery at the Zollverein mine (Germany) is astounding. The enormous scale creates a harsh, rough and crude atmosphere, that contrasts sharply with the surrounding developed lush green spaces that connect to the human scale. The use of machinery (working or not working) is not only to display its might, but also to connect the visitor with the historical role played by such structures. They also became important elements for industrial tourism. The industrial landscape can be an exciting opportunity to create new visual and special experiences for visitors. In the case of Newcastle, using machinery from Broken Hill Proprietary, or other industries which are closed now, could be used for a similar impact. In terms of the underground mines in Newcastle, if opened to the public, their accessibility, safety and other parameters need to be considered.

Not all machinery can be used as exhibits due to their level of disintegration or other factors. This may create a void of space. Void spaces have been transitioned in all the above-mentioned case studies. These spaces were transformed to make a continuous experience for the visitor. Additionally, transitioned spaces may be intentionally created for recreational activities. An underground lake or church, or a working mine museum can become a highlight for a tourist. These spaces are the ones that stand out for a visitor. These transformed spaces may also contain additional activities to enhance the visitor's experience.

The third finding concerns the analysis of businesses that are associated with the site. Additional businesses in support of the main heritage sites are seen across all the case studies. They range from food retail outlets (cafes, restaurants), to arts spaces (galleries, exhibition spaces, theatres) and plain shops or more specialised businesses such as ice rinks. This creates a variety of choices for the tourist visiting the site. Overall, the recurrent businesses are restaurants, cafés and retail stores. Some include entertainment businesses like theatres, galleries and exhibition spaces in addition to these spaces. Some specialty stores are also seen in a few of them like the salt store in Wieliczka mine and the blacksmith's shop in Big Pit mine. All these places have one goal - to generate enough revenue for the site. The local communities are supported by the tourists and a socially diverse dialogue is created. New jobs and business opportunities may arise helping the local economy grow and therefore generating more revenue. Newcastle can benefit from such diversity, revenue and opportunities.

The fourth finding concerns authenticity. Authentic experience has been discussed in the literature review as an important factor in tourism. Establishing a narrative of how the space or object stood the test of time over adverse circumstances gives it

significance. It also speaks about the people who lived in that era. All case studies have certain unique features which help in creating an authentic experience. These spaces accompanied by oral stories engage the visitor emotionally and help set up a dialogue with the space. This can leave a lasting impact on the visitor. This can be any space which highlights a rare phenomenon or space on the site. This can be as simple as retaining the same weather conditions, using the ex-workers as guides, or using audio visual tricks for an amplified effect. In the case of Newcastle, the ex-employees of the Broken Hill Proprietary or ex-miners could provide a narration of the techniques, technologies and schemes used in the procedures of the production. Findings related to the early miners could be displayed and narrated to understand the conditions of the penal colony and to create a dialogue with the visitors. For example, 'the lasting effects of working in the mines led to a miner becoming blind later in life' creates a powerful impact on the visitor. It speaks about history as it is without sanitising or sugar-coating anything.

The last findings are related to size, income and visitor numbers. The size is considered as the average space requirements to fit in such a diverse range of activities on a site. The areas vary from 12.3 acres to 2728 acres. So, the number of activities and the layout denote the size. The existing structures and the parts visible to the tourists can vary. In the case of Newcastle, the potential area could include the mine subsidence area downtown. The income is provided in some case studies, in others it has been calculated to understand the workings of such a diverse site. The need of generating enough revenue to sustain the site for future purposes is the core reason for these criteria. The aspect of an average annual number of visitors is used as all the case studies are well established sites. The numbers give a clear idea of the amount of footfall required to make sure that the site is financially viable and to create awareness. The calculations may be affected by a variety of factors like surrounding attractions, and local political and economic conditions. The footfall creates several possibilities for further businesses and for other related development. The case study of Sovereign Hill is important as it gives an Australian perspective of the average number of people in a year required to sustain a successful tourist destination.

Overall, a strategic approach to business planning can be observed in most cases. In the case of Sovereign Hill, there are schemes used to convince visitors to revisit the site by opening new attractions or activities periodically. In the case of Zollverein, new exhibitions and displays are the reason people revisit the site. Bringing more people into the site can also be achieved by involving local artists, universities and businesses. This can benefit the individuals but it creates greater public awareness and generates sensitivity among people related to the heritage. These examples also reflect that the aesthetics of mining landscapes have potential too. The conservation of these unique landscapes brings out the dark truth of human existence which needs

to be acknowledged and respected as well. The fighting spirit of people working in extreme conditions and surviving and shaping the environment - physically, socially and culturally - need to be celebrated. In the case of the Polish salt mine, research explores further possibilities of its classification as a geopark. This shows that after identification of a heritage site, it ushers possibilities of future research on a site.

Discussion

This research shows that there are certain obstacles to be overcome in terms of establishing a successful industrial tourist destination. The support from the local authorities, awareness amongst the people, and the recognition of a particular site in question are all factors whose support is monumental and can make or break a project. As seen in the case studies, public and government support are key factors in these types of rehabilitation cases, as well as financial commitment from public and/or private sectors. As of today, the question remains for Newcastle regarding who would be willing to consider such a project and its associated limitations.

The current situation in Newcastle doesn't show a great deal of support for heritage. For example, when looking at the Newcastle tourism website (NCT, 2018), it is clear that the city is not promoted for what it is, that is Australia's first coal mining town or even a heritage destination. Instead it uses ambiguous terms like a must travel destination with coastline, events and festivals – terms which may be used to describe most beach based cities in Australia. Could it be due to its proximity to Sydney or a general trend in Australia that does not place enough value on historical heritage? Furthermore, there is evidence of promoting the city as a sports destination by hosting the Supercars event in the city (NH, 2017) or marketing surf spots (Rhodes, 2011). Overall, this shows that Newcastle is reinventing itself but why are the unique aspects still overlooked? Specific studies should further investigate this aspect.

Other elements also confirm the lack of support for heritage. For example, with the recent closing of the Maritime Museum (which had more than 7,000 historical items) Newcastle lost another bit of its heritage (Lobb, 2018). Mismanagement, low visitor numbers, no rotational exhibits and the ageing population of its members were reported as the main reasons for its closing (Kelly, 2018). However, reading between the lines, it also speaks of a lack of interest in heritage education and preservation from the local authorities. This seems sadly confirmed with the latest news regarding the Wickham Arts building which has been a part of Newcastle's make-up since 1882 and which is probably going to be demolished as per the new development plan for Wickham (HLH, 2018). The city council's new development plan does not mention anything regarding the fate of heritage structures (NCC, 2017). There are major changes planned, like the introduction of the new light rail, and use of the railway

corridor for the future development of Newcastle (NCC, 2018), but promoting Newcastle from a heritage point of view is not part of it.

Other reports like the uncovering of 6000-year-old Aboriginal artefacts during the construction of a KFC and no incentive from the council to preserve the site reflects the situation of heritage in the city (Smee, 2018). An archived document in the University of Newcastle shows that 'Old Town' (Newcastle) was a part of Australia's national heritage list (NCCC, 1992) but the current list does not mention Newcastle (AGDEE, 2018). This leads us to the question: Why is nothing in Newcastle part of Australia's national heritage list? Is something being done to recognise this?

Lastly, the aim of this paper, through a comparative critical analysis of case studies was to show how to use the mining heritage in Newcastle (New South Wales - Australia) and how the findings might contribute to promote the city from a heritage perspective. The SWOT analysis (figure 2) helped in summarising some major elements to take into consideration for heritage tourism development and promotion. Firstly, it seems there is a significant drawcard not being used. Since Newcastle is still a main stakeholder in coal production, and even today at global level, mining tourism development could be authentically grounded and could also benefit from an interpretation center for its present activities. As such, marketing and promotion could rely on a past-present thread through innovative partnerships with the coal industry to stimulate both industry and tourism economies.

Figure 2. *SWOT analysis*

Secondly, it seems that work still needs to be done in regards to the collective memory of the city, as Newcastle does not yet fully embrace its history. One reason that could explain this situation is that, unlike the four analysed case studies, abandoned hard coal mines in this city were exploited using prisoners, which is associated with the problem of difficult or contested heritage. Mining heritage in Newcastle concerns

at least three of the contested heritage categories developed by Xiong, Dupre & Liu (2019): colonial, slavery and conflict. However many other heritage-based tourism attractions in Australia have successfully managed this aspect (see for instance, Port Arthur or the Adelaide Gaol); Newcastle could benefit from these experiences.

Lastly, with the mining heritage located right in the downtown's underground system, it could also be suggested that promotion might emphasise the educational value, as the proximity could draw locals, schools and university students.

Conclusion

This research has provided sufficient evidence that many industrial cities of the past have been successful in reinventing themselves and have succesfully used tourism as a new means of promotion. The benefits of the heritage conservation of such landscapes can be observed all over the World along with the value of industrial sites which were once considered obsolete or scars on the cityscape. Many of these sites have become heritage monuments, boasting extensive facilities and attracting numerous visitors. Newcastle's lost mines are a significant part of the city today as they still govern the built fabric, yet little has been done to use this tourism capital. In identifying their potential within Newcastle context, this research demonstrated that there are definitely practical implications possible. Firstly, this research can be used as a base to strategise the development of tourism in Newcastle, as the underuse of heritage in general and mine heritage specifically was clearly proven. Another implication would be to conduct a market analysis both within neighbouring cities and on a national scale, to evaluate more precisely the level of competition Newcastle might face if developing mine heritage tourism. Lastly, a tourism master-plan in coordination with the urban development services of the city would be needed to select the sites to open. Future research could investigate further the weight of contested heritage in the contemporary decision-making processes of Newcastle, as well as the economic system or model that would successfully balance mine heritage tourism development and urban development in its downtown.

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Learning During Wildlife Tours in Protected Areas: Towards a Better Understanding of the Nature of Social Relations in Guided Tours

Jonathon Spring[1]

Abstract

This article explores guided wildlife tours in Protected Areas (PAs) in the context of free-choice learning, social relations and environmental stewardship. Free-choice learning refers to people's informal learning that occurs without requisite external assessment such as schools or workplaces. While the literature argues that guides on wildlife tours in PAs should make visitors aware of a set of achievable on and off-site actions the informal nature of such educational activities is difficult to measure. Research on guided tours on Tiritiri Matangi, New Zealand highlights the complex nature of social interaction between tour participants and the factors that impact on learning during a guided tour. The nature of the social relations that inform guide visitor interaction (GVI) is discussed in the context of Relations Model Theory and free-choice learning.

Keywords

Guided tours • Learning • Protected areas • Social relations • Relations model theory • Wildlife tours

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Introduction

There is a growing recognition that wildlife tours operating in Protected Areas (PAs) need to advocate environmental stewardship and provide pathways for visitors to engage in conservation behaviour (Moscardo, Woods, & Saltzer, 2004; Orams, Spring & Forestell, 2014; Zeppel, 2008). A common refrain about the efficacy of guided tours in PAs in fostering environmental stewardship is that guides are preaching to the converted. This suggests that in such recreational venues a community structured through shared values exists, and that there is a tacit acceptance of the role of a guide in advocating environmental behaviour change.

A better understanding of the nature of the social relations that inform guide visitor interaction (GVI) may aid in estimating the value of free-choice learning on tours for participants and providers. This article uses research on guided tours on Tiritiri Matangi, New Zealand to examine the complex nature of social interaction between tour participants and the range of factors that facilitate or constrain learning during a guided tour. This offers an opportunity to extend existing work on the social roles of guides into a wider examination of how social relations that exist with an individual tour group impacts on learning outcomes (Weiler & Black, 2015).

Literature Review

Free-choice Learning

Free-choice learning refers to informal learning that doesn't necessarily involve the external assessment required in people's educational or work careers. The impulse for free-choice learning is personal. It is connected to an individual's discretionary time and income such as being on holiday (Falk, 2001; 2005). Free-choice learning environments are any space available to an individual during their discretionary time. In tourism contexts, research on free-choice learning has been conducted in museums and wildlife attractions (Ballantyne & Packer, 2011; Falk, 2001; 2005; Zeppel, 2008).

The term educational infrastructure was coined to highlight the interdependent nature of free-choice and formal learning and to demonstrate the scope of freely available resources that exist in the public sphere for all citizens of a nation to support all forms of education (Falk, 2001; Falk & Dierking, 2012; St. John & Perry, 1993). Free-choice learning involves accessing a range of educational infrastructure that ranges from public institutions such as museums, libraries and universities to private or not for profit organisations. Scientific and educational literacy are dependent on educational infrastructure that is made up of more than just physical resources and "can be thought of as an interwoven network of educational, social and cultural

resources" (St. John & Perry, 1993, p. 60). Much of the information that forms the basis of an interpretation programme at protected natural areas is based in science (Ham, 1992).

Ornithology can be used to illustrate the type of educational infrastructure that can inform free-choice learning. Ornithology is the study of birds. For some it is predominantly a scientific activity and for others the science merges seamlessly into a hobby. Concepts such as taxonomy and distribution are key components of ornithology, both as a science and a hobby; for example, ornithologists will note the sighting of a particular species of bird in the context of its rarity (its population status) or the location of the sighting in relation to that species' natural distribution (Braunias, 2007). The accessibility of the infrastructure of free-choice learning connected to ornithology in many Western-dominated societies is due to the existence of community groups such as the Ornithological Society of New Zealand (OS), which was founded in 1940. OS holds meetings where local residents share their birding knowledge and listen to guest speakers, provides members with its journal, *Notornis*, and runs field activities ranging from bird-banding, bird counts to trips to PAs (Braunias, 2007).

Guided tours in Protected Areas as Free-Choice Educational Infrastructure

Learning and the exchange of information have been identified as important constituents in a visitor's overall experience during a guided tour (Weiler & Black, 2015). Making visitors on a guided tour aware of the relevance of the relationship of the place visited and its ecology to their everyday lives is a challenge (Moscardo, Woods & Saltzer, 2004). However, such awareness raising creates the potential for guided wildlife tours to act as part of a community's free-choice learning infrastructure, a term that describes the resources available to the public for informal learning (Falk, 2001). Tour participants interested in direct encounters with animals include members of neighbouring communities, domestic tourists, and international tourists (Newsome, Moore & Dowling, 2013). Their needs vary from relaxing, socialising, personal reflection, or the opportunity to learn (Dierking, 1998; Weiler & Davis, 1993).

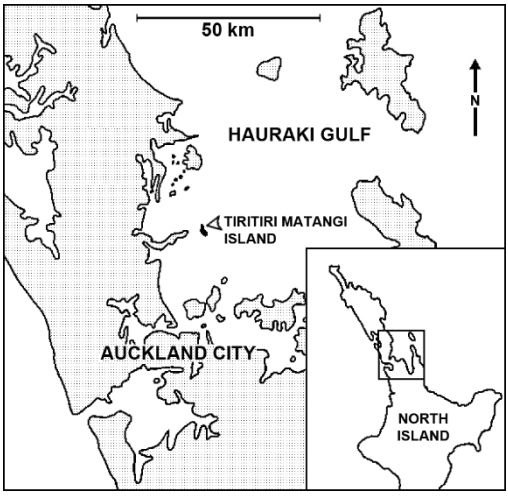
Intrinsically motivated learners are frequently more successful in achieving desired learning outcomes than learners who feel compelled to learn (Falk & Dierking, 2012). Hooper-Greenhill (1999a) highlighted that direct encounters with objects in museums facilitate opportunities to contextualise abstract ideas and experiences, trigger the recall of knowledge and memories, and elicit curiosity. Guided wildlife tours often incorporate information about animal species and their role in their ecological habitat that a person may deem relevant to their learning needs. Learning and the exchange of information have been identified as important elements in visitors' overall experience

during a wildlife tour (Forestell, 1993; Lück, 2015; Orams, 1995). Typically this has been in the form of an informal environmental education programme (Lück, 2015).

There has been scepticism expressed about the extent to which tourism can be changed and adapted to benefit the environment and host community, especially the extent to which tourists will base their consumption patterns on altruistic concerns (Fennell, 2008; Wheeller, 2003). However, tourism at community-based ecological restoration sites such as Tiritiri Matangi Scientific Reserve, New Zealand is recognised as a catalyst for developing community initiatives and enhancing the local biota (Campbell-Hunt, 2013; Galbraith, 2013; Higham & Lück, 2002; Orams, 2001).

While guided tours can act as a mechanism to support the conservation of a PA, the sustainability of such human interaction with its ecological communities is site specific (Newsome, Moore & Dowling, 2013; Weiler & Ham, 2001). A key characteristic of many terrestial PAs in New Zealand is that ecological restoration through human intervention is essential for their conservation (Butler, Lindsay, & Hunt, 2014; Campbell-Hunt, 2013). The ecology of New Zealand evolved with just three bat species as the only terrestial mammals. Bird species were the dominant land animals and filled many of the ecological niches normally associated with mammals such as apex predators (Attenborough, 1998). The arrival of Polynesian peoples and then colonization by the United Kingdom, caused the extinction of 41 endemic bird species by the twentieth century, and the classification of most other endemic bird species as endangered (Butler et al., 2014; Brown, Stephens, Peart and Fedder, 2015; Crosby, 1986).

The SoTM guiding programme provides a template for other community-based organisations throughout New Zealand who are involved in locally-based ecological restoration programmes (Butler et al., 2014; Robinson et al., 2013). Research has established that visitation to the island and the creation of tracks does not negatively impact the translocated fauna (Lindsay, Craig, & Low, 2008). Access to scientific reserves in New Zealand is normally determined on a case-by-case basis by official application to the Department of Conservation (DOC) (Butler et al., 2014; Galbraith, 2013; Rimmer, 2008; Robinson et al., 2013). The 'open' status of Tiritiri Matangi Scientific Reserve means that prescribed types of recreational behaviour are permissible without prior notification to DOC. Open access to Tiri, a 220 hectare-sized island, has provided the opportunity for community groups to make substantive contributions to the restoration of the site at an individual and community level (See Figure 1). Volunteers planted over 280,000 trees between 1984 to 1994. The networking between disparate groups of volunteers, DOC staff, and researchers such as the architects of the restoration project, John Craig and Neil Mitchell, inspired the formation of the Supporters of Tiritiri Matangi (SOTM) in 1988 (Rimmer, 2008).



Source: Galbraith (2013).

Figure 1. *Tiritiri Matangi Scientific Reserve, Hauraki Gulf in relation to Auckland and the North Island of New Zealand*

SOTM is a volunteer community-based organisation that, through a memorandum of understanding, jointly manages Tiri with DOC. SOTM is involved in both the day to day and strategic management of Tiri. It runs the guiding concession, the visitor centre and shop, and maintenance of tracks and most of the visitor-orientated facilities (Galbraith, 2013; Rimmer, 2008). Tiri has been cited as a sustainable model of ecotourism that creates positive outcomes for indigenous biota and the local community (Orams, 2001).

The Role of Guides on Wildlife Tours in Protected Areas

Study of the social relations in guided tours has focused on the roles of the guide in their mediation between visitors and community and resources where tours occur, especially how the authority of the guide is perceived and negotiated during a guided tour (Cetin & Yarcan, 2017; Cohen, 1985; Cohen, 2004; Cohen, Ifergan & Cohen, 2002; Weiler & Black, 2015). With wildlife tours in PAs, guides are either a part of a team who help facilitate the actual tour or are the sole representative of the agencies and organisations responsible for the management of the visitors (Moscardo et al., 2004). The roles that guides play on nature-based tours fall into three spheres. Tour management is where the focus of the guide is on organising and entertaining the group. Experience management involves the guide focusing on individual behaviour through acting as a group leader and a teacher. Finally resource management is where the guide acts as a motivator and interpreter in connecting the tourists to the ecological features of the host site (Weiler & Black, 2015).

These spheres have featured prominently in research findings on the roles of nature-based guided tours but a challenge with focusing specific roles is understanding the visitors' perspective: "Because of the difficulty of labelling a guide's roles in ways that distinguish one role from another, especially in the eyes of a visitor" (Weiler & Black, 2015, p. 26). A way forward may be focusing on the underlying social relations between guides and visitors that underpin the role of the guide in the learning that occurs on a tour.

Important facets involved in the social relations between guides and visitors on wildlife tours is the authority of the guides in terms of their knowledge of site and its resources (Moscardo et al., 2004; Orams et al., 2014, Weiler & Black, 2015). The providers of wildlife tours often have an educational agenda to ensure legally required behavioural standards during the tour are met, especially when in close proximity to wildlife. If such desired behavioural norms are unfamiliar to visitors, then these goals may not be achieved. These agendas often include a set of off-site actions that people can do to ensure the survival and well-being of wildlife.

According to Marton & Tsui (2004) "learning is always the acquired knowledge of something, and we should always keep in mind what that 'something' is" (p. 4). This can be a challenge for visitor attractions such as museums that utilise material objects such as weapons in relation to topics such as peace as individual visitors may be more focused on the aesthetics of the design or other aspects of the weapon itself (Hooper-Greenhill, 1999b). In wildlife tourism, the wildlife are the object of interest but the learning is often formed around intangible ideas such as conservation, biology or ecology (Forestell, 1993).

While the personality of the learner is intrinsically central to learning, research on the psychology of learning indicates external factors such as the physical world and social contacts play complementary roles (Falk & Dierking, 2012). Interaction with adult teachers or 'capable peers' increases the learning potential of children by creating a 'zone of proximal development' (Vygotsky, 1978). This zone represents "the distance between the actual development level as determined by independent problem solving and the level of potential development as determined by independent problem solving under adult guidance or in collaboration with more capable peers" (Vygotsky, 1978, p. 86).

The assistance of capable peers for adults in free-choice learning environments can allow them to learn at their own level but it requires a space where individual learning needs can be recognised or communicated (Czikszentmihalyi & Hermanson, 1999). For guided tours, the zone of proximal development suggests how the actions and behaviour of operators, guides and fellow visitors can inform the learning process of visitors during interpretive experiences (Dierking, 1998; Forestell, 1993).

Guides can model appropriate behavior on minimizing impacts on the wildlife and their habitat (Forestell & Kaufman, 2007). Guides can demonstrate appropriate types of behaviour such as staying on designated paths, retrieving litter, and not attempting to touch or feed wildlife. This modelling of behaviour can have a positive impact on a visitor's experience (Lück, 2003).

Research Design

The research focused on specific incidents of guide visitor interaction on tours (GVI) where the researcher was a participant observer. These incidents were explored through tour outcomes such as learning and personal insights as perceived from the viewpoint of visitors, guides and the researcher. Learning outcomes were defined as the learning that visitors perceived occurred from the tour experience based on their own self-assessment. An important constituent of learning is the venue where it occurs (Nuthall, 2004). For both the tour operators and the visitors of the tours observed there was no expectation of any formal behavioural assessments of learning outcomes of the tour such as written tests or monitoring of pro-environmental activities. Visitors' perceptions of their own learning outcomes were connected to phenomena that the relevant guide and researcher also had recollections of.

Personal insights are defined in previous research as a research participant's self-appreciation of the value of a tour based on how it stimulated their understanding or behaviour in an environmentally positive manner (Walker & Moscardo, 2014; Walker & Moscardo, 2016; Walker & Weiler, 2017). In the context of the research presented here, personal insights are the narratives constructed from the information that visitors bracketed with their own perceptions of learning such as what they cited as knowing before and what they perceived as new information and the source or processes they attributed to the accrual of new knowledge during GVI (Spring, 2016).

The overall aim of the research used in this article was to understand what visitors learnt in the context of observed GVI and the reflection of both guides and visitors. The data presented in this article was collected on volunteer-led bird watching tours of Supporters of Tiritiri Matangi (SOTM) on Tiritiri Matangi Scientific Reserve (Tiri), Auckland, New Zealand. Using narrative methods data was collected through participation in, and observation of, the tours and via in-depth semi-structured interviews with visitors and guides (Riessman, 2008). Five case studies were selected from fieldwork on 31 SOTM tours between October 2010 and May 2012. Each case study included in situ and reflective interviews with both visitors and guides.

The participants were given an alphabet letter and the moniker of Guide, Visitor or partner to delineate their role. For example, Visitor E and his wife, Partner E were

observed on the tour conducted by Guide E. Knowledge about the guided tour was produced during the research through agreement and recognition of difference with the participants about what occurred during the tour and the nature of the phenomena discussed. The inclusion of the perspective of visitors, guides and the researcher's observation of the actual tour in each of the case studies, intra-data comparisons between case studies and a four-stage approach to the thematic analysis established the trustworthiness of the data and facilitated clear interpretations.

Discussion of Results

The research found that learning was an important part of the experience sought by the visitors involved in the guided tours studied. Guide Visitor Interaction (GVI) plays an important and influential role in shaping visitors' experiences during wildlife tours. Participants often referred to the role of guides and others in facilitating memorable experiences. When visitors discussed learning outcomes there were both implicit and explicit references to GVI. Although these references were more often made during the in situ interviews (i.e. in their short-term recollections) they were often still a feature of visitors' recollections in their long-term reflective interviews over 10 months later (See Table 1).

While the research process focused on interviewing individual participants in the context of GVI, it allowed for participants to be interviewed in the presence of their social circle. An unintended consequence of this was insights into different facets of the social nature of free-choice learning during a tour. Visitors often discussed their interaction with the guide, what they chose to share, and what they learnt with reference to family, friends, strangers, staff or volunteers present on their tour. This suggests that a range of social relations were operating within any given tour group for each individual for the duration of the tour. Visitor C indicated there was a potential impediment for his family in socially accepting Guide C based on their first impressions of her. This problem, however, appeared to have been negotiated away through his family's social interaction with her:

> We quite liked Guide C. Originally my wife even made the point that she looked like she may be one of these; she was worried Guide C was going to be one of those "know it alls", you know? Fricking greenies which is, okay. I don't want to mean that in a derogatory way but just too much "know it all", [who might] talk down [to us]... But we all found her to be really believable and I think she had a good sound knowledge. So, she got our respect because of that (Visitor C, in situ interview)

Some visitors communicated an awareness of how their own conduct can impact on the social relations with the tour. Visitor A shared after the tour that she had been

sea sick during the boat trip and at the start of the tour she still needed to recover by staying seated and having a cigarette. Visitor A was conscious that she may have made a bad impression and wanted to indicate her willingness to participate in the tour:

> The guide has to assess in a very short amount of time, don't they? What their audience is, that's why they ask where you come from? Their actually probably listening to the tone of your voice, whether your making eye contact, whether you're interested. That's why at the beginning I was sitting down, that's cause I'm a lazy bird! But I noticed, she was having to turn cause she was trying to gauge me, so that's why I stood up and got in front of her to say 'no, I am interested, I'm just lazy and like to sit down'. (Visitor A, in situ interview, SoTM)

Table 1
Quotes from the in situ and reflection interviews about the educational nature of their tours and the role of the guides

Visitor A (SOTM) Day of tour	"[The guide] said quite a lot about the interrelations between the different types of birds of what they had there, between the grub-eating birds and the nectar-feeding ones. So, I remember quite a lot. Thinking back; it's very educational (Visitor A, in situ interview, SOTM).
Visitor A (SOTM) 10 months or more later	"And just knowing that it had all been, it was kind of like a private endeavour that had created this island which was quite, yeah, I think that was the most memorable thing about Tiritiri Matangi" (Visitor A, reflective interview, SOTM)
Visitor D (SOTM) Day of tour	"On a one to ten again, I think probably a ten, because I feel that he explained all the bird variety on the island really well, explained their eating habits, explained the vegetation and what they are feeding off, and history on the way in, and was very thorough". (Visitor D, in situ interview, SOTM)
Visitor D (SOTM) 10 months or more later	The tour leader was definitely knowledgeable and definitely excited in showing what he knew about the place and because he was a volunteer so obviously he had did his own research and through going to Tiri and I'm sure had learned just by observing and he was more than willing to share that with all of us and excited to do so. I'm a very visual person so just connecting that to the island. I can imagine still walking through the trails and landscapes (Visitor D, reflective interview, SOTM)
Visitor E (SOTM) Day of tour	"I mean, took a little while, you know, just to get your eye in to peering through all the branches and things but once you got your eye in, you know, I could spot things pretty easily. Initially he's pointing and I was thinking. 'What's he pointing at?' and then 'Aah, I've got it!'. You know, after that it got easier and easier as we went round really." (in situ interview, SOTM
Visitor E (SoTM) 10 months or more later	"The guide, for example, pointed out how, you know, to see, rather than just to look. I mean anyone can look but until he points out the little bird on the branch and there's somewhere buried in the bush and oh, God, I would never have seen that but gradually as you start going around you know, you get your 'eye in' and you learn to look, you know past the foliage and you can spot the birds and for me that was a huge difference because I'm sure if we, if these little critters remained quiet and you could just bumble along a path and peer left and right and not see anything." (reflective interview, SOTM

(Source: Spring, 2016)

Visitors' on the SOTM tours recalled that during the GVI, staff provided them with skills to observe targeted phenomena. For example, Visitor E related how Guide E helped him adjust to being able to observe birds between the trees. Visitor E felt that Guide E had an ability to see things that he could not initially see. In both his in situ and reflective interviews, Visitor E said the guide was able to orientate the visitor to observe things that the visitors would not have seen without the guide. The role of the guide in helping Visitor E to see the birds, an indication of the guide's knowledge and skills, was still a key idea in Visitor E's reflective interview, a year after the tour (See Table 1).

In the discussion about their interaction with guides and other staff on their tour, the visitors commonly referred to 'knowledge' and 'information'. The visitors appeared to use the two words interchangeably most of the time, although information provided by the guide was sometime qualified by its quality and this was not the case when visitors used the word knowledge. Visitor I became aware of a level of informal training provided to SOTM guides through GVI to determine if Guide I knew about John Craig and Neil Mitchell, the architects of Tiri's ecological restoration restoration plan:

> Obviously, [the guide] has met the both of them, and he told me that they come over once a year, they have like a guided tour for the guides. So, in a sense, any hard questions about the ecology and things like that, the guides can ask them, because they've got research knowledge about it. (Visitor I, in situ interview, SOTM)

As with Visitor C, Visitor I assumed that his guide held strong pro-environment beliefs and that these were also shared by other SOTM volunteers (See Table 4).

Visitors noted how guides created an atmosphere where they felt able to explore ideas with the guides, which in turn, facilitated the provision of information. The most common expression of this idea was that it stimulated questions for the visitors. Visitors often associated the reasons they asked certain questions with GVI. The excerpts from the fieldnotes of Visitor C's SOTM tour and the recollections of both Visitor C and Guide C based on a direct encounter with a North Island Saddleback (*Philesturnus carunculatus*) highlights the complex nature of GVI. The guide identifies the sound of a Saddleback that the group got to see. While the commentary of the guide is about visual features of the bird, Visitor C asks about the distribution of the species (See Table 2).

Table 2
Field notes recording GVI between Visitor C and Guide C about Saddlebacks (Philesturnus carunculatus), and the recollections of Visitor C and Guide C about a question Visitor C asked from their in situ interviews

Fieldnotes of Visitor C's tour:	**Guide C:** Sounds like we are hearing Saddleback (*Philesturnus carunculatus*). Kōkako (*Callaeas cinerea*) and Saddlebacks are members of the Wattlebird family. **Visitor C:** That's the one we want to see! **Guide C:** Funny bird [Saddleback]. In North Island; stripes of yellow are a feature of Saddlebacks. First feathers of juvenile birds on its back form it's saddle. First feathers on the back of juvenile South Island birds are different compared to adult South Island Saddlebacks. Juvenile South Island Saddlebacks were called the Jack Bird. Visitor C: Why don't we see Saddlebacks in areas outside protected areas [specific term used by Visitor C not recorded] Guide C: Saddlebacks don't fly well. From an evolutionary perspective, Saddlebacks are on the way to not flying…1116-1123 time of recording
Visitor C in situ interview	"I'm interested in birds. I hunt a lot and I've gone into the Ureweras [mountain range and national park in North Island, NZ]. Like bush where I'd expect to see this sort of thing [birdlife on Tiri]. You don't see that. So I'd never, I suppose I started to think 'Well, why don't ya?' So that's why I asked the question ['Why don't you see Saddlebacks outside protected areas?']. Because I've been in other protected areas, only two or three, but the one that stands out in my mind, where there's a heap of Saddlebacks and that's in the Queen Charlotte Sound [Protected Area, South Island]. And where I saw them was on another island like this. So I'm thinking, so if we see them here, why don't we see them anywhere else?" (Visitor C, in situ interview, SoTM)
Guide C, in situ interview:	"He asked 'why don't we see them on the main land?', and I don't know if it was that stage. I said that Saddlebacks (Philesturnus carunculatus) are not great flyers". (Guide C, in situ interview, SoTM)

(Source: Spring, 2016)

However, Visitors' perception of the composition of different social circles with the one tour group may impact on whether visitors ask questions or not. Visitor A was part of a tour group where at least three sets of visitors were strangers to each other while Visitor E's tour group consisted of one social circle of his friends and family. Visitor A restricted the amount of questions she wanted to ask because of her consideration of the needs of other visitors who were not part of her own social circle. This was not an issue that Visitor E had to consider. Ultimately, Visitor E felt that the number of questions he asked negatively impacted on his memory of the tour. While questions may indicate receptivity to learning, visitors' ability or inability to self-censor their contribution can make it difficult for a guide to observe what visitors actually want to learn about (See Table 3).

Table 3
Visitors' quotes about the nature, the stimulus or reluctance to ask questions on tours

Visitor A (SOTM)	Well there's whitey wood (*Melicytus ramiforus*) as well. I had heard of that of that so I kept shut, stum. Because other people have to have a [chance to speak], I didn't want to take over, asking silly questions (Visitor A; in situ interview, SOTM)
Visitor C (SOTM	Yes, that's why I asked the question: 'Why did they [Māori] let them [Pacific rats (*rattus exulans*), go?' Because you think, 'Well, if it's a rodent, why would you do it?' But like she [Guide C] said they were probably a good eating rodent as they were vegetarian, a form of protein. (Visitor C; in situ interview, SOTM
Visitor E (SOTM)	"Well he, in some ways; I don't know if he deliberately gave some information that… I guess he doesn't want to overload people with information so he would … give you just a basic understanding so we could have just gone around, not asking any questions at all, and still come out of it quite fully informed. Some areas, I thought 'That begs the question about this'." (in situ interview, SOTM)
Visitor E (SOTM	"I think for me, I was a victim of my own curiosity. I asked so many questions you end up with information overload, and at the time you think you will remember it, and obviously, you don't" (Visitor E, reflective interview, SOTM).

(Source: Spring, 2016)

In the process of attributing to guides the quality of having knowledge, the visitors indicated that they had their own processes of assessing whether the guides were knowledgeable by comparing the information provided by guides with their pre-existing knowledge. Visitors indicated that their knowledge not only came from the guide but also from other sources: "I mean, I'm only going by what the guide said and the few bits I've read" (Visitor A, in situ interview, SOTM).

There was an expectation that guides would be knowledgeable but what stood out for visitors about their guides was their intense personal interest in the topics they discussed. The volunteer status of SoTM guides appeared to help to establish the credibility of their knowledge. The voluntary nature of their work on Tiri was cited as evidence by visitors of the guides' enthusiasm and personal commitment for the island and its resources. Visitor I talked about the regularity of his guide's volunteering activities for SoTM, and, saw this as an indication of the guide's passion for the island. In her reflective interview, Visitor D had a perception that the guide was knowledgeable, and that this knowledge had derived from the guide's familiarity and own personal interest, as evidenced in his act of volunteering (See Table 4).

Table 4
Quotes from visitors about their perceptions of their guides and the project they volunteer for

Visitor C:	"Just gave us a bit of … enthusiasm, a passion for it, for the birds and the island." (reflective interview, SoTM)
Visitor D:	I'm just impressed with volunteers in general I think, because they donate a lot of their time, and he was very enthusiastic and was a wealth of information so I gained a lot of respect for him in that way (reflective interview, SoTM)
Partner E:	"The guide and the passion of people to give up their own time to make it happen…in a way it doesn't surprise me that people are so passionate about: (1) wanting to be involved in that and (2), wanting to share their knowledge and just joy that such a place has been created and that its being protected for everybody." (reflective interview, SoTM)
Visitor E:	"He [Guide E] was obviously very sort of passionate and dedicated person and he was also a very knowledgeable person and so he was able to make it very interesting and informative." (in situ interview, SoTM)
Visitor I:	"I think he does an excellent job. I mean, you saw a lot of groups, right, so they're all volunteers and all of them quite passionate about nature. They are probably very 'green' … they have a green mentality, and, I just appreciate there are many people in New Zealand who have a sincere, what's the word? Passion to restore New Zealand back to a bit of what it was." (in situ interview, SoTM)

(Source: Spring, 2016)

The findings indicate that visitors' self-perceptions of learning or the incorporation of new information with pre-existing knowledge often involved hearing non-elicited information from the guide. Also, the guides' response to their own or others' questions were commonly connected to what they perceived they learnt. Visitors recognised that guides facilitated interaction on a tour but visitors' perception of factors such as the size of the guided tour group and peoples' self-awareness of how they may impact on the experience of others also inhibited people from interacting with the guide and visitors outside of their personal social circle.

Assessment of Learning in Guided Tours and Social Relations

A finding of the research was that the actions and conversation of the guides conveyed credibility to visitors. Observed interaction between guides and visitors in the field notes and self-reported by visitors and guides indicates that existing social relations between members of the guided tour parties are a catalyst in the exchange and evaluation of information during the tour. The visitors' narratives revealed the visitors' perceptions of themselves as part of a distinct social circle. When discussing building rapport, visitors noted the views and ideas of members of their own social circle or the visitors' perceptions of that social circle in relation to the guide or tour group. The findings give support to the importance placed by visitors on the role of guides in the spheres of tour management, experience management and resource management. This highlights the importance of training nature-based guides in all these three areas to ensure sustainable outcomes on tours (Weiler & Black, 2015).

Another dimension of the social context of a tour is how visitors perceive the nature of the social relation between themselves and the tour guides. An educational element to a wildlife tour was an expected part of the tour for both guides and visitors but the nature of the learning outcomes is a very vague concept for most participants. The rules governing the social actions in a tour appear to include a sense of a shared commons where any individual can ask questions or share their knowledge. The opportunity for each visitor to contribute to the exchange of ideas on a tour exists but visitors may self-censor what they communicate due to social consideration such as the existence of more than one social circle within the tour group.

Guided tours contribute to outcomes that foster post- visit attitudes and behaviours but Weiler and Black (2015) note with caution the potential bias of self-reporting on the part of the visitors in many studies in respect to in respect to visitors off site behaviours before and after a tour. This makes it difficult to assess to what extent a guided tour may have reinforced existing pro-environmental behaviours rather than stimulated new ones (Weiler & Black, 2015). SOTM tours contribute successfully to raising or reinforcing visitor awareness but fostering ownership and stewardship goals are more difficult items to measure when researching tour outcomes.

Problematising the nature of the social relations within a tour group may facilitate a better understanding of how guides can play their role in resource management so that their visitors may consider a role in environmental stewardship. In theorising how social relations inform the distribution of resources in any given human social setting, Fiske (1992; Fiske & Haslam, 1997; Rai and Fiske, 2011) argued that humans use four mental models for most of our social interactions: Authority ranking, communal sharing, equality matching, and market pricing. In discussing how indirect speech acts corresponds to relationship negotiation, Pinker et al. (2008) posited that three of the four are historically shared by all cultures: Dominance (authority ranking), mutuality (communal sharing) and reciprocity (equality matching) while market pricing is a feature of industrial and post-industrial societies. Fiske's (1992) Relational Models Theory (RMT) was a response to an emphasis on the individual in social psychology as a way of understanding the importance of social interaction as an underlying structure in how people organise their lives. Through authority ranking, communal sharing, equality matching, and market pricing, humans "construct and construe relationships. This means that people's intentions to other people are essentially sociable and their social goals inherently relational" (Fiske, 1992, p.689).

Communal sharing (CS) relations involve a conception of a grouping of people who believe that a shared quality such as kinship ties binds them together, and that this bond facilitates the sharing of resources such as living spaces, food and transport.

Social roles are based around repetitive activities that create a sense of equivalence and commonality between the group members (Fiske, 1992; Rai & Fiske, 2011). The findings provide no insight into a CS sharing relationship informing the social exchange within specific tour groups researched. Their observations about the guides do indicate that visitors perceived a shared attribute between their tour guide and other members of SoTM in their dedication to the restoration and conservation of Tiritiri Matangi.

Authority ranking (AR) represents differentiating people within a group in terms of a defined hierarchical basis for determining authority when it comes to decision making or evaluating information connected to the sharing of resources; "AR allows us to know the relative position of individuals in a linear hierarchy" (Rai & Fiske, 2011, p.60). Social roles are based around the idea that, in certain situations, two people within a social grouping cannot outrank each other. When it comes to the safety of a ship at sea, the authority of the captain of a vessel supersedes that of any of the passengers even if one of them is the head of a sovereign state. The tour participants all conveyed a sense of recognising the leadership role of the guide when it came to the dissemination of information about Tiritiri Matangi phenomena on their guided tour. Their sharing of how they evaluated their tour-based learning and knowledge accrual suggests that the negotiating of such relationships within a tour group involves a recognition of shared and different values, a sense of mutual respect and a shared interest for certain phenomena. The RMT recognises that "in any complex relationship between two or more persons, individuals often employ multiple models at the same time to navigate different aspects of different social-relational interactions" (Rai & Fiske, 2011, p.60).

Equality matching (EM) relations is about maintaining a reciprocal balance between the members of the relevant group. Where there is a tacit acceptance of certain imbalances between people in an EM relationship, there is periodic revision of the distribution of resources shared. Both deliberate and accidental actions that change the equilibrium between the group members need to be assessed; "the idea is that each person is entitled to the same amount as each other person in the relationship, and that the direction and magnitude of an imbalance are meaningful" (Fiske, 1992, p. 691).

Market pricing relations involves the use of a metric such as money to compare items on a ratio scale that may otherwise be considered non-comparable (Rai & Fiske, 2011). Measuring the value of any service that provides an expectation of educational outcomes for its users is challenging. With the SoTM tours, learning and the accrual of new knowledge are items that all participants identified as tour outcomes but the informal nature of such learning creates a challenge in understanding any long-term benefits for the individual or others from such learning.

Free-choice Learning Careers

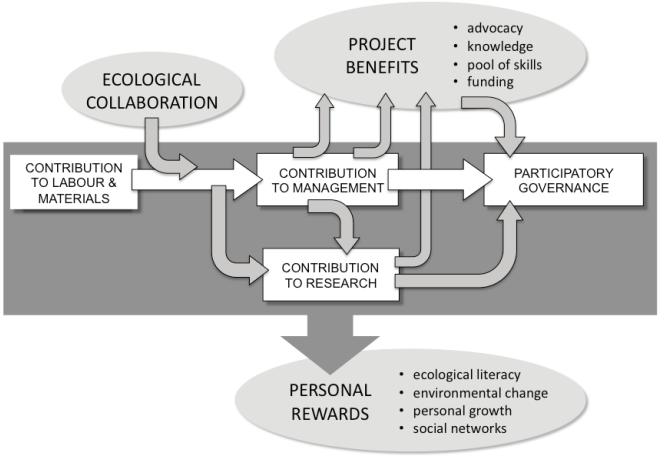
Falk and Dierking (2000) state that "learning is a dialogue between the individual and his or her environment through time" (p. 236). While formal educational achievement involves a form of external recognition, the milestones and benefits of free-choice learning at an individual or societal level are often very difficult to measure. In their discussion of the significance of leisure science learning in Los Angeles, California, Falk, Storksdieck and Dierking (2007) used the term "lifelong science learning" to invoke a sense of continuity in an individual's interest in science. A more universal term is "free-choice learning career" which can be defined as a sustained learning focus over time by an individual on a specific discipline, subject or activity.

Career, here, is in the sense of a vocation or a calling rather than a profession. In tourism research, Pearce used the term career to identify how both constant and ephemeral motivational factors affect a person's tourist behaviour over a period of time (Ross, 1998). A travel career suggests a sense of progression in each tourist's motivation for travel from inner to outer focused needs and that can be identified from their behaviour that over time becomes more altruistic in exchanges with destinations visited (Pearce, 2005). For a travel career to be operationalised as an empirical research model, past travel experience needs to be directly measured so that a discernible pattern in the psychological motives of a tourist, is demonstrably linked to changed patterns of behaviour over time (Ryan, 1998). While the idea of a career suggests that time is a quality that can provide opportunities for behaviour change, other studies suggest that the duration of the actual holiday can act as a constraint on change and a conduit for repeating past tourist behaviour (Ryan, 1998).

The free-choice learning career may culminate in following formal education paths that can provide external assessment of proficiency such as a tertiary education qualification. In a knowledge-based economy, learning is valued as a creator of economic capital. At a national level the development of learning infrastructure is an intrinsic platform for economic growth. A nation's well-being depends on its commitment to supporting institutions such as museums, libraries and visitor centres in protected areas as these represent the foundations of a knowledge-based economy (Falk, 2001; 2005). The value we place on those institutions and the learning they foster is often commensurate to what we value as necessary at a societal level: "Infrastructure investments help provide structures, create conditions, and develop capacity that are prerequisite to the functioning of daily life" (Falk, 2001, p. 11). Galbraith's (2013) model outlines the career path that many volunteers took from visitors to Tiri on a guided tour motivated to see rare bird species to becoming members of SOTM and committed to protecting a localized ecosystem (See Figure

2). A volunteer's career may start with guiding, track maintenance, beach clean ups, and culminate in monitoring specific bird species, as well as becoming involved in research and governance. Members of SOTM work collaboratively with researchers and DOC staff, and through this their understanding of individual species and the overall ecology of the island is enhanced:

> Public participation in research on Tiritiri Matangi is the result of increased ecological literacy and a willingness by managers and researchers to accept non-specialised contributions to research. Collaboration between experienced researchers and non-specialised volunteers is recognised as a mechanism to assure the accuracy and reliability of the field data collected. (Galbraith, 2013, P. 269)



Source: Galbraith (2013).

Figure 2. *Conceptual model of the 'evolution' of public participation in the ecological restoration of Tiritiri Matangi project showing benefits to the project and to volunteer participants*

Volunteers play a vital role in the conservation of many PAs in New Zealand. Many began their environmental stewardship activities through leisure activities. At SoTM, being a participant on a guided tour is often a significant milestone in the free-choice learning career in conservation for many of its volunteers. Through the work of its volunteer members, SOTM plays a pivotal role in the ecological restoration of the island. Public recreational opportunities such as birdwatching and guided wildlife tours in New Zealand Protected Areas were often the first activities that volunteers at a PA did before becoming involved in activities as diverse as guiding, planting, scientific monitoring, and the translocation of rare species from donor sites (Butler et al., 2014; Galbraith, 2013; Campbell-Hunt, 2013; Rimmer, 2008).

Limitations

Feasibility issues meant that the study of guide-visitor interaction in relation to the learning process of individual participants was limited to two research sites, and the data collected reduced to case studies to five guided tours from each site. Riessman (2008) in evaluating the strengths and weaknesses of utilising thematic analysis in relation to other methods with narrative inquiry noted its limitations in the areas of uniformity and the role of the researcher: "The investigators' role in constructing the narratives they can analyze tends to remain obscure" (Riessman, 2008, p. 76).

An important limitation was the potential bias in respect to language, culture, ethnicity and politics. The ability to communicate through a shared language may mask subtle cultural differences in respect to phenomena such as learning, curiosity and affect. English was a second language for some of the visitors and guides observed and interviewed during the field research. Of the five case studies selected all participants cited English as their first language.

Conclusion

The idiosyncratic nature of a free-choice learning career makes it difficult to assess learning outcomes from short duration activities such as wildlife tours. The individual circumstances of each visitor make it challenging to devise a universal framework through which to schematise the potential circumstances of all visitors when it comes to free-choice learning. A person's free-choice learning involves an ad-hoc collection of venues such as guided tours, museums, libraries and other venues. It is possible to learn from the experiences of volunteers whose involvement in the places they care for often started through a guided tour and then progressed into a role of stewardship (Galbraith, 2013). The concept of a free-choice learning career can aid in researching learning and behavioural change for guided tour participants if it is combined with research about specific sites such as Tiritiri Matangi and overall subject matter such as conservation or indigenous wildlife.

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The Concept of Low-Cost Airline Transportation: Definition and Meaning

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Abstract

The purpose of this study is to measure the quality perception of in-flight services for the passengers. For that purpose, the service quality performances of the two biggest Turkish low-cost airlines were evaluated within the scope of the study. The study was designed quantitatively, and the survey technique was used to collect data. The data was obtained with convenient sampling method by involving 608 participants using the package program. In the analysis, factor, frequency and reliability analysis, t-test, and oneway ANOVA tests were used. According to the results of the study, both of the Turkish low-cost airlines have high service quality scores. Another conclusion of the study is that the demographic differences are not a determinant in airline service quality perception.

Keywords

Service Quality • In-flight Services • Low-cost Airlines • Servperf

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Introduction

With the increasing importance of service enterprises and their share in the economy, quality service provision has become more considerable in terms of businesses, and in the literature, there have been numerous studies on increasing, improving, and measuring service quality. Tourism has a labor-intensive structure. In 2018, Turkey had approximately 15.8 million people working for the service industry. This ratio was equal to 54.9% of the total active domestic labor force. According to the Turkish Statistics Institute (TUIK) data, total tourism income of Turkey is approximately 29 billion USD (TUIK, 2019). High quality of service is crucial for the tourism industry and its sub-sectors, in terms of ensuring competitiveness and sustainability. The characteristics of an air travel (food and beverage services, entertainment systems, comfort, etc.) are similar to accommodation. In this context, it can be said that the quality of service in air transportation is as important as it is in accommodation sector. The main purpose of cabin services is to meet the basic needs of passengers, such as food and beverages, and to make the journey enjoyable for them. This is also one of the major marketing elements of airlines. Cabin service incorporate many factors, such as food and drink offered on board, TV and video display, internet access, entertainment systems, seat width and knee distance, aircraft cleaning, attitudes of the cabin crew, and materials placed on the toilet.

The main objective of this study is to evaluate perceived service quality of low-cost airlines. It is thought that the study explore whether passenger satisfaction may be achieved with low-cost services. As a result of the literature review, it is seen that previous service quality studies were conducted in the form of a general quality assessment by airline companies. Therefore, there is a gap in the literature at that point. This study which in-flight services is evaluated aims to make a contribution to the current literature.

Literature Review

Service Concept, Definition, and Importance

Service is an activity carried out by an individual or an organization for the benefit of another individual or organization (Altan & Atan, 2004). According to Zengin and Erdal (2000), "serving" is an abstract activity that is offered for sale at a certain price in order to meet people's needs which does not require any proprietorship but provides benefit and gives satisfaction. Additionally, another definition of service concept is behavior; effort or action (Verma, 2012). Therefore, service can be described as paid or free of charge actions which are fulfilled for the benefit of individuals or organizations and which do not provide any tangible product but still satisfy the customers. On the other hand, services may also include physical products (Alrawadieh et al., 2019; Suer, 2014).

Demand for the service industry is directly proportionate to the level of urbanization, social life, economy, and education. High standards of living may lead to an increase in the customers' expectations towards goods and services (Ardic & Sadaklioglu, 2009).

Because of the intensely competitive environment which has been existing today, executives must develop strategies to keep their current customers. These strategies should be based on the factors that determine the customers' choice of the firm. Customer satisfaction ensures customer preferences are preserved (Garga and Bambale, 2016). It is stated that the services should be distinguished from the products because of their specific features, as these features influence marketing services (Bhattacharjee 2006, Altunisik & Karatas 2015).

Services cannot be touched, smelled, or tasted. The customers do not have any products after buying a service. For instance, an airline company does not produce any tangible product. The technical and non-technical services are for the benefit of customers (Verma, 2012). Physical products may contain services, and the services may contain physical products (Suer, 2014). Services are intangible elements (Bhattacharjee, 2006), and this feature limits the promotion and advertising activities of services (Altunisik & Karatas, 2015). Since services are intangible elements, it would be difficult for an operator to understand how consumers perceive services and quality (Altan & Atan, 2004). One of the most important features of a service is that it cannot be stocked. Balancing the supply and demand for services is equally important and difficult. The low occupancy rate and overbooking concept are natural consequences of being perishable. In addition, product recalling is not possible in the service sector (Altunisik & Karatas, 2015).

Service enterprises must develop "right the first time" principle in an applicable way since there would be no second chance when things do not go well. Each service experience is specific, and there is no rehearsal, no repayment. For example, there is no refund for an unsatisfied night at the hotel (Verma, 2012).

The existence of the human element in service production brings along the inevitability of mistakes to the table. On the other hand, this feature emphasizes that services provided can vary in terms of quality and standardization (Zengin & Erdal, 2000) Unlike physical products, the output of services are not stable. Offering a standard service is rather difficult. Even if customers receive the same service from the same place at the same time, their evaluations may be different. For example, the efficiency of two visits for the same doctor may be different (Verma, 2012). In service, production and consumption are simultaneous (De Esteban et al., 2015).

Services have certain attributes that distinguish them from physical goods. Physical assets can be traded, received, sold, transferred, stored, and kept for use,

at different times. However, services do not have the same characteristics (Gumus & Tutuncu, 2012). Consumers benefit from many tangible clues, such as resilience, label, appearance, and packaging, to evaluate the quality when purchasing a good. On the other hand, the quality assessment for service procurement is usually limited to the physical condition, equipment, personnel, and place where the service is being provided (Parasuraman, Zeithaml, & Berry, 1985).

A customer's satisfaction with a product occurs when the product is used or consumed after purchase. However, service enterprises' satisfaction level with a product directly occurs during the production of specified service. In this case, the first determining factor is the quality of the service personnel and the service that personnel provides (Kilic & Eleren, 2009). The evaluation of the consumers' service quality perceptions is difficult due to the variability of the service characteristics (Demiciftci et al., 2017; Murray & Schlacter, 1990).

Product quality can be directly determined by technological examinations, statistical control methods, and numerical data in production enterprises, but measurement and control of service quality are not that easy (Kilic & Eleren, 2009). Moreover, problems that occur in service providers are generally subjective. These kinds of problems are not often solvable with general solutions, such as changing the product parts or production lines in manufacturing. In the case of enterprises that offer products and services in general, the problem arises in the services (Verma, 2012).

Quality of Service Concept

Service quality can be defined as meeting the needs of customers in the best way (Kocoglu & Aksoy, 2012). The reasons why the concepts of service quality gain importance can be listed as that the success of enterprises is directly proportional to providing quality products and services, the desire to increase market shares by increasing the quality of service provided, the desire to achieve higher profitability, the desire to create loyalty in customers, and etc. (Kilic & Eleren, 2009). Service quality, especially for service enterprises, has been more and more important day by day (Pekkaya & Akilli, 2013).

In order to manage service quality effectively, it is necessary to understand the concepts of satisfaction, quality, and value. Although these concepts are described as intangible, they play an important role in future purchasing decisions (Rust and Oliver, 1994) Since its intangible nature, it is difficult to define the quality of service. The definition of quality varies from person to person (Brown et al., 1991). In addition, both cultural and personal values have an impact on perceived service quality (Ladhari, Pons, Bressolles, & Zins , 2011). In the tourism sector, where the

competition is intense, service providers try to increase their service qualities to meet constantly changing customer expectations (Guven & Celik, 2012).

Various methods are available to measure perceived service quality. The most widely accepted ones are the *Servqual method*, which was found by Parasuraman, Zeithaml, and Berry (1985), and Cronin and Taylor's (1994). *Servperf method* was introduced via a critical review of Servqual. It is based on the differences between consumers' expectations and the perceived service quality. According to this model, the difference between perceived and expected service quality is the determinant of service quality. On the other hand, the *Servperf method* uses a performance-based evaluation and does not make an expectation assessment. This method argues that there is no need to compute the differences between the expectation on a received service and the perception of the quality of service. According to the *Servperf method* the expectation score is always the highest value for a costumer.

The Concept of Airway Transportation, Definition, and Importance

Air transport enterprises are companies that carry cargo or passengers for a fee through a certain line of air vehicles or carry out these actions with non-commercial activities (Directorate General of Sivil Aviation [DGCA], 2016). Commercial air transport is generally defined as leasing an aircraft or transporting passengers, cargo, or mail for a fee (The International Civil Aviation Organization [ICAO], 2016). Furthermore, an airline ticket is a significant part of travel expenditure (Cetin et al., 2016).

Presently, air travel is one of the safest means of transportation. In 2014, according to The International Air Transport Association (IATA) statistics, 38 million flights were made across the world and 3.3 billion passengers were carried. A total of 73 accidents occurred and 641 people lost their lives. According to these statistics, the likelihood of the occurrence of a fatal accident in air transport is about 1:3,166,666 (IATA, 2017). In Turkey, air travel has been a growing sector since 2000. The general passenger profile has changed to include different groups, ie, passengers who benefit from airline services are not only ones from the high-income group (Aydin & Yildirim, 2012).

In the aviation industry, it has become more important for managers of airline companies to get an idea of customers' perceptions of company brands, their service qualities, price levels, and other issues (Caber, 2018). It is crucial for airline operators to provide high-quality service to passengers by focusing on customer satisfaction. By doing so, they can maintain current customers and gain new ones and as a result, they can become able to compete with rivals (Kazancoglu, 2011). Price and quality of service are the primary weapons of airlines in competition. Airline companies understand that competing only for the price is not sustainable and does not enable

them to win customers in the long term and. The competitive advantage of airline companies depends on the high degree of service perceived by customers (Chen, Tseng, & Lin 2011). Thus, recognizing the preferences of each airlines' customer is a very important matter for managers. Airline management which provides and maintains a high quality of service can be successful (Hatipoglu & Isik, 2015).

Passengers spend more time on the flight than they usually spend at the airport. Airline companies should be closely interested in in-flight services which they offer to satisfy their customers/passengers. (Chen et al., 2011). Companies should pay attention to personnel who interact with customers, regardless of which business model they use (Forgas, Moliner, Sanchez, & Palau , 2010).

Airline Business Models

Within the airline industry, where intense competition conditions exist, firms have tried to compete using business models with similar and very limited differences for many years (Tasci & Yalcinkaya, 2015). Airline companies operate with different business models by making evaluations on geography, target groups, and etc. to be able to compete, ensure sustainability and make a profit. These business models are outlined below.

Traditional Airline Model

The traditional airline model is basically derived from the services of countries' flag carrier airlines and their derivatives. The business model of a traditional airline can be explained as follows (Cento, 2008):

- ✓ Basic Business: Passenger, cargo, maintenance.
- ✓ Central and Intermediate Networks: Connecting to intermediate networks considering the demand and optimization of the central base.
- ✓ Global Player: Domestic-international routes and intercontinental flights from central bases and flights to almost every continent.
- ✓ Alliance: No airline alone can truly be a global airline. For this reason, they need partners to connect them to the whole world.
- ✓ Vertical Product Differences: Land-flight, electronic services, and travel rules that can address all possible markets.
- ✓ Customer Relationship Management: All traditional airlines have a loyalty program that will connect their customers to them.

Low-Cost Airline Model

Low-cost air travel or air transportation is often known as discounted or cheap airline with no free catering. In low-cost airlines, generally, seat capacity is up to 200

people, a single-type aircraft operates and ticket prices are lower in comparison with many traditional airlines (Baker, 2013). Low-cost airlines fundamentally benefit from the regulations in the national airline market and international liberal agreements (Bjelicic, 2007).

In the low-cost airline model, airline operators prefer secondary airports due to the contracts that cause significant reductions in their revenues (Francis, Fidato, & Humphreys, 2003). The emergence of low-cost airlines has been a major influence on the civil aviation market. Some passengers continue to use traditional airlines while others have opted for low-cost airlines (Forgas et al., 2010).

Low-cost airlines are focused on generating non-ticket revenues. The food and beverages sold in flights constitute a significant part of their revenues. Commissions, such as extra luggage fees, travel insurance, and hotel and car rental services also have importance in terms of non-ticket revenue (Doganis, 2006). Price and service quality in low-cost airlines are the key to customer satisfaction (Forgas et al.,2010).

Charter Carrier Model

Although it is sometimes a business model which small enterprises or business groups use to reach resort hotels, historic towns, or cruise ships waiting for them, charter air transport is generally offered in conjunction with accommodation and other services in a holiday package of tour operators (Cento, 2008).

Regional Carrier Model

The regional carrier model can often be defined as scheduled and unscheduled flights through smaller planes, usually between transfer centers and small settlements (Sarilgan, 2011).

Low-Cost Airline Business Concept

Low-cost airline operators have competitive advantages in many countries due to the low tariffs compared to traditional airline operators. The needs and expectations of all customers are not the same (Kim & Lee, 2011). So low-cost airlines have different package policies even among themselves. For example, West Jet offers simple snacks and beverages, but at the same time, it does not allow seat selection during online check-in (Gillen & Morrison, 2003).

Although low-cost airlines make cuts with the costs from services, they cannot reduce costs on safety issues. While the quality of service is a significant issue, safety is the first priority for all airline companies, both traditional and low-cost. (Rhoden, Ralston, & Ineson, 2008).

There are some features that distinguish the low-cost airline companies from the traditional ones. These features are the low-cost structures, the use of single type of airplanes, the use of uniforms in airplanes, the use of secondary airports, no service differences such as "business class" in the cabin, paid seat selection, no customer loyalty program, and no unionization.

However, a low-cost airline does not necessarily have all of these features. Conditions in a country such as competition, business policy, or legal legislation may lead to differences in low-cost policies. According to some studies (Belobaba, Odoni, & Barnhart ., 2016; Chiou & Chen, 2010; Gillen & Lall, 2004; Gillen & Morrison, 2003), the key features of low-cost airline operations include:

- ✓ Low Price Structure: Low price strategy is a top priority for the low-cost airline companies to compete. Providing high service quality without offering low prices may not increase the number of passengers.
- ✓ Using Single Type Aircraft: Low-cost airlines aim to reduce maintenance, spare parts, and crew training costs by using a single type of aircraft.
- ✓ Use of Secondary Airports: Airports take their natural value from their location. However, in order to be among the preferences of an airline, they must have an advantageous position because of the large economy, the dense population, or other factors that attract passengers. Low-cost airlines require less airport service than traditional airlines. Due to their limited needs, low-cost airlines prefer secondary or regional airports. As a result, they have a competitive advantage over traditional airlines with low airport fees, a shorter ground time between flights, less air traffic, and, therefore, less delay (European Low Fares Airline Association [ELFAA]., 2016).
- ✓ Cabin Services: Low-cost airlines offer one type of cabin with no business class, first-class, or premium class. In this way, no extra costs arise due to service differences. They also try to get the lowest cost by not offering free catering and keeping the knee distance between seats at the minimum limit.
- ✓ No seat selection: The low-cost airlines aim to reduce the cost of transactions and services at the airport by not offering seat selection and not issuing boarding passes.
- ✓ Direct Ticket Sales and Reservation: Unlike traditional airline companies, they do ticket sales directly via telephone or internet instead of ticket sales agencies. Thus, ticket sales costs can be minimized (ELFAA, 2016).
- ✓ No Customer Loyalty Program: By not using customer loyalty programs, the costs of operating expenses and awards are avoided.
- ✓ No Union and a Lower Wage Policy: Lower paid staff can be employed because of the lack of union activity in low-cost airlines.
- ✓ Nonstop Flights: Low-cost airlines avoid point-to-point travel costs by arranging point-to-point nonstop flights.

Although these concepts are general features of low-cost airlines, they are adopting these to suit them due to differences in country legislation and market characteristics.

Methodology

The aim of the study is to determine service quality performances of the low-cost airlines operating in Turkey and to reveal the level of competition in the country. The target population of the study consists of passengers who have had flight experience through low-cost airline companies in Turkey. In 2016, the two biggest airlines in Turkey carried approximately 36 million passengers on domestic and international flights. 15 million passengers were transported in international flights. However, this number includes multiple flights. Because airline companies only show the number of tickets purchased in their statistics, there is no information available on the number of actual passengers. Moreover, it is not possible to determine how many of these passengers were Turkish.

The surveys were distributed and collected as online and hard copies between 02 March and 19 April 2017. Social media and forum sites were used for online surveys. Convenient sampling methods were used for the study.

In the study, the data was gathered from 623 participants by the survey method, but later, 15 forms were eliminated due to some missing values. At the end, 608 forms were used for analysis.

This study is designed as quantitative research. SPSS was used as the statistical analysis program for the data analysis. Reliability analysis, frequency analysis, independent bivariate t-test, and one-way ANOVA tests were applied in the package program, and the findings were presented in tabular form.

Design of the Survey

According to Jain et al., (2004) and Bulbul et al., (2008), in service quality studies of airline companies, Servperf scale studies were more explicative than Servqual scale.

Parasuraman et al. (1988) used the same proposals as the Servqual service quality scale, and Cronin et al. (1994) used the performance-based Servperf scale. In other words, only questions of perception are given on the scale. Questions aimed at measuring expectations were removed from the scale. The Turkish proposals of the scale were taken from the articles which had previously been studied with the Servqual / Servperf scales and were designed to be adapted to the in-flight services. The questions that are considered to measure the dimensions of service quality are as follows:

1,2,3,4 : Tangibles (Yildiz & Erdil, 2013)
5,6,7,8,9 : Reliability (Okumus & Asil., 2007)
10, 11, 12, 13 : Responsiveness (Okumus & Asil., 2007)
14, 15, 16, 17 : Assurance (Pekkaya & Akilliibik., 2013)
18, 19, 20, 21, 22 : Empathy (Ibik, 2006)

The scale was prepared using a 7-point Likert scale based on the recommendations of Parasuraman et al. (1988) and Pekkaya et al., (2013). The scale in both cases was from 1- strongly disagree to 7- strongly agree. No expression assignments have been made to 2,3,4,5, or 6. Weighted Servperf / Servqual was used on the original scale. However, in this study, the weighting could not be done due to a large number of incorrect data entries in the online surveys. The most useful SERVPERF/ SERVQUAL's service quality dimensions which include 22-items were used. These items are as follows:

1. It has modern-looking aircraft.
2. The physical means are attractive (cabin, magazine).
3. Cabin crew has a neat and professional appearance.
4. The catering materials offered during the flight are of high quality.
5. Carry out the services when they are committed.
6. The services are fulfilled as promised.
7. It is a reliable airline.
8. Keeps the passenger and service records properly.
9. Always works to provide faultless service to passengers.
10. Cabin crew quickly meets passenger requests.
11. Cabin crew gives satisfactory answers to passenger problems.
12. Cabin crew is eager to help passengers.
13. Cabin crew is never too busy to meet passengers' requests.
14. Passengers rely on cabin crew.
15. Passengers feel safe in payment transactions made by cabin crew.
16. Cabin crew is polite to passengers.
17. The cabin crew has the information to answer the questions of the passengers.
18. Cabin crew understands the individual needs of passengers.
19. Cabin crew shows individual attention to passengers.
20. The cabin crew gives passengers personal attention.
21. The cabin crew adjusts the service start time according to the needs of the passengers.
22. Cabin crew is receptive to personal requests by passengers.

Results

Demographic Results

The data were obtained from 608 participants. Passengers were classified according to their characteristics such as gender, age, marital status, education, income group, travel frequency, and recommendation status of the airline. The participants consisted of 81.9% male and 18.1% female. The majority of participants (%62,3) were between 20-29 years old. The majority of the participants (%60,7) have a bachelor's or master's degree. 33% of the participants' monthly income was 1500 TL and below. With regard to flight frequency, there is a distribution that can be considered as balanced. 73,8% of participants recommend their favorite airline to others.

Table 1
Demographic Results and Recommend Status

		(N=608)	
		N	**%**
Gender	Male	498	81,9
	Female	110	18,1
Age	0-19	73	12
	20-24	233	38,3
	25-29	146	24
	30-34	89	14,6
	Older than 35	67	11
Marital Status	Married	159	26,2
	Single	449	73,8
Education	Collage and below	192	31,6
	High School	47	7,7
	Bachelor's	279	45,9
	Master or higher	90	14,9
Income	0-1500TL	202	33,2
	1501-2500TL	113	18,6
	2501-3500 TL	129	21,2
	3501-4500 TL	71	11,7
	Higher than 4501TL	93	15,3
Travel Frequency	Once in a month	155	25,5
	Once in 3 months	183	30,1
	Once in 6 months	150	24,7
	Once in a year	120	19,7
Recommend Status	Yes	449	73,8
	No	159	26,2

Reliability Results

Reliability Test Result

*T*he results of the reliability test are shown Table 2 and Table 3. In this study, Cronbach's Alpha value was 0.942. Also, 5 main dimensions of service quality's Cronbach's Alpha values were analyzed. Cronbach's Alpha was found to be 0.724 for *"Tangibles"*, 0.878 for *"Reliability"*, 0.871 for *"Responsiveness"*, 0.876 for *"Assurance"* and 0.877 for *"Empathy"*.

Table 2
Reliability Test Result

N	Number of Items	Cronbach's Alpha
608	22	0,942

Table 3
Reliability Results for Service Quality Dimensions

Dimensions	N	Number of Items	Cronbach's Alpha
Tangibles	608	4	0,724
Reliability	608	5	0,878
Responsiveness	608	4	0,871
Assurance	608	4	0,876
Empathy	608	5	0,877

Factor Analysis

The factor analysis of the scale is shown in Table 4. In the analysis, the KMO value was found as 0.946 and the Barlett Test value was found as 8596.113. The KMO value is between 0.90 and 1.00, which means that the sampling adequacy is very good for factor analysis (Alpar, 2017: 268). The KMO value and the meaningful presence of the Barlett Test mean that the scale is suitable for the factor analysis. The Direct Oblimin method was used for rotation due to the presence of correlation between factors. The factor analysis results of the scale were similar to Parasuraman et al.'s (1991) analysis because of the high correlation between the factors and the fact that the sub-dimensions could be perceived by the participants in different factors. Participants thought that the third proposal (Cabin crew has a neat and professional appearance) was under the dimension of responsiveness, but this question was not eliminated by the fact that this was a physical feature. The 4th proposal (The catering materials offered during the flight are of high quality) and the 18th proposal (Cabin crew understands the personal needs of passengers) were removed from the data set.

Table 4
Factor Analysis

Dimensions	Factor 1	Factor 2	Factor 3	Factor 4
Tangibles				
Q1				0,854
Q2				0,803
Q3	0,546			0,441
Q4		0,551		0,331
Reliability				
Q5		0,906		
Q6		0,804		
Q7		0,582		
Q8		0,572		
Q9		0,722		
Responsiveness				
Q10	0,588			
Q11	0,546			
Q12	0,666			
Q13	0,651			
Assurance				
Q14	0,700			
Q15	0,716			
Q16	0,861			
Q17	0,829			
Empathy				
Q18	0,444		0,539	
Q19			0,798	
Q20			0,764	
Q21			0,768	
Q22			0,763	

n:608 KMO=0,946

Bartlett's Sph X^2: 8596,113; p: 0,000

Total Variance Explained: %67,576 Eigenvalue: 1

Table 5 shows the correlation between service quality scale dimensions. These five dimensions have a moderate and high correlation with each other. Specifically, assurance and responsiveness have a high correlation of dimensions (0,800).

Table 5
Correlation Analysis

Dimensions	*Tangibles*	*Reliability*	*Responsiveness*	*Assurance*	*Empathy*
Tangibles	*1*				
Reliability	*0,602*	*1*			
Responsiveness	*0,556*	*0,663*	*1*		
Assurance	*0,487*	*0,615*	*0,800*	*1*	
Empathy	*0,514*	*0,514*	*0,708*	*0,655*	*1*

Descriptive Statics

The average answers' scores given by participants are shown in Table 6. According to the results of the analysis, the highest average score was given to *"Assurance"* (5,37) and the lowest score was given to *"Empathy.* Another result of the analysis is that all the items' scores were higher than "4.00" which is the middle point of the scale.

Table 6
Descriptive Statics

	N	Mean	Std. Deviation
Tangibles	**608**	**4,59**	**1,19**
Q1	608	4,66	1,50
Q2	608	4,07	1,54
Q3	608	5,51	1,31
Reliability	**608**	**4,81**	**1,32**
Q5	608	4,47	1,74
Q6	608	4,91	1,57
Q7	608	5,28	1,45
Q8	608	4,67	1,54
Q9	608	4,62	1,54
Responsiveness	**608**	**5,03**	**1,24**
Q10	608	5,01	1,40
Q11	608	4,96	1,44
Q12	608	5,07	1,44
Q13	608	4,97	1,43
Assurance	**608**	**5,37**	**1,18**
Q14	608	5,18	1,32
Q15	608	5,16	1,46
Q16	608	5,64	1,32
Q17	608	5,40	1,33
Empathy	**608**	**4,45**	**1,30**
Q19	608	4,40	1,55
Q20	608	4,10	1,58
Q21	608	4,08	1,66
Q22	608	4,74	1,47

A T-test was performed to examine the relationship between the dimensions of service quality and gender, and the results of the analysis are shown in Table 7. According to the results, there is no significant difference in all 5 dimensions between genders.

Table 7
Results of T Test

		t	df	Sig.(2-tailed)
Tangibles	Equal variances assumed	0,706	606	0,480
Reliability	Equal variances assumed	0,038	606	0,969
Responsiveness	Equal variances assumed	0,201	606	0,841
Assurance	Equal variances assumed	0,063	606	0,950
Empathy	Equal variances assumed	0,204	606	0,838

The one-way ANOVA test was performed to examine the relationship between the dimensions of service quality and income, and the results of the analysis are shown in Table 8. According to the results, there is no significant difference in all 5 dimensions between income groups.

Table 8
Results of Oneway Anova Test

	Sum of Squares	*df*	*Mean Square*	*F*	*P*
D1 Between Groups	*4,010*	*4*	*1,002*	*0,698*	*0,594*
Within Groups	*866,115*	*603*	*1,436*		
Total	*870,125*	*607*			
D2 Between Groups	*13,860*	*4*	*3,420*	*1,969*	*0,980*
Within Groups	*1047,135*	*603*	*1,737*		
Total	*1060,815*	*607*			
D3 Between Groups	*11,720*	*4*	*2,930*	*1,892*	*0,110*
Within Groups	*933,616*	*603*	*1,548*		
Total	*945,336*	*607*			
D4 Between Groups	*4,828*	*4*	*1,207*	*0,864*	*0,485*
Within Groups	*842,657*	*603*	*1,397*		
Total	*847,485*	*607*			
D5 Between Groups	*3,80*	*4*	*0,955*	*0,558*	*0,693*
Within Groups	*1032,374*	*603*	*1,712*		
Total	*1036,193*	*607*			

Conclusion

Air transport is one of the most competitive sectors today and for this reason, airline operators should take measures to protect and improve their current market. The brand image is crucial for an airline to enhance customer loyalty, and the quality of service has great significance for the brand image. Kazanoglu, (2011) concluded that service quality is significant in terms of creating customer loyalty.

According to Vieira et al. (2019), the number of tourist increased dramatically as different alternatives emerged for visitors with the entrance of low-cost airlines to the market. In Turkey, low-cost airlines offer generally similar services (full economy class, no in-flight entertainment systems, short distances between seats and etc.). Therefore, the differences between the services offered may lead to an increased perception of service quality.

In general, it can be said that Turkish low-cost airlines are successful in terms of service quality when it is considered that the 7 points Likert scale was used in the study. Considering the service limits of low-cost airlines, it can be said that high customer satisfaction arises from low expectations. According to Parasuraman et al., (1985) quality service consists of the positive difference between perception and expectation.

One of the findings is that there is a middle and high-level correlation between all service quality dimensions. The results of the study have a similarity with the results

of some other researches on the quality of service (Brady & Cronin., 2001; Cronin & Taylor, 1994).

Another finding of this study is showing that the demographic characteristics of the participants such as gender, income, and etc. do not make a significant difference in perception of service quality dimensions. These findings are similar to the results that Aydin and Yildirim, (2012) reached. Nevertheless, there are some other studies showing that people who prefer low-cost airlines have different demographic characteristics in comparison with the ones who prefer other business models (Vieira et al., 2019).

The data of the study were obtained from social platforms. Therefore, the demographic characteristics of the participants such as age, gender, income, and marital status were not balanced. Moreover, although there have been four airlines operating in Turkey, the scope of the study is limited to two airlines which are low-cost ones.

Both airlines within the scope of the study, mainly manage their operations at Istanbul Sabiha Gokcen Airport. Since factors such as the location, flight time, etc. may affect customers' airline preferences, airline companies must show flexibility on services in order to satisfy their customers who have different demographic characteristics.. At that point, it may be rewarding for airline companies to conduct studies to gain insight into the expectations of different demographic groups.

In addition, only Turkish passengers were involved in the study. Measuring the perceived service quality of international passengers may be important for understanding the international competitive power of airlines in Turkey.

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Ignition. (1989). In *Oxford English online dictionary* (2nd ed.). Retrieved from http://dictionary.oed.com

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