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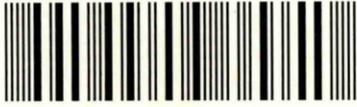
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Destination Benchmarking:
Facilities, Customer Satisfaction and Levels of Tourist Expenditure

Metin Kozak

A Thesis submitted in partial fulfilment of the requirements for
the degree of Doctor of Philosophy

October 2000

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level 1

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Abstract

An extensive review of past benchmarking literature showed that there have been a substantial number of both conceptual and empirical attempts to formulate a benchmarking approach, particularly in the manufacturing industry. However, there has been limited investigation and application of benchmarking in tourism and particularly in tourist destinations. The aim of this research is to further develop the concept of benchmarking for application within tourist destinations and to evaluate its potential impact on destination performance.

A holistic model for destination benchmarking was developed using the three main types of benchmark: internal, external and generic. Internal benchmarking aimed at improving a destination's internal performance by evaluating quantitative and qualitative measures. External benchmarking used tourist motivation, satisfaction and expenditure scores to investigate how one destination may perform better than another. Generic benchmarking aimed at evaluating and improving a destination's performance using quality and eco-label standards.

This study developed four hypotheses to test the possible measures and methods to be used in carrying out destination benchmarking research and investigate how cross-cultural differences between tourists and between destinations might influence its formulation and application. These hypotheses and the model were tested utilising both primary and secondary data collection methods. The primary data was collected from eight different groups of British and German tourists visiting Mallorca and Turkey in the summer of 1998 (n=2,582). Findings were analysed using content analysis and a series of statistical procedures such as chi-square, mean difference (t-test), factor analysis and multiple regression. Personal observations were also recorded. The secondary data included statistical figures on tourism in Mallorca and Turkey.

This research provides a discussion of findings and their implications for benchmarking theory and practitioners. The relevance of benchmarking to tourist destinations was examined through the measurement of performance, types of destination benchmarking and taking action. It is apparent that specific measures could be developed for destinations. Both internal and external benchmarking could be applied to benchmarking of destinations. However, in the case of external benchmarking, this research indicated that each destination might have its own regional differentiation and unique characteristics in some respects. Cross-cultural differences between tourists from different countries also need to be considered. Given these findings, it is possible to suggest that this research makes a fresh and innovative contribution to the literature not only on tourism but also on benchmarking. The contribution of this study's findings to knowledge exists in the methods and techniques used to identify the factors influencing selected destination performance variables and in the methods to be employed for comparison between the two destinations. Caution should be used in generalising the results to apply to other destinations.

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Metin Kozak
Sheffield, 2000.

The Author

Metin Kozak graduated from the School of Tourism and Hotel Management, Cukurova University, Turkey, in 1991. He obtained his Master's degree in tourism management from Dokuz Eylul University, Turkey, in 1993. As part of his dissertation, he examined the impact of various supply-related factors on international tourism demand in Turkey. This study was published, as a research note, in *Annals of Tourism Research* in 1998.

Metin had already been registered as a PhD student in tourism before he obtained a scholarship to continue his studies in the UK. He also has teaching qualifications at the undergraduate level. He had lectured on public relations, tourism and hospitality at Mugla University, Turkey, for three years before he was appointed as a research assistant at the same university in 1995. In 1997, he was invited by the University of the Balearic Islands to deliver a three-day industrial lecture on the impact of recent developments in information technology on the tourism industry.

He has published in several national and international pure management, tourism and hospitality journals, both in English and Turkish, and presented papers at various national and international conferences held in UK, US, Denmark, Switzerland, Ireland, Austria and Turkey. He is also the co-author of three books published in Turkish. He was nominated as a candidate for the award of the researcher of the year 2000, established by the Association of Professional Authors and Editors of Tourism in Turkey (TUYAD).

In terms of his practical experiences within the industry, Metin worked in various hotel departments such as purchasing, accounting and front office operations as well as in incoming tour operations prior to commencing his academic studies in 1991.

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Chapter One

Introduction

1.0. Introduction

This study aims to focus on the development of a destination benchmarking methodology and its testing using both quantitative and qualitative research techniques. The review of past benchmarking literature showed that there are a substantial number of both conceptual and empirical attempts to formulate a benchmarking approach, particularly in the manufacturing industry. However, there has been limited investigation and application of benchmarking in tourism businesses and particularly in tourist destinations. As an introduction to the study, this chapter briefly discusses the development of the destination benchmarking concept and its rationale along with setting the research aim and objectives and methodological procedures. Brief information about each of the succeeding chapters is also given.

1.1. The Study

In recent years, tourism has become a highly competitive market. The development of the tourism industry reflects the wider development of tourist destinations which are becoming more important than individual businesses. A number of factors contribute to this trend. Tourists are more familiar with the practicalities of travel - booking their holidays, making the journey, learning other languages and making return visits to a favourite resort. New destinations have emerged in the international market, e.g. the Caribbean and the eastern Mediterranean. The media and tour operators are having an increasing impact on the market. Tourists, suppliers and intermediaries are all becoming more concerned about the environment. Finally, the contribution of tourism to the local economy is significantly increasing. As the expansion of holiday destinations around the world makes the compe-

tition more fierce, each destination could establish goals and objectives to attract the type of tourists who are relevant to what it has to offer. To achieve this, priority might be given to identifying major tourist motivations and needs and whether they are likely to return. An examination of how other destinations, particularly competitors, perform is also the subject of this category of research.

The concepts of benchmarking and competitiveness are strongly related. Success in the former brings success in the latter. Perhaps this is why benchmarking has been increasingly applied by many individual and governmental organisations. Benchmarking has become a significant tool for total quality improvement in manufacturing and service industries. There are a number of benchmarking examples in the literature, but very few concerned with the tourism industry. A lot of work has been carried out in relation to the measurement of destination performance through image and customer satisfaction measurement research, either comparatively or individually. Although the potential benefits of benchmarking in tourism have begun to be recognised by practitioners and authorities since this research started, an extensive review of the literature has demonstrated that there is still a clear gap in the benchmarking literature relating to tourist destinations. Organisations such as the European Commission and regional tourist boards in Britain have recently begun to carry out destination benchmarking research, particularly focusing on external benchmarking, which is applicable for practical uses, rather than developing a research methodology.

Until very recently, efforts to apply benchmarking to tourism have been confined to individual organisations such as hotels. These studies have several weaknesses in terms of the use of research methods and choosing approaches. These weaknesses also exist in the general benchmarking literature. It has been observed in such literature that there are far more conceptual papers with the emphasis on the advantages or disadvantages of benchmarking and potential ways of using it than empirical research focusing on methodological concerns such as how to generate and assess data, to measure one's own performance and possible gaps compared to others. The literature suggests several stages in a benchmarking study. The prior-

ity, however, should be on the proposition of a relevant and accurate methodology to investigate how to measure performance gaps and who needs to be involved in the study rather than listing the necessary practical procedures.

Such weaknesses of previous research into methodology have brought another dimension to this study. On starting this research project, the prime purpose was to develop a specific destination benchmarking model by following the guidelines of previous benchmarking literature. Then, it became apparent that the existing benchmarking literature does not pay sufficient attention to the development of an effective benchmarking model. The term 'benchmarking' has been used incorrectly by both practitioners and academic researchers. There are many questionable research projects into 'benchmarking'. Excluding quantitative measures, the previous research lacks the proper investigation and the use of qualitative measures. For example, there are limited applications in respect of statistical test assessment, the consideration of cross-cultural differences between nationalities and differences between demographic, economic and psychographic characteristics of individuals. Very little research has been carried out on how one organisation can learn from another and apply the lessons learned to its own organisation. This study therefore attempts to fill this generic gap while at the same time applying the benchmarking concept to tourist destinations.

This study considers two categories of benchmarking in terms of its micro and macro applications: organisation benchmarking and destination benchmarking. Organisation benchmarking deals with the performance evaluation of only a particular organisation and its departments. In contrast, destination benchmarking draws a broader picture including all elements of one destination such as transport services, airport services, accommodation services, leisure and sport facilities, hospitality and local attitudes, hygiene and cleanliness, and so on. Since the destination benchmarking had been neglected both from the practical and academic perspective when this research was set up in the autumn of 1996, the focus was on developing a specific benchmarking methodology which would be relevant in the context of international tourist destinations. This study also proposes that bench-

marking could be used to enhance the performance level of different international destinations by identifying their strengths and weaknesses firstly in comparison to other similar destinations (external benchmarking) and secondly without such comparison (internal benchmarking).

The literature suggests two main components of benchmarking studies: performance benchmarking (elements of quality and customer satisfaction and qualitative measures) and process benchmarking (discrete work, processes and operating systems). Performance benchmarking compares performance levels between organisations on the basis of ranking (outcomes) whereas process benchmarking seeks to investigate how others achieve their aims (drivers). In its preliminary research aims and objectives, this study investigates the performance benchmarking approach since this would make it easier to examine the reasons for the superiority or deficiency in the performance indicators. A supplementary objective is to achieve the process benchmarking.

In terms of the performance measurement of destinations, competitiveness could be evaluated both quantitatively and qualitatively. Quantitative performance of a destination could be measured by looking at such data as tourist arrivals and income from tourism (hard data). There is also a need to take into account the relative qualitative aspects of destination competitiveness (soft data), as these ultimately drive quantitative performance. Dimensions contributing to qualitative competitiveness include those attributes or items which tourists most liked or most disliked during their vacation. A further assumption here is that in arriving at a positive or negative view, tourists compare these attributes in terms of their experience of the same or other destinations. The elements of qualitative measures included in this study are tourist satisfaction, tourist comments, tourist motivations and repeat tourists' opinions. The quantitative measures include the volume of tourist arrivals, volume of repeat tourists, volume of tourism receipts, tourist expenditure based on sub-categories and length of stay. In terms of the supply side, measures could be given from the analysis of quality grading and

eco-label systems, the number and the type of accommodation available, other tourist attractions, and so on.

In general the benchmarking literature has focused on the development of external benchmarking procedures. Thus, attention should also be paid to understanding whether external benchmarking is the only solution or whether there could be any other method for identifying performance gaps and accelerating continuous performance improvement, e.g. internal and generic benchmarking. Internal benchmarking refers to monitoring the performance objectives released by the tourism authorities (tourism officers, destination managers and so on) during the planning stage. Generic benchmarking looks at national or international standards in order to find effective solutions for their particular problems by reviewing best practices. This research examines the possible applications of internal, external and generic benchmarking methods to tourist destinations. Generic destination benchmarking is discussed in terms of a conceptual approach as it is not empirically tested due to time constraints; but the remaining two methods will be tested by the use of primary and secondary (statistical) data.

1.2. Aims and Objectives

In line with the context of the above discussion, the aim of this study has been defined as follows:

to further develop the concept of benchmarking for application within tourist destinations and to evaluate its potential impact on destination performance.

The main objectives of this study are to:

1. evaluate approaches to benchmarking and their application within tourist destinations

2. develop an initial benchmarking methodology for use within tourist destinations
3. test the application of the benchmarking model in two international tourist destinations
4. identify and appraise areas of strength and weakness within the two international destinations and their implications for destination management and development
5. evaluate the operation of the model, assess its utility and make necessary modifications
6. make recommendations regarding future research in the area
7. make recommendations for further practical application of benchmarking in tourist destinations.

1.3. Research Methodology

The positivist approach consists of inductive and deductive research methods (Bryman 1988). In the former method, theory reflects the accumulated findings of empirically established facts (moving from empirical findings towards theoretical implications). In the latter method, empirical research is based on the existing theories. Hypotheses are derived from theories and are then empirically tested. Research findings are analysed to determine if they make a contribution to the existing theories (moving from existing theories towards theoretical implications). The following stages are suggested in designing a systematic line of methodology research (Bryman 1988; Dann, Nash and Pearce 1988; Bryman and Cramer 1990). The first stage is 'conceptualisation', where research problems are identified. The next is 'operationalisation', which aims to undertake the task of setting and testing hypotheses. In order to establish more accurate and original research problems,

the first two stages require an extended review of previous relevant literature contributions. The third stage, 'measurement', employs any of the nominal, ordinal, interval or ratio methods. This is followed by the stage of data collection by identifying the sample population and utilising quantitative and/or qualitative research methods. The final stage, 'data analysis' presents the findings. The objective of the last three stages is to seek causal connection between hypotheses and empirical data and draw conclusions. Depending upon the results of this stage, hypotheses are rejected or verified.

The literature in the field suggests that both methods could be used for various purposes (Bryman 1988). Some questions can be answered by carrying out quantitative research as others can be examined by following the guidelines of qualitative research. Moreover, quantitative research aims to test existing theories as qualitative research is associated with the generation or the development of theories. The latter is also used to assess the relevance of existing theories. This study considers the use of quantitative and qualitative research methods in tandem (combined approach). In other words, this study is an amalgam of quantitative data, observational data and documentary evidence elaborated to contribute to the existing benchmarking literature by testing several pre-determined research hypotheses (deductive research approach).

In line with these criteria, this study presents a five-step model building approach to aid the researcher in applying destination benchmarking methodology. This approach provides a model for developing a destination benchmarking methodology and interpreting and validating its findings. This initially focuses on a research plan, starting with a conceptual model development by examining the previous literature and its linkage with benchmarking tourist destinations (Stage I). As an element of conceptual approach, the three types of benchmarking are introduced into the field of tourist destinations and both qualitative and quantitative measures are used to test them (Stage II). Selected performance measures of destination benchmarking are tested by collecting both primary and secondary data (Stage III). When the data has been analysed, the model is expected to be revisited and

revised, if necessary (Stage IV). Depending upon the limitations of the research, recommendations for further research need to be addressed (Stage V).

The relevant literature particularly in relation to competitiveness, benchmarking, customer satisfaction, research methodology, tourism and hospitality is reviewed. The review identifies deficiencies in both benchmarking theory and practice. A programme of primary and secondary research is also carried out to test the research hypotheses. Three types of individual questionnaires are developed. The first questionnaire is primarily intended to measure internal performance while the next two questionnaires are designed to measure external performance. With limited exceptions, much of the past research using primary methods was undertaken without evidence that respondents had actually been to the sample destinations. In this study, sample populations are required to have direct experience in order to respond accurately to all questions regarding their actual holiday experiences. Sample populations selected for this study therefore represent those who had been on holiday in the resorts of Mallorca and Turkey, as a part of two-way benchmarking research; and in some other self-selected international destinations.

A single research instrument is needed which can be simultaneously answered by both sample populations visiting Mallorca and Turkey. There was no particular reason for selecting Mallorca and Turkey as sample destinations for this study, except for the one that the researcher is familiar with both destinations which facilitated the collection and the interpretation of the primary and secondary data. However, as the research progressed, the interpretation of the secondary data and first-hand observations in Mallorca indicated that Mallorca and Turkey, as Mediterranean destinations, could be in the same competitiveness set as both offer similar types of tourism products (summer tourism) and attract similar types of customers, e.g. with a concentration in the British and German markets. It has also been observed that Mallorca is a well-established destination and has been familiar to international tourists longer than Turkey. Observing the lack of cross-cultural comparisons as another deficiency of existing benchmarking literature, this study includes these two markets as the sample population to incorporate the

problem of how to consider cross-cultural differences while establishing a benchmarking model.

1.4. Brief Overview of Chapters

The published literature on benchmarking mainly concentrates on individual organisations operating in manufacturing industry. Its operationalisation in service industry has only recently been addressed. There is too little empirical research focusing on the development of a specific benchmarking methodology referring to tourist destinations. Despite its limited application for tourism organisations and destinations, a broad range of resources reflecting the characteristics of the terms of benchmarking and destination management is utilised, drawing on previous research in many areas such as management, marketing, economics, planning and so on. A brief resumé of each subsequent chapter is given below:

Chapter 2 concentrates on the first objective. Emphasising the importance of benchmarking as a driving force towards competitive advantage by contributing to the development and management of products and services, this chapter presents an overview of several concepts relating to the concept of benchmarking including the theory of organisation benchmarking, approaches to its definition, methods by which it can be applied and its development in the tourism industry. This chapter also discusses the potential weaknesses in the previous benchmarking literature.

Chapters 3, 4 and 5 refer to the second objective and discuss in detail the elements of the proposed destination benchmarking model.

As a first step towards preparing and performing destination benchmarking research and therefore indicating where and how to be competitive, Chapter 3 attempts to discuss the possible scope of destination management, identify the main reasons for establishing a destination benchmarking study, provide an overall model for those wishing to exploit their performance levels and then analyse its main components. The performance measurement theory has been briefly re-

viewed, along with its application to tourist destinations and the potential use of internal, external and generic benchmarking.

Based upon the destination benchmarking model presented in Chapter 3, this chapter aims to extend the context of information relating to the practice of internal and external benchmarking by presenting methods on what, how and whom to benchmark. Emphasising the lack of benchmarking methodology specifically relating to the measurement of the performance of international tourist destinations, this chapter also seeks to develop various measures which will be relevant to the concept of destination benchmarking. This chapter further examines the contents and the practical applications of these measures from a wider perspective of internal and external benchmarking.

Introducing the existing quality grading and accommodation classification systems, as well as eco-labels, as a form of generic benchmarking for tourist destinations, Chapter 5 aims to argue their importance in performance measurement and improvement. It discusses how benchmarking, linked to external awards and grades, can offer advantages and bring about improvements in competitiveness for destinations. The chapter also provides recommendations on how to develop such systems as generic benchmarking measures and their limitation, in accordance with the measurement of overall destination performance.

In line with the third objective, Chapter 6 provides a discussion of the methodology, research design and procedures employed in the investigation of internal and external destination benchmarking research in accordance with the proposed qualitative and quantitative measures by following a five-stage model building model. The chapter begins with a brief overview of previous benchmarking and destination competitiveness literature and establishes the research hypotheses. Then, it moves on to the operationalisation of the destination benchmarking research methodology. The chapter concludes by examining how all these findings contribute to the related literature.

The fourth objective of this study is the focus of Chapters 7, 8 and 9.

Chapter 7 presents an analysis of empirical findings derived from three different questionnaire surveys carried out amongst British and German tourists visiting Mallorca and Turkey. The analysis of primary data is totally dependent on the destination benchmarking criteria considered from the demand perspective and developed in Chapter 4.

Chapter 8 attempts to illustrate the root causes of differences, if any, between two destinations by using direct quotations from open-ended questions and reflections from the researcher's first-hand observations based on nine major categories of destination attributes. Some photographs taken by the researcher during the participant observation are also taken into consideration as evidence of potential differences between destinations. The results are expected to be useful for checking the validity of the questionnaire surveys and judging the possible implementation of findings in external benchmarking.

Chapter 9 is devoted to the analysis of secondary statistical information about Mallorca and Turkey for testing the pre-identified quantitative measures of destination benchmarking. The discussion is based upon the procedures of both categories of the proposed internal and external benchmarking. Internal benchmarking is carried out by gauging the historical data within the destination itself. The method followed while performing external benchmarking is the examination of similarities or differences between the two sample destinations in terms of the measures given.

Focusing on the fifth objective of this study, Chapter 10 sets out a discussion of research findings in respect of both theoretical and practical implications. It is based upon data gathered from primary and secondary data collection methods and analysed in the previous chapters. The chapter starts with a discussion of testing the four sets of hypotheses. Contributions to the benchmarking literature

are then explicitly pointed out. Practical implications are discussed in the final section of the chapter.

As the focus of objectives 6 and 7, the final chapter, Chapter 11, summarises and reviews the main arguments of the study and considers some of the potential contributions and implications of the research findings and their limitations on the basis of theory and methodology. A list of recommendations for future research and practitioners is also given.

1.5. Summary

Introducing destination benchmarking as a new concept in benchmarking and tourism literature, this study regards it as a tool to obtain competitive advantage by assisting destination management to monitor the performance of its tourism products and services compared to that of previous years and other foreign destinations and to review its positioning strategies. The assessment of qualitative and quantitative measures from the destination benchmarking perspective takes it to a further stage. The rationale of this study is the examination of similarities or differences between tourists from two different countries visiting the same destination as well as those in policies, management and practices between destinations in different countries.

Chapter Two

Overview of Benchmarking Theory

2.0. Introduction

Before moving into evaluating the relevance of the benchmarking theory to international tourist destinations, and their development and management, a brief introduction to the general theory of benchmarking needs to be provided. This chapter therefore aims to review the concept of benchmarking and methods by which it can be applied. In this context, several approaches to the definition of benchmarking and its development are presented. The perceived benefits and costs of benchmarking and the process of its implementation are examined. Methods used to identify gaps are examined on the basis of qualitative and quantitative research. Several weaknesses of past benchmarking research are addressed. Finally, the development of benchmarking within the tourism industry is analysed together with some examples.

2.1. Overview of Benchmarking Theory

The benchmarking theory is simply built upon on performance comparison, gap identification and change management process (Watson 1993). A review of benchmarking literature shows that many of the benchmarking methodologies perform the same functions as performance gap analysis (e.g. Camp 1989; Watson 1993; Karlof and Ostblom 1993). The rule is firstly to identify performance gaps with respect to production and consumption within the organisation and then to develop methods to close them. The gap between internal and external practices reveals what changes, if any, are necessary. This feature differentiates the benchmarking theory from comparison research and competitive analysis. Some researchers make

the mistake of believing that every comparison survey is a form of benchmarking (e.g. Zhao, Maheshwari and Zhand 1995). Competitive analysis looks at product or service comparisons, but benchmarking goes beyond just comparison and looks at the assessment of operating and management skills producing these products and services. The other difference is that competitive analysis only looks at characteristics of those in the same geographic area of competition whilst benchmarking seeks to find the best practices regardless of location (Walleck, O'Halloran and Leader 1991).

2.1.1. Definitions

As a quality management and improvement theory, benchmarking basically stems from Deming's quality management theory which aims to enhance quality and check its sustainability by following several stages in order. Despite this, benchmarking has been given many different definitions by different organisations and authors even though each aims to reach the same conclusion. The Webster Dictionary defined benchmarking as 'a *standard* (italics added) by which something can be measured or judged' (Camp 1989: 248). The three principles of benchmarking are maintaining quality, customer satisfaction and continuous improvement (Watson 1993). On a similar note, the most widely accepted and referenced text on the subject of benchmarking is the definition by Xerox and Robert C. Camp at the end of the 1980s which is 'the *continuous process* of measuring our products, services and practices against the toughest competitors or those companies recognised as industry leaders' (Camp 1989). Benchmarking has been defined by Camp (1989) simply as 'the search for industry *best practice* that leads to *superior performance*.' In other words, benchmarking is a process of finding what best practices are and then proposing what performance should be in the future.

The American Productivity and Quality Centre (APQC 1999) has contributed to the definition of benchmarking by stating that it is 'the process of *continuously* comparing and measuring an organisation against business leaders anywhere in the

world to gain information which will help the organisation take action to *improve its performance*'. Similarly, Vaziri (1992) states that benchmarking is a continuous process comparing an organisation's performance against that of the best in the industry considering *critical consumer needs* and determining what should be improved. Watson (1993) defines benchmarking in terms of its continuity feature referring to the continuous input of *new information* to an organisation. Geber (1990: 36) focused on the significance of looking at best practices in his definition of benchmarking as follows: 'a process of *finding the world-class examples* of a product, service or operational system and then adjusting your products, services or systems to *meet or beat those standards*'.

The words in italic are especially significant in these definitions as benchmarking studies are perishable and time-sensitive. What is a standard of excellence today may be the expected performance of tomorrow. Improvement is a continuous process and benchmarking should be considered as a part of that process. As a result, though different authors have defined benchmarking in different ways, as is in demonstrated in Table 2.1, all these definitions have a common theme namely: the continuous measurement and improvement of an organisation's performance against the best in the industry to obtain information about new working methods or practices in other organisations.

Table 2.1. Approaches to Definitions of Benchmarking

Authors	Features of Benchmarking			
	Ongoing process	Against the best	Performance improvement	Gaining new information
Camp 1989	X	X	X	
Geber 1990			X	X
Vaziri 1992	X	X	X	
Balm 1992	X	X	X	X
Spendolini 1992	X	X	X	
McNair and Leibfried 1992	X		X	
Codling 1992	X	X	X	
Watson 1993	X			X
Cook 1995			X	X
Cortada 1995			X	X
Watson 1997		X	X	X
APQC 1999	X	X	X	

Source: Own elaboration derived from the related literature review.

As Watson (1993) has already stated, it should be 'a process of adaptation, not adoption'. It is not just a question of copying what others are doing, the power in benchmarking comes from sharing ideas. Considering benchmarking as a process of learning from the best practices and experiences of others, some authors have used the term *benchlearning* (e.g. Karlof and Ostblom 1994). Benchmarking is not different from the principle of learning from others' better or worse experiences, but it puts the learning experience into a structured framework.

The benchmarking approach is considered as a significant tool of quality improvement in organisations within the context of TQM (Karlof and Ostblom 1993; Kleiner 1994; Hutton and Zairi 1995). A link between benchmarking and TQM has already been established since both are regarded as a commitment to the continuous improvement of customer satisfaction (Codling 1992; Balm 1992; Zairi 1992, 1996; Barsky 1996). Given this, a number of examples can be given from the practical applications of a TQM and benchmarking relationship. International businesses such as AT&T, Alcoa (Zairi 1996) and Rover Group (Bendell *et al.* 1993) benchmarked themselves against others by initially adopting a TQM programme within their organisations. Research findings indicate that the majority of leading US businesses undertake benchmarking and link it to their TQM efforts (Balm 1992). The implementation of TQM is also a factor in applying for and winning the Baldrige Award, e.g. Motorola and Xerox (Nadkarni 1995).

2.1.2. Background

It is believed that Japanese businesses began benchmarking studies in the 1950s by visiting their western counterparts in order to transfer their technology and business practices to themselves (Bendell, Boulter and Kelly 1993). With reference to the chronological order presented by Cook (1995) for the systematic development of benchmarking, benchmarking was first applied during the 1950s to measure business performance in terms of cost/sales and investment ratios. This stimulated businesses to identify their own strengths and weaknesses by comparing with those

of their counterparts within the industry. However, it was unable to provide alternatives as to how further performance improvements could be achieved.

In the 1960s and 1970s, the growth of computer technology increased the application of benchmarking. In the US in the 1980s, benchmarking became a recognised tool in the development of continuous improvement. The other reason for the spreading use of benchmarking in the US at that time was the Malcolm Baldrige Quality Award. It spread into the UK in the late 1980s. Benchmarking, as a management tool, gained a momentum in 1979 when Xerox decided to observe what its competitors were doing. Before 1979, benchmarking was understood as a comparison of various elements of a business to its previous year's performance. Measures were mostly related to economic indicators such as profits, sales volume and expenses (Swift, Gallwey and Swift 1995). Businesses would use traditional methods to compare themselves to each other. Site visits, the first method, referred to visiting another business to observe what was being done and collecting new ideas that could be adapted. Reverse engineering, the second method, involved the comparison of products. Businesses would buy other businesses' products to analyse how they were made and what kinds of ingredients were used. Competitive analysis, the last one, examined strategies and tactics employed by the competition.

The quantity of benchmarking literature has increased tremendously since 1989 when the first textbook published by Camp appeared. Since then, benchmarking has exploded into other major industries such as telecommunication, health, automotive, transport, medicine, tourism and disciplines such as education. It has been widely used in the manufacturing industry, particularly by the US and the Japanese businesses, e.g. nearly half of the Fortune 500 businesses conduct benchmarking (Cortada 1995). It has been reported that most of the US businesses believe that the amount of benchmarking in their field has increased (Bendell *et al.* 1993). They also believe that businesses must benchmark themselves to stay in the market (Balm 1992). Benchmarking is now recognised internationally as a quality improvement tool (Hutton and Zairi 1995). Benchmarking examples in the interna-

tional arena have also been recorded (Ohinata 1994; Roberts 1995). For example, some US, Japanese and European manufacturing and service businesses have conducted benchmarking studies against each other.

2.1.3. Types of Benchmarking

Although several classifications of benchmarking are recorded in the relevant literature, the main categorisations are internal, competitive, functional and generic benchmarking (Camp 1989; Zairi 1992). The benchmarking literature can be mainly separated into two parts, internal and external benchmarking. In this context, competitive, functional and generic benchmarking will be classed under external benchmarking. As will be seen, the process is essentially the same for each category. The main differences are what is to be benchmarked and with whom it will be benchmarked.

Internal benchmarking covers two-way communication and sharing opinions between departments within the same organisation or between organisations operating as part of a chain in different countries (Cross and Leonard 1994; Breiter and Kliner 1995). Franchising contracts can also be considered to be within the categorisation of internal benchmarking. Once any part of an organisation has a better performance indicator, others can learn how this was achieved. Findings of internal benchmarking can then be used as a baseline for extending benchmarking to include external organisations (McNair and Leibfried 1992; Karlof and Ostblom 1993; Weller 1996). Among advantages to internal benchmarking are the ability to deal with partners who share a common language, culture and systems and having easy access to data (Cook 1995). Therefore, the outcomes of an internal benchmarking study can be presented quickly. However, it is claimed that this type of benchmarking study is time consuming since competitors could be busy with increasing their market share while the sample organisation is busy measuring its internal performance (Cook 1995).

Competitive benchmarking refers to a comparison with direct competitors only. This is accepted as the most sensitive type of benchmarking as it is very difficult to achieve a healthy collaboration and co-operation with direct competitors and reach primary sources of information. As a result, this type of benchmarking is believed to be more rational for larger businesses than smaller ones (Cook 1995).

Functional benchmarking refers to comparative research not only against competitors but also of those who are not in direct competition, but operating in similar fields and performing similar activities (Karlof and Ostblom 1993). For instance, British Rail Network South East employed a benchmarking process to improve the standard of cleanliness on trains. British Airways was selected as a partner because a team of 11 people cleans a 250-seat Jumbo aircraft in only nine minutes. After the benchmarking exercise, a team of 10 people were able to clean a 660-seat train in eight minutes (Cook 1995). This type of benchmarking is also defined as non-competitive benchmarking (Cook 1995).

Generic benchmarking attempts to seek world-class excellence by comparing business performance not only against competitors but also against the best businesses operating in similar fields and performing similar activities or having similar problems but in a different industry (Davies 1990; Breiter and Kliner 1995). This means that a hotel organisation's accounting department would look at the accounting department of a manufacturing organisation that has been identified as having the fastest operations. For example, Rover, a car manufacturing company, benchmarked itself not only with Honda, another car manufacturing company, but also with IBM and British Airways (Cook 1995). It is believed to be easier to obtain data in such arrangements as best-in-class organisations are more likely to share their experiences. However, generic benchmarking can take a long time to complete and research outcomes may need a lot of modification in order for organisations to set their own standards. These are disadvantages for the benchmarker (Cook 1995).

Andersen (1995) introduces a further type of external benchmarking called 'relationship benchmarking' which refers to benchmarking against an organisation with whom the benchmarker already had a relationship in advance of a benchmarking agreement. This method may potentially provide some benefits to organisations since less time is required and the trust established between the two parties will help break down confidentiality barriers. Cox, Mann and Samson (1997) call this as 'collaborative benchmarking'. Introducing 'collaborative benchmarking' as an alternative option to 'competitive benchmarking', they suggest that the purpose should be to study what collaborative organisations can gain from benchmarking together rather than focusing on the benefits only a single organisation will gain.

2.1.4. Analysis of Benchmarking Model

Although benchmarking theory has been derived from Deming's four stages: *plan*, *do*, *check* and *act*, numerous benchmarking process models have been proposed by researchers both in industry and academia. About forty different models have been identified originating from individual organisations, consulting agencies and individual researchers. The number of phases and process steps in these models is variable. While some specify five phases consisting of a total of fourteen steps (e.g. Camp 1989; Karlof and Ostblom 1993), some have just four phases with the same number of steps (e.g. Watson 1993). Having reviewed all the major models, the following steps can be outlined as the main categorisation: Planning, data collection, analysis, action, and review. As widely mentioned in the literature (Camp 1989; Vaziri 1992; Spendolini 1992; Watson 1993), the benchmarking process should begin in the host organisation in order to be able to specify areas which need to be measured. Further steps are collecting data, examining gaps between partners to identify strengths and weaknesses, taking action and reviewing the future performance level of the host organisation. The review stage helps the organisation understand whether the process has achieved its objectives.

In reference to the statement given above, the traditional benchmarking approach refers to the notion that there must be a gap between the host and the partner. The gap analysis model considers the differences between performance levels of businesses. The standard is to be set considering the highest value as the best practice. When the score is greater than zero, it is a strength for business A and a weakness for business B. This is regarded as a positive gap. On the other side, when the score is less than zero, this means that the specific attribute performs better in business B (strength) than business A (weakness). This is regarded as a negative gap. A large negative gap could be an indicator which means that radical change is required (McNair and Leibfried 1992). Depending upon these results, final decision on whether benchmarking research needs to be carried out is made.

Based on a gap analysis, Watson (1993) proposes a benchmarking model where the host organisation initially has a negative gap compared to the partner. As a result of the scheduled managed change, the gap is expected to become positive. This model has several weaknesses. A performance gap can not only be negative or positive but also be neutral indicating no identifiable difference in between compared attributes (Karlof and Ostblom 1994). The partners can go further than the estimated or projected future performance or since the business environment is so dynamic an organisation may be affected by changes in internal or external factors. The gap exists as a result of differences in performance. Only past and present gaps can be known or measured. In the early stages of benchmarking, most gaps are supposed to be negative. When progress is recorded, the gap begins to decrease. Targeted future performance must be greater than the partner's. However, partners are more likely to increase their performance levels even without benchmarking as they gain greater industry experience and infrastructure (Codling 1992). Hence, the benchmarker needs to record a significant improvement initially towards their targets and then to close the gap.

As an attempt to represent gap analysis graphically, the matrix chart (M^2 , Spider Charts or Radar Charts) was developed by Madigan (1993). Although it seems to

be visually similar to standard gap analysis representation, the main difference is in the ability to calculate the benchmark value. In the matrix chart all collected numerical data are brought together to select the best value as a sample. Each numerical value is divided by the best value. If the score is closer to the value '1.0', this means that this attribute is closer to the centre of the chart and performs better. If the score is much closer to the value '0.0', this means that this attribute is far from the centre and needs to be benchmarked (Madigan 1993). In short, this chart allows users to visualise where they are doing well and where they have opportunity to improve, especially when there are more than two businesses to be compared. The weakness of this method is that it assumes that customers of two organisations have the same characteristics or are homogeneous. A modified version of the matrix chart, called 'profile accumulation method', has been applied to point out the benchmark elements of small hotel businesses and results obtained (Johns, Graves and Ingram 1996).

Like the matrix chart, the spider chart is also a method used to represent graphically the performance of an organisation for specific attributes in comparison to partner(s) (Balm 1992). The achieved performance measurement data is represented by current performance (baseline), the performance of partner(s) by the best practice (benchmark) and the level of performance a customer expects for total satisfaction. The latter can be represented, for example, by 'seven' out of a seven-point scale. The centre of the chart represents the lowest performance score of two sample organisations. Though benchmarking between a host and a partner can help close the gap between current performance and best practice, this method fails to explain what it offers to close the gap between current performance and total customer satisfaction unless a perfect sample or practice is found.

2.1.5. The Organisation of a Benchmarking Exercise

Benchmarking literature demonstrates that there are two main approaches to carrying out benchmarking. It can be self administered or conducted by a third party

or research group. In a self-administered benchmarking approach, businesses benchmark their performance levels against others and learn about the best practices for their operations, e.g. competitive benchmarking. In a third-party benchmarking approach, research groups and national and international benchmarking organisations (or consultants) such as the European Foundation for Quality Management (EFQM), the Confederation of British Industry (CBI), UK Department of Trade Industry (DTI) and Benchmarking Clearinghouse measure the performance of a business individually or of an industry as a whole.

Selected businesses are included in the process and the best and worst performance indicators are ranked respectively. On the basis of these results, experts or organisations present their recommendations and action plans. A few organisations such as the US Benchmarking Clearinghouse and the UK Department of Trade and Industry have launched a network for organisations who want to compare their performance levels (on the basis of different indicators) against that of similar organisations. Clearinghouse services include networking, information, partner identification, training and databases of past research. Small businesses may also need the support of consultancy organisations who are experts in benchmarking. Research-based benchmarking studies in academia, like this present research, can also be considered within the category of third party benchmarking methodology.

This type of classification may also illustrate the boundaries of time when a benchmarking research project is conducted. When benchmarking projects are done by third party professional organisations, the benchmarking research will be defined as a singular activity, start with a specific date and have a specific completion date. As far as a self-administered benchmarking is concerned, businesses do not have to limit themselves to particular time periods. They can self-administer benchmarking projects as a continuous activity in order to keep up-to-date with developments in relevant areas (Spendolini 1992). Research findings show that some US businesses are repeating benchmarking studies every two to five years (Bendell *et al.* 1993).

2.1.6. Criticism of Benchmarking

A benchmarking method consists of two parties: benchmarker and benchmarkee. The former is the organisation carrying out a benchmarking procedure whereas the latter refers to the organisation being benchmarked. By reviewing a more extensive selection of literature (e.g. Camp 1989; Zairi 1992; Smith, Ritter and Tuggle 1993; Rogers, Daugherty and Stank 1995), it seems obvious that benchmarking:

- ◆ helps organisations understand where they have strengths and weaknesses depending upon changes in supply, demand and market conditions.
- ◆ helps better satisfy the customer's needs for quality, cost, product and service by establishing new standards and goals.
- ◆ motivates employees to reach new standards and to be keen on new developments within the related area and improves the motivation of employees.
- ◆ allows organisations to realise what level(s) of performance is really possible by looking at others and how much improvement can be achieved.
- ◆ documents reasons as to why these differences exist.
- ◆ helps organisations improve their competitive advantage by stimulating continuous improvement in order to maintain world-class performance and increase competitive standards.
- ◆ is a cost-effective and time-efficient way of establishing a pool of innovative ideas from which the most applicable practical examples can be utilised.

Despite these benefits, time constraints, competitive barriers, cost, lack of both management commitment and professional human resources, resistance to change,

poor planning and short-term expectations are regarded as the main problems affecting successful benchmarking research (Bendell *et al.* 1993). A poorly executed benchmarking exercise will result in a waste of financial and human resources as well as time. Ineffectively executed benchmarking projects may have tarnished an organisation's image (Elmuti and Kathawala 1998). Moreover, there is no single 'best practice' because it varies from one person to another and every organisation differs in terms of mission, culture, environment and technological tools available (<http://www.apqc.org>). Thus, there are risks involved in benchmarking others and in adopting new standards into the own organisation. The 'best practice' should be perceived or accepted to be amongst those practices producing superior outcomes and being judged as good examples within the area. Finally, benchmarking findings may remove the heterogeneity of an industry since standards will themselves become globally standardised and attempts to produce differentiation may fail (Cox and Thompson 1998). For these reasons, Campbell (1999) suggests that organisations should spend little time on benchmarking, instead focusing on their own planning procedures with regard to their own needs.

2.2. Overview of Performance Measurement Theory

The traditional approach regards benchmarking as a tool to discover or adopt innovative ideas. Nevertheless, these ideas are not completely original and already exist in other organisations or destinations. It is important to consider benchmarking as a way to achieve innovation through external information practices. In this respect, different methods for measurement will appear as a significant complementary tool to evaluate one's own and others' performance levels and reach objectives. Camp (1989: 42) points out that the reason for undertaking benchmarking research is 'to develop a standard or measure against which to compare'. The main idea of benchmarking or continuous improvement is that if something cannot be measured it cannot be managed, either (Zairi 1996; Goh and Richards 1997). Thus, as long as benchmarking seeks to identify gaps as a preliminary stage in the proc-

ess, performance measurement based on feedback from customers about the outcome obtained will be necessary because their opinion is the ultimate test, rather than what organisations think or assume. In addition, performance measurement will help to investigate how resources are used in a productive, effective and efficient manner (Karlof and Ostblom 1993). Undertaking benchmarking will confirm the extent to which the organisation's performance results are valid and competitive.

Both benchmarking and methodology literature suggest two categories of performance measures as 'qualitative' and 'quantitative'. In addition, combining both measures, the balanced score card forms the third method. Each measure is briefly explained in this section, but will be examined in more detail in Chapter 5.

2.2.1. Short Review of Quantitative Measures

To consider any value or measure as quantitative, it must be capable of being denoted in a numerical form which falls within a uniform mathematical scale. Examples of performance measures in quantitative terms are financial indicators such as revenues, costs, profitability, number of production and consumption units and so on. These measures are also accepted as outputs (Walleck *et al.* 1991). It is argued that most benchmarking researchers prefer using quantitative rather than qualitative measures due to the ease of measurement and the simplicity of identifying gaps (Holloway, Francis, Hinton and Mayle 1998). Nevertheless, such measures do not give any insight into why the sampled areas perform well or poorly, they only produce values in absolute numbers.

2.2.2. Short Review of Qualitative Measures

Qualitative measures (inputs) indicate the performance of an organisation in relation to its operating practices based on perceptual evaluation by assigning a nu-

merical value to each perceptual degree (Walleck *et al.* 1991). To quantify continuous improvement, it is necessary to transform qualitative data into the quantitative form of soft numbers (Wetzel and Maul 1996). Such measures as quality and customer satisfaction differ from quantitative measures such as productivity and finance. These types of measures are often used by undertaking research with Likert type scales and percentage values to obtain feedback from customers or suppliers. The earlier cases of benchmarking were applied to measure particularly the quantitative performance and improve it, e.g. efforts to decrease costs at Xerox. Then, qualitative measures have begun to appear as a recognition of customer-driven quality measurement as quality has become more crucial than quantity for both customers and service providers (Zairi 1996). For instance, results indicate that reasons for improving customer satisfaction, as a qualitative measure, are to improve business performance and increase customer loyalty (Zairi 1996).

2.2.3. Short Review of Balanced Scorecard

As a performance measurement method, the balanced scorecard presents an overall performance analysis of organisations by using the combination of both quantitative and qualitative measures. It helps organisations look and move forward, become market-oriented and look at their performance levels through different perspectives, namely as customer, internal, innovation and learning, financial perspectives (Kaplan and Norton 1992). It has been mentioned that the balanced scorecard is useful for organisations to become market-oriented, improve quality, shorten the response time, emphasise teamwork, reduce new product development times and manage long-term practices (Kaplan and Norton 1992).

How a business is performing from its customers' perspective has become a vital element in both the manufacturing and service industries. In other words, the image of a business is shaped by customer perceptions of all products and services offered within the business. Customers are likely to be concerned more about time, quality, service and cost. Customer surveys or comment cards can be extensively used to

obtain feedback from customers. The feedback can be helpful for deciding those features which are of great importance to both customers and businesses.

Upon completing customer-based measures, processes, decisions and actions should be established within the business. These internal operations will enable managers to focus on critical or vital elements or operations to satisfy customer needs and reduce customer complaints. Cost, productivity and quality have recently become major issues in hospitality businesses. Among methods to be used are meetings and training courses. The main purpose of innovation and learning through taking different perspectives is to sustain the performance level of the business with respect to customer satisfaction and internal business processes. Measures can be regarded as the level of sales, the level of customer satisfaction or the level of repeat business. The financial perspective examines the profitability, sales growth and cash flow of the business, all of which are measures of quantitative performance.

Though the balanced scorecard has been criticised as being a kind of management system, as opposed to just a measurement system, it has been used particularly in the manufacturing industry (Kaplan and Norton 1993). It has been claimed that the difference between benchmarking and the balanced scorecard system is that the former can be used for process measurement and the latter only for the measurement of outputs (Kaplan 1993). Despite this, benchmarking exercises have recently started to consider outputs such as customer satisfaction and repeat business as well as net profits. This shows that both methods are vital to the measurement process. The results of a balanced scorecard system could be helpful for deciding on or conducting a benchmarking study. Using balanced scorecards, a report on the performance of any business could be easily prepared and a partner who has similar reports be chosen. The comparison of these reports may help both businesses be aware of their strengths and weaknesses and they might need a far shorter time for benchmarking.

2.3. Overview of Past Benchmarking Research

Benchmarking has traditionally involved inter-organisation comparison. This allows the development of improved levels of performance through exposure to the ideas and practices of those organisations acknowledged to have high levels of expertise. As competitiveness forces businesses to improve productivity and quality, many have begun to look externally for new ideas rather than spend time re-inventing the same practices within the organisation. Benchmarking, thinking and looking out of the box, has been adopted to a variety of national and international businesses in order to improve their performance levels, e.g. car production (e.g. Cook 1995), food and drink production (e.g. Mann, Adebajo and Kehoe 1998a, 1998b), and service industries such as health care (e.g. Watson 1993), public services (e.g. Bendell *et al.* 1993), education (e.g. Weller 1996; Tang and Zairi 1998a, 1998b), mail delivery (e.g. Toime 1997), transportation (e.g. Zairi 1998), water supply (e.g. Love, Bunery, Smith and Dale 1998), travel (e.g. Morey and Dittman 1995) and hotels (e.g. CBI 1995)

However, to date, there have been far more conceptual papers on why benchmarking is important and how to operationalise it than empirical research focusing on methodological issues such as how to measure performance gaps. As indicated in Table 4.2, an overwhelming majority of researchers preferred establishing an empirical study based upon the supply side but avoiding the demand side. There are several weaknesses to be addressed in the past studies of benchmarking. While this table is not a complete list of the research in the field, it is indicative of the fact that there is diversity in respect of sampling choice, types of benchmarking, use of quantitative or qualitative measures, considering cross-cultural differences and use of statistical tools. These are explained in detail below.

1. There is a growing body of research assuming that benchmarking is solely a comparison activity (Breiter and Kliner 1995; Zhao *et al.* 1995; Min and Min 1997; Boger, Lai and Lin 1999; Meyer *et al.* 1999). Comparison is only one

stage of benchmarking (performance gap analysis), there are other stages which may be more significant such as taking action and reviewing outcomes in order to improve performance.

2. Little has been done with regard to the empirical assessment of customer satisfaction as a performance assessment and improvement tool although benchmarking literature has highlighted its significance in benchmarking (e.g. Johns, Lee-Ross, Moris and Ingram 1996; Min and Min 1997; Thomason, Colling and Wyatt 1999a). The majority of the proposed benchmarking studies have focused upon the investigation of the establishment of best performance practices and areas from the supply side by using qualitative or quantitative measures of one organisation and their comparison to another (e.g. Bell and Morey 1994; Edgett and Snow 1996; Mann *et al.* 1999a, 1999b; Zairi 1998).
3. There has been a very limited use and variety of statistical tools to test the significance level of results yielded from the comparison of qualitative measures such as mean scores (e.g. Bell and Morey 1995; Johns *et al.* 1995; Min and Min 1997; Goh and Richards 1997). Statistical tests are able to reveal the magnitude of proposed gaps. When needed, performing the relevant statistical procedures confirms the extent to which the survey outcomes are reliable, valid and meaningful for drawing conclusions.
4. Benchmarking studies ensure that customers visiting different organisations are homogeneous in terms of their socio-demographic and socio-economic characteristics as well as in terms of motivations, purchasing behaviour and loyalty. In other words, one customer group shopping from one organisation may not be in the same category as another shopping from a different organisation. This argument has been underestimated within the benchmarking literature (European Commission 1996; Thomason *et al.* 1999a, 1999b). Given an example from a destination benchmarking study, it is not reasonable to expect that tourists visiting Italy are as homogeneous as those visiting Greece or that both destinations attract similar markets.

Table 2.2. Overview of Past Benchmarking Research

Authors	Sampling	Types Of Industry	Types Of Benchmarking	Quantitative or Qualitative Measures	Cultural Imp. (Supply)	Cultural Imp. (Demand)	Gap Analysis	Objectives	Statistical Tools
Thomason, Colling and Wyatt 1999a	Customers	Destination in the UK (1)	Internal (comparison with previous years)	Qualitative (Likert scale)	N/A	No	Yes	To identify strengths and weaknesses	No
Thomason, Colling and Wyatt 1999b	Customers	Destinations in the UK (14)	External	Qualitative (Likert scale)	No	No	Yes	To seek the best practices and identify strengths and weaknesses	No
Meyer et al 1999	Organisations	Service industry in the UK, US & Germany	External	Qualitative (Likert scale)	Yes	N/A	Yes	To establish the best practices and performance areas	Yes
Boger, Lai and Lin 1999	Organisations	Hotels in the US	External	Quantitative (metrics such as room rates)	No	N/A	Yes	To establish the best performance scores	Yes
Mann, Adebajo and Kehoe 1999a	Organisations	Various industries in the UK	Generic	Qualitative	No	N/A	Yes	To achieve the best practices set by EQA	No
Mann, Adebajo and Kehoe 1999b	Organisations	Food industry in the UK	Generic	Qualitative (Interview)	No	N/A	N/A	To achieve the best practices set by EQA	N/A
Zairi 1998	Organisations & Customers	Transportation industry	External & Internal (comparison with previous years)	Qualitative and Quantitative	No	No	Yes	To establish the best performance areas	No
European Commission 1998	Destinations	Destinations in Europe	Internal	Case studies	No	No	N/A	To establish the best performance areas	N/A
Phillips and Appiah-Adu 1998	Organisations	Hotels in the UK	External	Qualitative (Likert scale)	No	N/A	Yes	To establish the best practices	No
Min and Min 1997	Organisations & Customers	Hotels in Korea	External	Qualitative (Likert scale)	No	No	Yes	To establish the best performance scores	Yes
Goh and Richards 1997	Organisations	Public and private industries in Canada	External	Qualitative (Likert scale)	No	N/A	Yes	To identify ways to improve organisational learning	Yes
Edgett and Snow 1996	Organisations	Financial services in Canada	External	Qualitative (Likert scale)	No	N/A	Yes	To establish the best practices and performance scores	No
Johns, Lee-Ross, Morris and Ingram 1996	Customers	Hotels in the UK	External & Internal	Qualitative (free-response survey)	No	No	Yes	To identify strengths and weaknesses	Yes
Department of National Heritage 1996	Organisations & Customers	Hotels in the UK	Generic	Qualitative (scoring)	No	No	N/A	To identify the best practices based on performance scores	No
Breiter and Klinner 1995	Organisations	Hotels in the US	External	Qualitative (Likert scale)	No	N/A	Yes	To establish the best performance scores and areas	Yes
Morey and Dittmann 1995	Organisations	Hotels in the US	External	Quantitative (costs) and qualitative	No	No	Yes	To establish the best performance scores	No
Bell and Morey 1995	Organisations	Travel industry in the US	External	Quantitative (costs and expenses)	No	N/A	Yes	To seek best practices	Yes
Zhao, Maheshwari and Zhang 1995	Organisations	Manufacturing industry in India, China & Mexico	External	Qualitative (Likert scale)	No	N/A	Yes	To identify the best performing areas	No
Anderson and Camp 1995	Organisations	Various industries in the US	External	Qualitative (Likert scale)	No	N/A	Yes	To identify tools and methods used while benchmarking	No

Source: Own Elaboration from the literature review.

5. A considerable amount of research has been carried out dealing with the application of external benchmarking comparing one organisation's or destination's performance to that of others (e.g. Morey and Dittmann 1995; Min and Min 1997; Goh and Richards 1997; Thomason *et al.* 1999b). Little research allocated efforts to perform or develop methodologies for internal or generic benchmarking studies. Some of those who studied internal benchmarking compared findings to those of previous years (e.g. Zairi 1998; Thomason *et al.* 1999a). Of those who followed generic benchmarking guidelines some attempted to introduce some international quality systems and try to explore the extent to which sample organisations conform to these guidelines or standards (e.g. Mann *et al.* 1999a, 1999b). Some others attempted to establish best practices within the industry based on performance scores marked by both the consultants and customers (Department of National Heritage 1996). Despite this, both internal and generic types of benchmarking seem worthy of further investigation.

6. As shown in Table 2.2, previous studies did not pay much attention to the consideration of cross-cultural differences either between organisations or between customer groups. The possible existence of such differences in organisation culture or national culture or in customer groups from different cultural backgrounds could possibly impact upon the transferability of findings and the success of their implementation into the host organisation. Marketing literature confirmed the existence of cross-cultural differences in attitude and perceptions between customers from different countries (e.g. Richardson and Crompton 1988; Luk *et al.* 1993; Huang, Huang and Wu 1996; Armstrong *et al.* 1997). This requires serious consideration in the future benchmarking research.

2.4. Evaluating Benchmarking Studies in Tourism

Small and large businesses in the manufacturing industry are implementing benchmarking in an attempt to become one of the best in the industry. This could be one

indication as to why tourism businesses and tourist destinations need to use this technique with respect to the service quality they deliver and customer satisfaction they achieve. Although benchmarking has become established into the culture of both the manufacturing and service industries, only a small amount of benchmarking research has been carried out amongst hospitality businesses in order to analyse the competitive position of such businesses by considering the strengths and weaknesses of operations. Some of these studies specifically focused only on individual businesses (e.g. Barsky 1996; Codling 1992; Cheshire 1997) whereas others focused on the hospitality industry overall (e.g. CBI 1995; DNH 1996).

The few examples of benchmarking from within the tourism industry are those involving hotels (Codling 1992; Canon and Kent 1994; Breiter and Kliner 1995; CBI 1995; Morey and Dittmann 1995; Barsky 1996; DNH 1996; Struebing 1996; Johns *et al.* 1996; Johns, Lee-Ross and Ingram 1997; Min and Min 1997; Phillips and Appiah-Adu 1998). The benchmarking approach was further used in visitor attractions. HMS Victory was benchmarked with other well-known organisations such as the Tower of London and Dover Castle (Cheshire 1997). The majority of these studies focused on the assessment of customer satisfaction as a qualitative measure of performance in identifying strengths and weaknesses of businesses (Barsky 1992; Morey and Dittmann 1995; DNH 1996; Johns *et al.* 1996, 1997; Min and Min 1997). There are also several examples of research on the supply side using quantitative measures such as occupancy rates, cost, revenues and capital investment (Breiter and Kliner 1995; CBI 1995; Morey and Dittmann 1995). Some hotel chains (e.g. Ritz Carlton) not only benchmark other businesses but are also benchmarked themselves by other service or manufacturing businesses (Canon and Kent 1994; Struebing 1996).

The most recent benchmarking study concerns tourist destinations. Several organisations have recently directed their attention towards carrying out destination benchmarking research which is applicable primarily for practical uses. Of these, in order to highlight the importance of tourist satisfaction with destinations and to

encourage the improvement of the competitive advantage of European tourist destinations, the European Union initiated a project in 1997 called 'An Integrated Quality Management of Tourist Destinations'. This project aims to develop several measurable quality standards in respect of different components of coastal, rural and urban destinations and implement them among the member countries of the European Economic Area (European Commission 1998). The project includes the assessment of both demand and supply-side indicators such as the activities of tourism professionals, tourists, local residents and natural, cultural and economic environmental resources. The study includes 15 destination-based case studies. However, research methods used and approaches chosen are not yet clear.

At the regional level, several regional tourist boards in England have begun modelling destination benchmarking surveys by considering visitor satisfaction as the best value for gaining competitive advantage (Thomason *et al.* 1999a, 1999b). The overall objective is to produce a national benchmarking data-base by repeating similar surveys in different parts of the country. Destinations are categorised into historic towns, cities and seaside resorts. Among the attributes used for the measurement and comparison processes are attractions, food and beverage facilities, shopping facilities, accommodation facilities, parking services, public transport, signposting, cleanliness, hospitality and tourist information services.

There has so far been a very limited use of benchmarking in the tourism industry, and it is still in its infancy and has been restricted to the study of operational units and businesses, rather than destinations. It is significant that the limited examples of benchmarking carried out within the tourism industry almost all involve the benchmarking process being carried out by third parties external to the organisations being benchmarked. Both quantitative and qualitative measures were used by collecting data from questionnaire surveys, secondary sources and observations. There is a limited number of benchmarking studies in tourism solely focusing on measuring the performance of tourist destinations and providing methods to improve it. The weaknesses of the benchmarking research noted earlier also apply to

the context of benchmarking in the tourism and hospitality industry. In the light of these observations, it is obvious that the benchmarking model needs further development.

2.5. Summary

This chapter is an overview of benchmarking theory and its implications for performance improvement and competitive advantage. It has also addressed several weaknesses in past studies of benchmarking. There is little experience of putting benchmarking theory into practice. Major criticism of previous benchmarking studies could focus upon the types of sample chosen, types of benchmarking used, types of measures developed and tested, types of statistical procedures employed, and the lack of cross-cultural investigation either between sample organisations or between customers while taking action. Bearing these points in mind, the following chapters, including the research methodology, will focus on developing a conceptual destination benchmarking approach. As a first step towards preparing and executing destination benchmarking research and therefore indicating where and how to be competitive, the next chapter will attempt to explore the main reasons as to why a particular destination benchmarking approach is necessary and then present its main elements.

Chapter Three

Towards Destination Benchmarking

3.0. Introduction

The previous chapter provided an overview of benchmarking, compared approaches to it, examined measurement issues and research contributions. As a performance management and improvement method beyond comparison research, benchmarking was originally carried out within manufacturing businesses to identify gaps and suggest the relevant techniques to close them. Subsequently, it has been modified by different researchers and also applied to service industries, e.g. accounting, hotels and transport. Despite this, the literature review demonstrates that there is still a clear gap in the benchmarking literature relating to tourist destinations. In line with the theoretical background presented earlier, this part of the research along with the next two chapters will therefore examine the applicability of the benchmarking concept to tourist destinations as a performance measurement, improvement and competitive advantage tool.

3.1. Rationale for a Destination Benchmarking Model

As in every industry and business, many tourist destinations are in competition with one another to obtain a greater proportion of international tourism by attracting more foreign tourists (Goodall 1988; Heath and Wall 1992). Developments in international tourism and travel have intensified competitiveness between international destinations. New destinations have emerged in the market as tourists and suppliers are now becoming more concerned about environmental and cultural values, e.g. the Caribbean and the eastern Mediterranean. Tour operators and the media are having an increasing impact on the market. Tourists are more experienced

and knowledgeable. For example, in their familiarity with other languages, using a variety of transportation, booking their holidays and with having visited the same destination more than once. Competitive analysis is made difficult because of the large number of variables which affect it. The response of customers as to whether these variables are about satisfaction is also important and needs to be included in the analysis.

Competition among destinations might contribute to the development of products and services. Providing better services not only gives an enhanced competitive edge but also raises standards in the industry which in turn will be reflected to customers as a determinant of greater expectations. As a result, the customer's value chain would become an input of competitive advantage (Porter 1985). Understanding what satisfies a customer's needs and wants is the basic ingredient of a recipe for arriving at successful marketing and improving competitive advantage (Czepiel, Rosenberg and Akerele 1974). Customers are an important source of identifying external ideas for many products and services; surveys enable them to reflect on their opinions about and experiences at the destination. When tourists are satisfied with the destination, its satisfied customers are likely to come back or recommend it to others. In contrast, when customers are dissatisfied, they will have the power to decide neither to come back nor make favourable word-of-mouth recommendation. As a consequence, customer-centred organisations or destinations are expected to have a greater opportunity to win over the competition (Kotler 1994).

In order to talk about the competitive advantage of destinations, Crouch and Ritchie (1999) stress that value must be added to the existing economic resources and the tourism industry must concentrate on the term *destination competitiveness* rather than *destination comparison* as service industry is differentiated from manufacturing industry by its more subjective features. The authors further suggest that economic and natural resources can be accepted as the determinants of comparative advantage since similar destinations may have these types of resource, e.g.

warm weather, sea and beaches in Mediterranean countries. In other words, destinations with identical products will be alike. A destination positioning strategy could aim to make customers perceive one destination as in some ways unique (Goodall 1990; Ahmed 1991; Javalgi, Thomas and Rao 1992; Heath and Wall 1992; Crompton, Fakeye and Lue 1992; Grabler 1997). If a destination is to be competitive it needs to focus on those factors which can help it to be distinctive. Therefore, the question of how to sell the experience of a vacation at a particular destination rather than the sale of the resource itself might be of great concern in maintaining competitive advantage. This could be accepted as good practice in tourism. Such factors as feelings of safety and security, cleaner beaches and establishments, more hospitable and friendlier local people and better value for money could make one destination more competitive than or distinctive from others. This brings about the significance of fulfilling benchmarking studies in order to classify what other destinations provide and how they achieve their objects.

The literature emphasises that benchmarking is the method driving organisations towards competitive advantage as it provides an increased awareness of products, costs and markets in a particular industry (Zairi 1996). It is helpful to look at the competitiveness theory which points out attempts by organisations to maintain competitiveness among themselves (Porter 1985). Reflecting on this theory, it is possible to suggest that benchmarking could be an important tool for a destination to enhance its competitiveness. In destination benchmarking research, findings might be interpreted and used to understand how competitive a destination is and in what respects, and identify what methods or strategies it needs to apply to improve itself.

This part of the study therefore seeks to set out a rationale for developing a benchmarking approach specifically applicable to international tourist destinations. Key developments supporting the case for tourism destination benchmarking are summarised in Table 3.1 and are then considered individually in greater detail below.

Table 3.1. Reasons for Destination Benchmarking

1. Increasing importance of destinations
2. Importance of multiple components to overall tourist experiences
3. Changes in tourists' needs, wants and habits
4. Tourists' intention of making comparison between destinations
5. Problem of seasonality
6. Influence of the destination's performance on its elements

Source: Own elaboration derived from the related literature review.

1. As a result of increases in the demand for package holidays for the last two decades, destinations have become more important than individual attractions and facilities.

Developments in the tourism and travel industry have created new destinations in addition to previous traditional destinations, e.g. seaside resorts and historical places. New developing destinations threaten mature destinations by offering affordable prices and unspoiled resources, e.g. Turkey, Tunisia and the Caribbean Islands as opposed to Spain. Destinations are the focus for attention since they motivate and stimulate visits and are the places where the majority of tourism products are produced and served simultaneously (Ashworth and Woogd 1990; Goodall 1990; Laws 1995). In other words, much of the tourism industry is located and much of the tourists' time is spent at destinations. Tourist satisfaction with a destination or its overall image rather than a facility may therefore lead to repeat visits and word-of-mouth recommendation (Ross 1993; Pizam 1994a; Hallowell 1996; Beeho and Prentice 1997). A benchmarking programme can be considered as an 'input' which will make a contribution to improving the performance of a facility or a destination (outputs). This, in turn, could bring about increased customer satisfaction, customer retention and revenues.

2. From a tourist's perspective, there is a close relationship between all tourism-related facilities and businesses at the destination.

Tourist motivation has been shown to be multidimensional (Pyo, Mihalik and Uysal 1989). Tourists want to have more than one experience at a destination. When they visit, they stay at a hotel, often eat and drink somewhere outside the hotel, go shopping, communicate with local people and other tourists and visit natural, cul-

tural or historic places. On the supply side, the trip is not a single product, rather it is made up of components supplied by a variety of organisations with different objectives. McIntyre (1993: 23) describes the destination as 'the location of a cluster of attractions and related tourist facilities and services which a tourist or tour group selects to visit or which providers choose to promote'. Coltman (1989: 4) presents a more comprehensive definition as being 'an area with different natural attributes, features, or attractions that appeal to nonlocal visitors - that is, tourists or excursionists'. All these elements make a contribution to tourist experiences in different ways. As a consequence of the 'domino effect', lack of quality experience in even one of these areas may influence the overall satisfaction level detrimentally (Jafari 1983).

3. Tourists' needs and wants are changing as they are becoming more experienced and knowledgeable about their needs, wants and their future holidays.

Deming (1982) points out that the customer has a significant place in the definition of quality and suggests businesses try to understand what the customer (market) needs and wants both at the present and in the future. Tourists are becoming more sophisticated and looking for higher standards in quality, innovation and responsiveness as a consequence of developments in technology, increase in mobility and increase in the spread of word-of-mouth communication (Mill and Morrison 1992). Recent developments in technology and hearing about others' experiences give people access to all the information they need to learn about other places in the world. Increasing the mobility of potential tourists, technology has also provided easy access to the same or other destinations either in the short- or in the long-term. Each holiday taken may update a tourist's expectations for the next holiday and widen their experiences, resulting in a tourist group with higher expectations, needs and wants (Nolan and Swan 1984; Cadotte, Woodruff and Jenkins 1987; Boulding *et al.* 1993). Destination suppliers need to know what their customers look for while holidaying around the world and collect feedback regularly about the level of services they have received.

4. Tourists make comparisons between the facilities, attractions and service standards of alternative destinations as they may have experience of other destinations.

Some researchers argue that different destinations are perceived to have unique advantages and/or disadvantages in the minds of travellers (Haahti 1986; Yau and Chan 1990; Laws 1995). Since some or most tourists visit several destinations, their personal experiences or word-of-mouth communication could indicate in which respects each destination is good or bad. Therefore, this study proposes that, as with individual businesses, national or international tourist destinations must also be aware of what others are doing, what features of destinations attract tourists and how likely these features are to be satisfactory. A continuous measurement of customer feedback might help to assess one's own and others' competitive positions, target new customers, revise the current marketing plan and develop new products if required (Mentzer, Bienstock and Kahn 1995; Bramwell 1998). As a consequence, destination managers become open to other practices, e.g. the implementation of guidelines or eco-labels as best practices or looking at other destinations for new ideas or applications. As benchmarking is a continuous learning process, whenever organisations or destinations learn about others or their best practices they may feel that they need to take steps to improve, too.

5. Seasonality is a key factor making an impact on destination performance.

As tourism is a capital-intensive and high risk industry, it takes much longer to bring a return on capital investment. Seasonal fluctuations also affect the case in a negative way (Butler and Mao 1997; Murphy and Pritchard 1997). Benchmarking could introduce possibilities which may lead to destinations becoming very much aware of their own potential for overcoming seasonal fluctuations. Destination products are more likely than organisation products (manufacturing or other service industries) to be sensitive towards seasonal changes in demand. One destination can attract a higher number of visitors in summer or winter time than another depending on what it offers. For instance, European ski resorts have their high season

in winter time and their off-season in summer time whereas this situation is reversed for summer holiday destinations. A possible problem is to balance seasonality as it brings negative results both for the destination and the tourist, e.g. keeping a financial balance despite the difficulty of finding qualified personnel the following season, imposing higher prices to offset the losses in the off-season and experiencing other problems such as noise or a dirty atmosphere in the high season.

6. There is a close relationship between a destination's overall performance level and the performance of all the individual components which make up tourists' experience of a destination.

The literature suggests that an area should have the following characteristics to be considered as a tourist destination: a variety of natural, social and cultural resources and services, other economic activities, host community, a local council, an active private *or* public sector (Davidson and Maitland 1997). As stated earlier, a destination's performance is mainly related to the performance of these elements. When something is wrong with any of these elements, the outcome would be negative which will be reflected back to these elements. In such a case, tourists do not want to come back. The local community's quality of life would be negatively affected due to poor service standards. They would also earn less from the tourism industry. Employees would fear losing their jobs resulting in a lower satisfaction with their jobs. Suppliers would earn less. Most importantly, all the cultural, economic and physical resources would be negatively affected if potential consumers withdrew, as there would be less capital for reinvestment. All these elements of a destination bring about the importance of management in order to keep them and the development of the destination under control, create and stimulate demand for the destination and sustain a positive vision in the mind of customers, retailers and suppliers. This can be achieved using benchmarking.

Having completed the discussion of the rationale for the development and implementation of a benchmarking exercise with particular attention paid to international

tourist destinations, the following section will focus upon the proposal of its model.

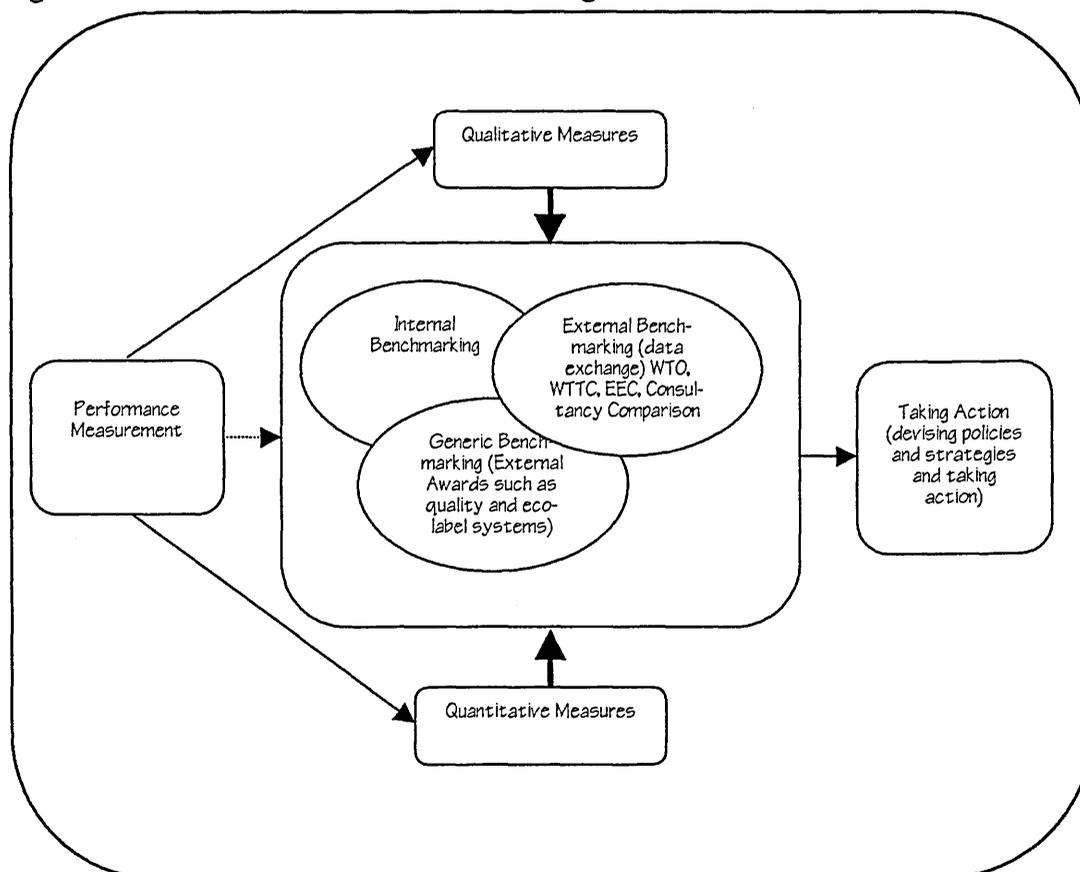
3.2. Elements of Destination Benchmarking

This study proposes a model for use in practice, this will emphasise the importance of performance measurement and improvement for destinations and the role of benchmarking on it. The development of this model has required the completion of an extensive review of literature on benchmarking, destination management and related areas (e.g. Camp 1989; Balm 1992; Codling 1992; McNair and Leibfried 1992; Spendolini 1992; Vaziri 1992; Karlof and Ostblom 1993; Kotler, Haider and Rein 1993; Watson 1993; Cook 1995; Laws 1995; Zairi 1996; Gunn 1997). As emphasised earlier, a common benchmarking study, on which the proposed model has been grounded, is built up with five stages: planning, data collection, analysis, action and review. The planning stage has been replaced by the stage of performance measurement where destination-specific measures of performance are to be identified and the required data is collected to measure one's own performance. The next three stages, data collection, analysis and action, still exist to be used when and where needed. It is important to mention here that, due to the time constraints placed on this research (PhD completion), the review phase has been omitted in this model because the impact of destination benchmarking results upon feedback will be slow although it is suggested in the literature as a final stage of benchmarking.

Figure 3.1 shows how the model is supposed to work. First comes the measurement of destination performance. The second stage is the involvement in any type of benchmarking activity. The last stage, depending on the outcome of the earlier stages, is to take action which includes setting goals and implementing the benchmarking findings. Unlike what is shown in Figure 3.1, the stage of performance measurement is not separated from actual benchmarking. The last stage, taking action, may have different contents for each type of benchmarking.

The relationship between benchmarking and performance measurement and improvement is clear (Walleck *et al.* 1991; Shetty 1993; Kleiner 1994; Bogan and English 1994; Kasul and Motwani 1995; Rogers *et al.* 1996; Edgett and Snow 1996; Brignall and Ballantine 1996; Elmuti and Kathawala 1997; Zairi 1996; Kouzmin, Loffler, Klages and Kakabadse 1999). As noted in Chapter 2, benchmarking is a continuous process targeting performance improvement within various aspects of the organisation. Identifying the level of each destination's performance based upon feedback about the outcome is vital in order to provide a useful indication of its current position of tourism, demonstrate the extent to which it takes place in the international competitiveness set and needs improvement.

Figure 3.1. Elements of Destination Benchmarking Model



Source: Own elaboration

The literature review shows that the idea of benchmarking basically comes from examining the gap between one's own and others' performance levels and (as a result) obtaining new ideas (see Table 2.1, p.15). This means that measuring one's

own performance and its gaps with that of others is the primary stage in the benchmarking study. Galileo wrote 'count what is countable, measure what is measurable and what is not measurable, make measurable' (Mudie and Cottam 1993). This could be a valuable point of departure when undertaking a destination performance measurement either from the demand side or from the supply side to take further action. Highlighting the importance of measurement as a first step in carrying out any type of benchmarking, Karlof and Ostblom (1993) state that 'anything' that can be measured can be benchmarked, e.g. all aspects of an organisation's behaviour and performance such as goods, services, processes, staffing, support systems, capital and value for money. To achieve this, the literature suggests two categories of performance measures named as 'quantitative' and 'qualitative' measures (Hair, Anderson, Tatham and Black 1995). The outcome of these measures could be used in carrying out either internal or external or generic benchmarking. Chapter 4 will concentrate entirely on some specific measures of the destination performance.

The literature suggests that organisations should first begin with internal benchmarking followed by external benchmarking and generic benchmarking (McNair and Leibfried 1992; Zairi 1992). Thus, they attempt to measure their own performance by collecting data on qualitative or quantitative measures. As Figure 3.1 demonstrates, there is a close relationship between all three types of benchmarking. Internal benchmarking provides an introductory stage to undertaking external and generic benchmarking research. Self-generated data derived at this stage may be supplied either to the partner destination(s) or to international organisations such as WTO, WTTC and EEC to be processed and used for exchange or for producing the best performance measures. The data produced may then be redistributed or circulated to those who are interested. As one objective of benchmarking is to search for the best practices and processes which come up with those results, generic benchmarking proposed in this study is supposed to give the destination an objective standard to aim at when internationally-recognised best practice awards or classification systems are used as 'good practices' for improvement. This is obviously a part of external benchmarking.

Once data are collected to measure the current performance, a particular type of benchmarking is selected and the other essential stages such as the assessment of benchmarking findings are completed, destination managers need to focus upon the development of action plans where future policies and strategies would be devised. Each stage of the model is explained in the following section.

3.2.1. Measuring Destination Performance

The concepts of competitiveness and performance improvement are interrelated (Zairi 1996). An improved performance brings advantages for maintaining competitive edge as poor performance requires much attention before the destination can compete with others. These two concepts are also dynamic and continuous. Inputs (e.g. changes in customer needs, wants and satisfaction levels) and outputs (e.g. tourist income and tourist numbers) therefore need to be continuously evaluated and changes observed. Based upon the related literature (Melcher, Acar, Dumont and Khouja 1990; Bogan and English 1994; Bloom 1996; Zairi 1996), it seems that measuring performance, as a key issue in benchmarking, could help destination managers consider the following issues:

- ◆ convert one destination's performance into measures which will be then used to assess if it is comparable and compatible with that of other destinations and how the performance at the same destination changes over time,
- ◆ identify areas where destinations are performing well and poorly and particular attention must be given to those areas to bring them up to standard,
- ◆ evaluate the magnitude and significance of tourism to the local economy,
- ◆ establish co-operation and collaboration with other destinations to share opinions and ideas about both existing applications and possible future developments or trends,

- ◆ carry out regular surveys in order to identify customer needs and expectations, regularly collect feedback from customer groups about the quality of service they have received,
- ◆ give customer groups information regularly about the updated performance of the products and services they may receive to help them know what to expect,
- ◆ assess if extra infrastructure and superstructure are required and if the existing capacity needs to be improved.

As with an organisation's performance (Atkinson, Waterhouse and Wells 1997), measuring a destination's performance may also help people who live there such as local residents, employees, customers and suppliers to evaluate their contributions and expectations. For example, if beaches are not clean, this means that tourists do not use them or are less likely to leave them clean or the staff are not carrying out their jobs properly. A high level of complaints about local behaviour towards foreign tourists means that it needs to be improved. This may then require establishing co-operation and collaboration with tourism and non-tourism organisations at the destination in order to serve customers better.

Taking customer satisfaction on board as a measure of performance, some slight differences appear between the understanding of methods examining the extent to which customers are satisfied or dissatisfied with the manufacturing and the service industries. In the manufacturing industry, the indicators of customer satisfaction or dissatisfaction are measured by the combination of both quantitative and qualitative measures such as the amount of refunds, claims, recalls, returns, repairs, warranty costs and incomplete orders in addition to the rated customer satisfaction levels, complaints and repeat visits (Camp 1989). In the service industry, the measurement method could be based on the number of complaints, the rated satisfaction levels, refunds, incomplete orders and repeat visits, which are all common to those in the manufacturing industry (Richins 1983; Parasuraman, Berry and Zeithaml 1992;

Fornell 1992; Zairi 1996). Factors such as reliability, on-time delivery, responsibility, flexibility, awareness of customer problems and handling of complaints are equally important to both industries. On the other hand, in a service industry, it is impossible to review the number of times when services have been unsuccessful or items needed to be repaired once the consumption or purchase process has been completed.

The scope of benchmarking has been expanded to include all key processes and practices as well as products and services (Balm 1992). A business process requires a series of steps to create an observable or measurable outcome, such as a product or service (Carrie, Haggins and Falster 1995). Destination attributes can also be regarded as processes since experiences appear as a result of interaction between service providers and customers (Gronross 1978; Morrison 1989). For instance, facilities such as hotels, restaurants or airports are regarded as a part of the production of tourist operations. As mentioned earlier, the lack of any of those may create barriers in the development of the area as a destination or create problems for delivering services efficiently through customers. Any process within a destination converts input (products, practices and services) to output which are accepted either as qualitative measures (e.g. customer experiences and perceptions) or as quantitative measures (e.g. tourist expenses and tourist arrivals) used for performance evaluation. The following section provides brief information about the main features of each qualitative and quantitative measure. These will be explained in greater detail in Chapter 4.

3.2.1.1. Qualitative Measures

Qualitative measures are considered as the degree of perceptual values assigned to each numerical value, e.g. number 'one' means not satisfied and number 'seven' very satisfied (Moser and Kalton 1971; Walleck *et al.* 1991; Balm 1992; Hair *et al.* 1995). The level of a customer's satisfaction is regarded as a part of qualitative measures (non-metric or non-quantitative) as it indicates only relative positions and

perceptions in an ordered series. In other words, it is not certain how much satisfaction with or image perception of the destination or what percent of willingness to revisit is acceptable in absolute values to determine whether further stages of benchmarking research need to be employed. For instance, Fournier and Mick (1999) suggest that customers each circling the number '4' on a seven-point satisfaction scale may have less equivalent satisfaction levels. As a result, qualitative measures seem to be relatively subjective.

3.2.1.2. Quantitative Measures

In quantitative measures, differences between two or more points are mathematically equal (or at the same distance) and refer to an absolute value (Hair *et al.* 1995). Both interval and ratio scales are examples of quantitative (metric) measures. As suggested for organisations (Kaplan and Norton 1992), destinations also consider a variety of quantitative measures dealing with overall performance. Among these are the volume of tourist arrivals, the level of tourism incomes, the level of tourist expenditure and its distribution or the percent of repeat tourists (financial perspective). Quantitative measures can be extended to include some other measures relating to the level of tourist satisfaction (customer perspective). As far as tourist satisfaction is concerned, for example, satisfaction with time is measured from the time one destination point receives an order to the time it actually delivers the product or the service back to the customer, e.g. the length of check-in and check-out at the destination airport and at accommodation facilities, time spent waiting for transport at the destination, the time waiting for food to be served in a restaurant or the time spent in waiting for a response about a complaint. As such, quantitative measures seem to be more objective.

3.2.2. Types of Destination Benchmarking

Once the current performance is measured and the area(s) needing improvement is identified, the next stage is to decide which type of benchmarking is to be fol-

lowed. In Chapter 2, the typology of benchmarking was examined under three categories: internal, external and generic benchmarking. All these three types of benchmarking could be applied to tourist destinations as they are important for setting appropriate and realistic targets and assessing either internal or external performance of destinations.

3.2.2.1. Internal Benchmarking

Internal benchmarking is an approach which includes the collection of data on one's own performance and its assessment on the basis of several criteria such as objectives or improvements compared to past years (McNair and Leibfried 1992; Cross and Leonard 1994). Goals set for taking action come out of sharing opinions between departments in the same organisation (Breiter and Kliner 1995). The rationale for choosing to apply this approach is the difficulty of activating external benchmarking due to cultural and managerial differences and access to external data. Reflecting on this introduction, internal destination benchmarking refers to a monitoring process of the performance objectives released by authorities prior to commencing the benchmarking study and then taking action. Objectives could be the assessment of percentage changes in quantitative performance variables and changes in mean scores of qualitative variables, e.g. percentage change in economic variables of tourism such as the level of income, the number of tourists, the occupancy rate as well as customer perceptions, satisfaction and complaints in comparison with previous periods. These data may be valuable in enabling destination managers to review their overall performance each year or season and decide whether they need to get involved in external benchmarking. If so, this information could be used as baseline data for external benchmarking with other destinations (Weller 1996).

Alternatively, the internal performance of destinations could be evaluated by investigating the relationship between several individual qualitative measures, overall satisfaction and future behaviour (e.g. Pizam and Milman 1993; Danaher and Ar-

weiler 1996; Cho 1998). This directly reflects the relative strength of each measure or its importance for customers without attempting to compare performance gaps with past years. At the stage of taking action, objectives could be revised based on findings and the relevant people and organisations within the destination might be asked to share their opinions and experiences. Chapter 4 is devoted to the formulation of internal destination benchmarking procedures and its possible measures.

3.2.2.2. External Benchmarking

The literature shows that the majority of tourism and hospitality benchmarking procedures have been refined in external benchmarking aiming to identify performance gaps and learn about others' best practices (Breiter and Kliner 1995; Morey and Dittmann 1995; Bell and Morey 1995; Min and Min 1997; Phillips and Appiah-Adu 1998; Thomason *et al.* 1999a; Young and Ambrose 1999). In external destination benchmarking, following the principles of the most common benchmarking model (McNair and Leibfried 1992; Cook 1995; Thomason *et al.* 1999a, 1999b), the overall performance of tourist destinations or their specific areas could be benchmarked against other(s) in the same or in a different country, e.g. trends in tourism, capital investment, employment, customer perceptions of satisfaction or image, or structure of tourism demand. It is also feasible to benchmark particular features of service delivery such as customer care, against practices in service industries other than tourism.

The destination for comparison could be selected from those which are perceived as offering a superior performance in some respects and being in the same competitiveness set (Pearce 1997). As a part of external benchmarking, in competitive benchmarking, tourist destinations could be compared with their direct competitors operating in different geographic areas or countries. For instance, one purpose of benchmarking might be to compare the performance of Mediterranean destinations as summer vacation and short-haul destinations for European markets. Eventually, benchmarking findings could be useful for destination managers to make a decision

about what to do or not to do by looking at the outcome of practices applied within other destinations or choosing good practices which are relevant to them. The operationalisation of external destination benchmarking is discussed in Chapter 4, along with its possible measures.

3.2.2.3. Generic Benchmarking

The existing literature emphasises that the core idea of benchmarking is to identify the best practices or the best performing businesses in the industry and improve one's own performance by adopting good practices used by others or guidelines established by professional national or international organisations (Evans and Lindsey 1993; Zairi 1996; Mann *et al.* 1999a, 1999b). In line with these, within the application of generic (or functional) benchmarking, tourist destinations could look either at other destinations or international standards in order to find effective solutions for their particular problems by having access to best practices recognised nationally or internationally. For example, complaints about service quality and environmental deregulation might not be limited to particular destinations. Methods of improving these attributes could be modified to be used internationally, e.g. use of quality grading and environmental labelling systems. Therefore, this study suggests that various quality grading and eco-label systems could act as external enablers, as a form of generic benchmarking, that influence the performance of holiday destinations. These systems and benchmarking have the common goal of providing guidelines on how to improve performance, seek best practices and enable continuous improvement (Vaziri 1992; Mann *et al.* 1999a, 1999b). Generic destination benchmarking and its rationale is addressed in more detail in Chapter 5.

3.2.3. *Taking Action*

The prime purpose of benchmarking is not solely to carry out marketing research identifying what customers most like or dislike. Rather, the main purpose is to de-

velop strategies to provide better services by obtaining feedback from all those involved, e.g. tourists, service providers, local people, and obtaining information about other destinations' practices. As discussed earlier, benchmarking requires effective collaboration, co-operation and co-ordination not only between members of the tourism industry but also between members and external organisations. As Jafari (1983) suggests, tourism and other establishments need to be in harmony with the development and promotion of tourism activities in the destination. In this sense, a destination manager could be considered as the authority who will be in charge of directing resources, co-ordinating not only with local tourism establishments but also with leading national or international tourism and related organisations and directing TQM programmes towards the implementation of the results to achieve goals and objectives. Basically, the potential role of destination managers may be providing local businesses and residents with services such as supervision and inspection.

Each type of benchmarking may require the establishment of separate action plans. The analysis of results derived from internal benchmarking investigation might help to decide which attributes or measures are to be investigated further. The other two approaches (external and generic benchmarking) might assist in identifying gaps, determining strengths and weaknesses of destinations, and deciding which attributes are to be investigated further or which good practices can be adopted from others. The action stage might also help to make future projections and recommendations (Camp 1989; Balm 1992; Karlof and Ostblom 1993; Watson 1993). An action plan containing future goals and recommendations might consist of how to keep up strengths and minimise weaknesses and threats in order to cope with the new applications and developments. Depending on the outcome, destination managers may wish to change their marketing policies or market segments. It may also be possible to attract similar groups of tourists by preserving the current image and improving the existing performance. To implement the benchmarking results, destination managers might make their recommendations to local authorities, local tourist associa-

tions and businesses, local residents and the national tourism policymakers, e.g. the Ministry of Tourism.

3.3. Summary

This chapter has attempted to discuss the possible scope of destination management and approaches to it. It has also provided a rationale for destination benchmarking's contribution to achieving and maintaining destination competitiveness. In line with the guidelines provided by the benchmarking literature and the proposed model, a series of proposals have also been suggested to achieve success in destination benchmarking. The performance measurement theory has been briefly reviewed, along with its possible application to tourist destinations and the potential use of internal, external and generic benchmarking. The stage of taking action has been the final subject examined in this chapter. The next chapter will examine the development of quantitative and qualitative measures of destination performance as exemplars and their assessment from the wider perspective of internal and external benchmarking approaches.

Chapter Four

Internal and External Destination Benchmarking

4.0. Introduction

Based upon the destination benchmarking model presented in the previous chapter, this chapter aims to extend the context of information relating to the practice of internal and external benchmarking by presenting methods on what, how and whom to benchmark. This chapter aims to develop further the context of quantitative and qualitative measures, as the primary sources of destination benchmarking research. This encompasses a number of measures specifically related to the measurement of overall destination performance and suggests how to evaluate each in the context of internal and external benchmarking procedures.

4.1. Practices of Internal and External Benchmarking

The overview of literature refers to the existence of two mainstream approaches to benchmarking: internal and external. Those in the category of internal benchmarking emphasise the importance of internal benchmarking due to the difficulty of providing access to other organisations, adopting the findings to each specific culture and also differences in objectives and management and marketing styles between organisations. There appears to be no problem for generating data and implementing the findings in internal benchmarking (e.g. Bendell *et al.* 1993; Cox and Thompson 1998; Campbell 1999). Those in the second mainstream address the issue that benchmarking is a valuable method for those who tend to transfer successful models of practice resulting in superior performance elsewhere in the industry. According to this group, the rationale of external benchmarking stems from the idea that it is necessary to discover new methods, products or services in order

to be competitive in the international market (e.g. Camp 1989; Zairi 1992; Watson 1993).

The literature has consensus on the fact that the benchmarking process begins in the host organisation in order to specify areas which need to be measured (internal benchmarking), regardless of the application of any kind of benchmarking (Balm 1992; Karlof and Ostblom 1993; Watson 1993; Cook 1995; Weller 1996). The reason is that internal benchmarking provides a number of benefits for those who are involved in the process. For example, areas where problems seem to appear could be identified and, if possible, improved without going outside (McNair and Leibfried 1992; Spendolini 1992; Vaziri 1992).

In a similar way, conducting an internal benchmarking could bring the following benefits for destination authorities: identifying the most crucial factor to the success of a destination, the type of products or services provided to customers, attributes leading to customer satisfaction, attributes causing problems and those with an opportunity for improvement. A possible way of evaluating a destination's current performance could be to look at previous years' records. Previous annual reports such as number or contents of customer complaints, rate of repeat business, occupancy rates, the amount of tourist expenses may help destination management understand if the destination performs better or worse compared to its proceeding years or its standards. Data both on qualitative and quantitative measures need to be gathered and kept as annual records in order to achieve successful results in this kind of self-assessment performance measurement.

On the other hand, external benchmarking is a management technique which initially identifies performance gaps with respect to any production or consumption part of the organisation and then presents methods to close the gap (Camp 1989; Watson 1993). The main objective is to seek answers to such questions as to 'what we and others are doing', 'how' and 'why'. The gap between internal and external practices displays the way where to change and if there is any need to change.

Benchmarking research is designed simply to learn from an organisation's own experiences as well as from other organisations that have experienced similar situations (Watson 1997). It may therefore enable a destination to learn from others' successes and mistakes as long as benchmarking is regarded as a experience-based research activity. It can be possible to investigate the reasons for the result other destinations obtained and develop methods to avoid if it is likely to appear in the destination under investigation.

In Butler's (1980) theory of destination life cycle, a destination will sooner or later reach the saturation point where it will begin losing its attractiveness to a particular market; and destination managers may have to set new management and marketing policies and goals to remain in the market. This could be a reason to look at other destinations and examine their policies and practices. Next, the availability of supply-based factors distinguishes one destination from another and is regarded as a significant factor in maintaining competitive advantage. Competitors could therefore be monitored on a regular basis using various criteria such as analysis of customers' characteristics, the structure of marketing channels, destination image, tourist satisfaction and the availability of tourist resources. Destinations could also compare their performance levels *vis-à-vis* other similar destinations and competitors' strategies. This might enable destinations to reinforce the analysis of their markets and identify their own as well as others' strengths and weaknesses. The findings of benchmarking analysis may help destinations develop the correct positioning strategy and identify areas needing improvement.

Destination managers need to initially pay attention to the characteristics of destinations, to their similarities and differences when choosing the right partner (McNair and Leibfried 1992). As the choice of partner varies with the objective, a categorisation of destinations is required. These are capital cities, developed traditional centres, touring centres, purpose-built resorts and mega holiday villages (Laws 1995). This classification provides basic information with regard to the features of each destination (Table 4.1). International tourist destinations differ de-

pending upon the types of tourism activities and tourism demand that they have. For instance, a Mediterranean destination may be dominated by mass holiday tourism whereas for an eastern European destination it may be by heritage tourism. This kind of categorisation can be helpful for choosing a partner destination against which benchmarking is to be conducted. As widely emphasised in the literature (Watson 1993; Cook 1995), site visits arranged to other destinations can provide an opportunity to make observations regarding what and how they are doing. Upon completing observations, a decision can be made to choose the relevant partner. Generally, it is expected that destinations which are performing better on a number of criteria and thought to be worth sharing ideas with can be approached as potential partners. The other method is to obtain feedback from customers visiting other destinations. All these methods would be helpful in evaluating the main features of other specific destinations and their performance levels.

Table 4.1. Categorisation of Destinations

Type	Target Market	Example
Capital cities	Business and culture	Athens, London, Moscow, Paris
Developed traditional centres	Mass tourism	Hawaii, Ibiza, Bali
Touring centres	Nature and culture	Salzburg
Purpose-built places	Leisure-recreation	Disneyland
Mega holiday villages	Leisure-recreation	Club Med

Source: Laws 1995.

In the data collection stage, several primary and secondary research methods are identified and the best appropriate method is selected. Included in these methods are telephone surveys, questionnaire surveys, site visits and sources of statistical records (Balm 1992; Karlof and Ostblom 1993; Watson 1993; Bogan and English 1994). The literature refers to the collection of two types of data in a benchmarking project, namely internal and external data (e.g. McNair and Leibfried 1992; Zairi 1994). Using these as the background information in destination benchmarking, the former refers to the allocation of primary data concerning the performance of the sample destination. The internal data is kept to use for internal benchmarking. It can be distributed to other destinations when external or generic benchmarking is applied. The latter deals with the allocation of both primary and second-

dary sources of data relating to the factors affecting other destinations' overall performance in particular and the tourism industry in general to carry out the comparison procedure (gap analysis). By using any of these methods, destination managers need to identify the critical processes or activities to achieve a successful result. It is possible to extend the context of the data collection stage to include not only customers but also tourism suppliers and retailers such as tour operators and travel agents which promote destinations by organising and selling tours.

The analysis of the findings and determining the gap between the host and the partner destination is the context of the next stage. The gap analysis not only includes a comparison of research between two destinations but also illustrates gaps between what a particular destination was expecting and what it is really achieving and between levels of its current and past performance. Depending upon the existence and the size of the gap examined in the preceding stage, destination management might have an opportunity to make a decision as to whether it needs to take further action and make improvements in particular elements of the destination. The review stage helps the destination understand whether the process has achieved its objectives. It is thus crucial to introduce several destination-based performance measures and discuss their rationale in destination benchmarking. This is what the next section aims to provide.

4.2. Indicators of Destination Performance Measures

In recent years, tourism has become a highly competitive market. For this reason it is important that destinations are able to measure their competitiveness in order to identify their strengths and weaknesses and thereby develop their future strategies. A Chinese proverb attributed to Sun Tzu, a Chinese General, in 500 BC has gained a respectful response from benchmarking researchers: 'If you know your enemy and know yourself, you need not fear the results of a hundred battles'. (Camp 1989: 253). This means that if the destination knows itself and its competitors, it can take steps to ensure its competitive position is maintained. On the other hand,

if competitors are believed to be particularly strong, it is important to take action. Battles could be over both internal and external barriers affecting the success of the destination and its competitiveness in the marketplace. When tourist destinations are considered as an element of the marketing mix (place), the importance of their performance levels seems clear.

As the purpose of this research is to carry out both internal and external forms of benchmarking, the significant matter is the development of specific measures to evaluate one's own and/or others' performance levels based upon various criteria. In so doing, destination managers may be able to monitor their strengths and identify their weaknesses and, if required, compare themselves with their competitors. As mentioned earlier, the benchmarking literature mostly refers to the quantitative measurement of benchmarks due to the ease of measuring and the use of metrics in comparison research even though it has weaknesses (Holloway *et al.* 1998; Phillips and Appiah-Adu 1998). The criticism of this method is that it does not allow the effects of other conditional (contingent) variables to be considered on the business' performance; and therefore, this appears to focus narrowly on a specific set of performance data. In contrast, this study proposes that both qualitative and quantitative measures could be interpreted simultaneously by carrying out a primary research activity or reviewing secondary research findings. It is proposed that both measures could be interrelated in the investigation of overall performance and benchmarking of tourist destinations. The following sections discuss various qualitative and quantitative measures which could be used to measure destination performance and assist in setting up future management and marketing strategies. It also provides the possible methods on how to apply these measures to the practice of destination benchmarking.

4.2.1. Qualitative Measures

The analysis of the demand side on the basis of qualitative measures provides a vital role in designing a successful destination benchmarking model and also for its

application in organisation benchmarking. As customers are vital in yielding responses to test the effectiveness and efficiency of qualitative measures (Hauser and Katz 1998), they can be considered as a very important ingredient in designing marketing activities in the tourism and travel industry. Most notably, marketing activities start and end with the analysis and interpretation of outcomes yielded from customer feedback (Quelch and Ash 1981). The results could be satisfaction, dissatisfaction, complaints, high or low spending, intention to revisit or never come back and positive or negative word-of-mouth recommendation. In this context, this research introduces a number of qualitative criteria which may be used while measuring the performance of destinations on the demand side.

4.2.1.1. Tourist Motivations

Motivations may differ from one person (or group) to another and from one destination to another. Uysal and Hagan (1993) suggest that the efforts to understand factors pushing travellers to visit a particular destination and how these factors are different from or similar to those of others visiting other destinations, may help the destination management in setting effective management and marketing strategies. Furthermore, some researchers emphasise the importance of motivation in understanding why certain customers choose certain destinations and make certain consumption decisions (Crompton 1979). Push and pull motivations would be equally effective in eliminating alternative destinations and choosing the actual destination (Crompton 1979). Push factors are origin-related and refer to the intangible or intrinsic desires of the individual travellers (e.g. the desire for escape, rest and relaxation, adventure, health or prestige) whereas pull factors are mainly related to the attractiveness of a given destination and tangible such as beaches, accommodation and recreation facilities or historical resources (Uysal and Hagan 1993).

Motivation is vital in the development of attitudes and yielding satisfaction or dissatisfaction at the end of the holiday (Chon 1989). The examination of differences of motivation between sample populations representing different cultures is im-

portant for managers in understanding customer values, preferences and behaviour (Kim 1999). In benchmarking research, examining and understanding motivation is also important. Depending upon the empirical findings, destination management would either promote attributes that best match the tourist motivations or concentrate on a different market where tourist motivations and destination resources match each other. Laws (1991) suggests that the examination of benefits which are important to tourists is crucial for the promotion and planning of destinations.

The examination of tourists' motivation depends on a set of motivations tourists consider while visiting a specific destination or taking a vacation abroad. These can be measured by utilising a likert type scale as it enables the researcher to compare easily mean values with different markets and other destinations (Card and Kestel 1988; Hill, McDonald and Uysal 1990; Baloglu and McCleary 1999a). The higher mean values refer to the level where tourists hold stronger motivations.

4.2.1.2. Level of Tourist Satisfaction

Successful destination management and marketing depends on tourists' perceptions as these may influence the choice of the destination, the consumption of products and services while on vacation and the decision to come back (Deming 1982; Ahmed 1991; Stevens 1992). Some authors therefore draw attention to the importance of customer feedback and customer satisfaction in benchmarking (e.g. Camp 1989; McNair and Leibfried 1992; Smith *et al.* 1993; Bendell *et al.* 1993; Kasul and Motwani 1995; Zairi 1996) even though there is very little empirical benchmarking research conducted by considering customers' opinions in the literature.

Competitiveness is the key element of management and marketing strategy, therefore long-range planning and customer satisfaction could be the two major objectives of either tourism businesses or tourist destinations. Among the long-term benefits of customer satisfaction are a shift upwards in the demand curve, reduction in marketing costs for existing customers due to increase of repeat business,

increase in marketing costs of competitors to attract others' customers, reduction in customer and employee turnover, lower marketing costs for obtaining new customers due to enhancement of positive word-of-mouth communication and the formation of a positive image of the organisation (or destination) in the customers' mind (Fornell 1992). Consequently, customer satisfaction could be regarded as a measure of performance (Krishnan and Gronhaug 1979; Zairi 1996) and one of the greatest sources of competitive advantage (Peters 1994). The concepts of performance and satisfaction are strongly interrelated as the level of product or service performance brings satisfaction. Bogan and English (1994) emphasise that customer-service performance measures should include satisfaction, dissatisfaction, retention and defection benchmarks since the last two represent the customers' intentions in the future. It is claimed that (Cook 1995:29-30):

customer satisfaction is a major benefit to be gained from benchmarking. It allows organizations to adopt helicopter vision and helps prevent complacency through developing the discipline of focusing externally.

It is therefore further suggested that feedback received from customers is a suitable way of comparing the performance of an organisation (or destination) to that of another (Kotler 1994). The availability of alternative service providers (e.g. competitor destinations) appears to be significant in influencing the level of customer satisfaction since customers have a tendency to compare one service encounter with another (Czepiel *et al.* 1974). In respect of the methodological procedures of external benchmarking (gap analysis), as suggested in the benchmarking literature, mean values of each variable can be compared to those of another in a different destination (Madigan 1993; Min and Min 1997). The internal performance of the destination could be measured by employing a set of summary questions in addition to individual satisfaction items. Such questions could refer to the level of overall satisfaction with the destination and the intention to return and to tell others about their positive experiences (e.g. Rust, Zahonik and Keiningham 1996). The examination of the impact of independent satisfaction variables on summary questions is helpful to demonstrate the power of each variable.

4.2.1.3. Level of Tourist Complaints

The consumer behaviour literature underlines the significance of paying attention to handling customer complaints as any unresolved complaint could not only stop repeat visits but also bring negative word-of-mouth communication (e.g. Lewis 1983; Richins 1983; Almanza, Jaffe and Lin 1994). Feedback derived from customer complaints could therefore be helpful for marketing management studies in order to monitor the existing problems and the extent to which products and services are found to be satisfactory by customers. Giving an example from practical applications, Wales Tourist Board (WTB) keeps the records of its visitors' complaints about different categories such as accommodation, cleanliness, service, food and so on (Laws 1991). There is less need to take any further action if the number of complaints is below a certain level. WTB aims to reduce the volume of visitor complaints by establishing accommodation and quality grading systems such as crowns and dragons.

As in all industries, all destinations face the problem of customer dissatisfaction with and complaints about particular products or services at one time or another. It is believed that service providers will improve the product or service as a result of dissatisfaction and complaints which may prevent other customers from experiencing similar dissatisfaction with those products or services (Richins 1979). Otherwise, there would be no effective action taken by management to resolve the sources of complaints and improve products and services (Day and Ash 1978; Krishnan and Valle 1978).

The level of customer complaints has been examined as a measure of benchmarking in earlier studies (e.g. Zairi 1996; Mann *et al.* 1999). Destination benchmarking further suggests that the level of complaints at one tourist destination could be a good reason for another to benchmark itself, to avoid making the same mistakes. For instance, tourists' complaints about noise and dirtiness in one destination may be higher than they are in another. This means that the latter needs to carefully

consider this situation and examine where the former has gone wrong while becoming a popular mass tourism destination. Moreover, the method used by others to resolve customer complaints is the next stage of destination benchmarking. In this manner, not only other destinations or tourism businesses but also practical examples from service and manufacturing industries could be considered (generic or functional benchmarking). Though the content of customer complaints differs from destination to destination and from one industry to another, the basic method of handling them would be similar. This could apply to such examples as the cleanliness of beaches, the forgotten wake-up calls or better communication skills with customers.

In order to be able to understand the types of specific complaints, the question could be 'how likely are you to complain about the attribute X in ...?', copying the methodology of customer satisfaction measurement. Findings can be analysed ranking mean scores. The attributes assigned by the highest mean scores will be those which tourists were unhappy with. Those assigned the lowest mean scores will have no major problems. The application of summary questions is also relevant in this example of a destination benchmarking exercise. These can be used to investigate the impact of the level of complaints about each relevant attribute on the level of overall satisfaction or dissatisfaction, tourists' intention to return and recommend others or tell others about their negative experiences. Alternatively, tourists could be requested to list the attribute(s) that they would complain about. With this method, findings can be ranked in ascending order on the basis of the number of complaints assigned to each attribute.

As another way of benchmarking customer complaints, the percentage of complaints might be calculated by dividing the total number of complaints into the number of total customers in a certain period of time. The highest and the lowest areas of complaint may be identified by ranking scores. Findings could be helpful to analyse the type of complaints about the destination (internal benchmarking) as well its comparison with other destinations (external benchmarking).

4.2.1.4. Level of Tourist Comments

It is emphasised that asking customers to list any problems they had or any improvement they could suggest might be a method of measuring customer satisfaction and could also provide valuable information about what needs to be changed or improved (Kotler 1994). As in the analysis of complaints, customers may be asked to list the attributes which they consider to be improved. Alternatively, adapting the type of questions used to measure customer expectations in the service quality instrument (Parasuraman *et al.* 1985), customers could be requested to indicate how likely they consider each category of a pre-identified set of attributes to need improvement using likert scales such as 'strongly agree' through 'strongly disagree'. Those with higher scores will need to be considered for further analysis of benchmarking studies.

4.2.1.5. Level of Attitudes towards Destinations

The consumer psychology literature suggests that there is a strong relationship between attitude towards an object and behavioural intention (Woodside and Sherrell 1977; Mayo and Jarvis 1981; McDougall and Munro 1994). Likewise, it is further suggested that attitude is a predictor of determining a destination to be selected among alternatives in the awareness set (Goodrich 1977, 1978; Mayo and Jarvis 1981; Um and Crompton 1990). If attitude towards a country or destination is positive, then the intention to visit there will also be positive or higher. Attitudes are believed to be two-directional. Not only do attitudes affect behaviour but also behaviour has an impact over attitudes (Bareham 1995). Thus, a positive attitude towards a destination can stimulate visits while actual holiday experiences at a particular destination change the direction of attitudes in a positive or negative way as a result of satisfaction or dissatisfaction with the experience (Oliver 1981; Mayo and Jarvis 1981; Mountinho 1987). Both visitors and non-visitors can have attitudes towards a particular destination at different levels (Baloglu 1998). The destination management may have an opportunity to change actual visitors' negative

attitudes into positive ones, but it needs more effort to measure and control non-visitors' attitudes towards the destination. Each destination therefore needs to know its performance levels through considering those strengths and weaknesses, which will affect both repeat visits and the nature of word-of-mouth communication to others considering a first visit (Selby and Morgan 1996).

As in satisfaction measures, mean scores are also widely used in attitude measures (Um and Crompton 1990; McDougall and Munro 1994; Baloglu 1998). The contribution of the measurement of attitudes on the internal performance of destinations can be similar to that of the tourist satisfaction measurement method discussed earlier. Thus, the relationship between attitudes and the intention to visit or recommend destinations to others is the method that this study suggests for internal performance measurement. To measure external performance with gap analysis, destination management could investigate attitudes of potential markets not only towards itself but also towards other competitor destinations. Either negative or positive attitudes towards competitors provide destination management potential benefits to decide the type of action to be taken.

4.2.1.6. Level of Image Perceptions of Destinations

Studies of image and attitude are different concepts despite the fact that both are largely used in the field of the marketing. Two people may have the same images of a place, but may hold different attitudes towards it, e.g. warm weather (Kotler *et al.* 1994). The place can be perceived to be warm (image), but one may not like warm weather or travel to a place which is warm (attitude). A number of image studies have been carried out to explore positive and negative perspectives of destinations on several attributes (Pearce 1982; McLellan and Fousher 1983; Richardson and Crompton 1988; Embacher and Buttle 1989; Echter and Ritchie 1991). Such research indicates that destination images influence tourist behaviour (Hunt 1975; Pearce 1982). Image studies play a key role in the marketing and promotion of destinations, particularly for those who have never been to the desti-

nation before (Baloglu and McCleary 1999a). Therefore, benchmarking research could possibly be conducted firstly to understand the areas where the destination is suffering in terms of its image; and methods can be developed to construct a positive image and to suggest how to use this positive image to make people feel that the destination has its own distinctive quality. Although it is claimed that image perceptions of destinations may not always reflect the reality; unfortunately, it could affect the destination choice of potential tourists (Goodrich 1978).

As with benchmarking, image studies are an ongoing process of periodically monitoring changes in people's perceptions of destinations. If one wants to use quantitative research methods, an image can be measured with likert scales (Fakeye and Crompton 1991; Chon and Olsen 1991; Driscoll, Lawson and Niven 1994; Baloglu and McCleary 1999a, 1999b). Results can be evaluated either by ranking attributes from the highest (positive) to the lowest (negative) mean scores or, as mentioned in tourist satisfaction and attitude research, by examining the attributes most likely to persuade potential tourists to visit the destination and recommend it to their relatives and friends. If the sample is selected from those who have been to the destination, the impact of the image perception of each item on the level of overall image perception might be considered as a performance indicator. To achieve this, the summary questions adapted from tourist satisfaction research, in addition to the individual image items, are designed as 'overall how would you perceive the image of destination X?' (Baloglu and McCleary 1999a), 'how likely are you to want to visit destination X?' (Danaher and Arweiler 1996; Kozak and Rimmington 2000) or 'how likely are you to recommend destination X for a vacation?' (Qu and Li 1997; Cho 1998).

4.2.1.7. Feedback from Repeat Tourists

The repeat customers' perceptions of performance changes in relation to several indicators were mentioned by several studies as internal measures of benchmarking (Ferdows and DeMeyer 1990; Mann *et al.* 1999). There has been numerous studies

linking the concepts of benchmarking and continuous improvement (Ferdows and DeMeyer 1990; Melcher, Acar, Duomont and Khouja 1990; Schroeder and Robinson 1991; Elmuti and Kathawala 1997; Ruhl 1997; Band 1997). The observation of developments in the performance of destinations requires the consideration of customers who had previous experiences. Repeat tourists may have more experience of the same destination. Laws (1991) mentions that the holiday experiences of tourists the first time they visit a destination is different from their experiences on later visits. First-time tourists take time to get to know hotel surroundings and to explore other resources in the resort whereas repeat tourists intend not only to revisit familiar places but also prefer extending their knowledge of them to gain a broader perspective. Thus, the observations and comments of repeat tourists could be more valuable for evaluating the overall performance of a given destination as the experiences of those groups will be more detailed.

In the empirical investigation of feedback obtained from repeat tourists leading to destination benchmarking, both open-ended and structured questionnaires may be used. In the former, tourists are requested to reflect in which ways the destination has changed for the better and for the worse since their last visits. Findings are assessed by ranking row scores for each category. A similar technique was applied to investigate tourists' positive and negative experiences at once (Pearce and Caltabiano 1983; Johns and Lee-Ross 1995). In the structured format of the questionnaire, respondents could be asked to indicate how much each particular attribute has changed since their last visit. The questionnaire may be designed to indicate attributes with higher scores as better than those with lower scores.

4.2.1.8. Level of Future Behaviour and Intention

Potential tourists are expected to have only limited knowledge about the attributes of a particular destination they have not visited before (Um and Crompton 1990). So it appears that previous experiences also play a part in tourists' choice of destination (Mayo and Jarvis 1981; Court and Lupton 1997). The majority of destina-

tion choice sets, posited and empirically tested, considered previous experiences as one of the factors affecting tourists' awareness of a destination (Woodside and Lyonski 1989; Um and Crompton 1990; Crompton 1992). Research findings confirmed that familiarity had a positive impact over the likelihood of revisiting a destination (Gitelson and Crompton 1984; Milman and Pizam 1995). In a study of psychometric typology, Plog (1974) presented the behavioural differences of both *psychocentric* and *allocentric* tourists: the former prefer familiar destinations and the latter novel and less-developed destinations. The findings of a research project demonstrated that individuals who had previous experiences with the same destination (or region) were more confident and more likely to go back since they felt more secure (Sonmez and Graefe 1998).

However, given the fact that tourists are offered a variety of destinations, it may sometimes be impossible to predict which one will actually be selected as the next vacation destination. Repeat visits may not be as prevalent a phenomena for tourism as they are for other businesses. Even where the destination fulfils tourist expectations, repeat visits may not be ensured. Some customers will undoubtedly look for similar but new experiences in different destinations, either in the same or in a different country (McDougall and Munro 1994). With tourism it is difficult to evaluate a holiday in advance (Zeithaml, Berry and Parasuraman 1993). For these reasons, positive word-of-mouth recommendation will be considerably more important and easier for a destination to achieve than gaining repeat tourists (Mountinho 1987; Ross 1993; Pizam 1994b; Beeho and Prentice 1997; Klenosky and Gitelson 1998). For instance, the results of research by Gitelson and Crompton (1983) reported that 74% of tourists had received travel information from friends and relatives whereas only 20% had referred to printed media such as newspapers and travel magazines.

Bearing in mind both the benefits and the caveats of measuring future behavioural intention, valuable implications may be provided for destination benchmarking studies as the level of these intentions is closely associated with either the level of

satisfaction or attitude or image perceptions or a combination of all of these. A low level of intention to return or recommend may indicate the destination has some problems, on the condition that other factors are held constant. The main questions to be asked are how likely tourists are to consider to come back either in the short-term or in the long-term and recommend their holiday experiences with the destination by assigning 'likely' and 'unlikely' likert scales (Gyte and Phelps 1989; Danaher and Arweiler 1996; Qu and Li 1997; Cho 1998). The level of repurchase intention was earlier presented by the Rover group as a benchmarking measure (Zairi 1996).

4.2.1.9. Intermediaries' Perceptions of Destination Performance

Tour operators, as a main supplier in the tourism industry, are considered as another input in destination benchmarking since they can provide an invaluable source of information about different destinations. As a consequence of developments in mass tourism over the last decades, tour operators have gained a considerable power in directing tourism demand and marketing tourist destinations. This means that, to a greater or lesser extent, the success of destination depends on tour operators (Carey, Gountas and Gilbert 1997). The major tourist-attracting destinations such as Spain, Turkey, Greece and Tunisia are more likely to have a relationship with tour operators in order to bring their tourism supply into the market. The large extent of the tour operators' involvement in the marketing of mass tourism destinations has forced national tourist offices and organisations to enter into a mutual undertaking with them.

Tour operators collect data about different features of destinations, grade accommodation facilities and sell each destination at the same or a different price depending on the quality of tourism supply in the destination and the attractiveness of the destination in the eyes of potential tourist groups. Tour operators have an opportunity to promote one destination and disregard others. This totally depends on the relationship between destinations and tour operators, and the tour operators'

perceptions of the destination (Ashworth and Goodall 1988; Goodall and Bergsa 1990). When any destination area begins to decline in the eyes of tour operators or any critical problem appears, there is a strong possibility that this destination will be excluded from the market.

Tourist literature is very important when choosing a destination as it is an important factor in the interrelation between tour operators and potential tourists (Goodall 1990). Tour operators have an obligation to offer the products and services they promised in the brochure. The major feature of brochures is to create expectations for quality, value for money and image of the destination before a holiday (Goodall and Bergsma 1990). Brochures are more important for first time tourists since without them, tourists may have no prior idea about the destination at all. This grading system in the brochure may additionally influence both the image of accommodation facilities individually and the destination generally (Goodall and Bergsma 1990). In addition, a few tour operators (e.g. TUI) have recently released a checklist in which every destination is evaluated according to its compliance with the guidelines (<http://www.wttc.org>). Destinations falling below standards are excluded from the list.

In the last few years, tour operators have begun dealing with customer complaints concerning inclusive tours. Many travel agents send a 'welcome home card' inviting their customers to talk about their holiday experiences and ensure they will remember the agent in the future after their return from holiday. For example, Direct Holidays distributes customer satisfaction questionnaires to every customer at the end of each holiday. Findings are used to assess accommodation, the holiday representative, overall enjoyment and car hire and to set standards for the quality of their future holiday plans (Seaton and Bennett 1996). Similarly, in reference to the researcher's personal observation, Airtours distributes a similar type of questionnaire to its customers on the way home to obtain feedback regarding their experiences with accommodation, the tour operator's services at the destination and satisfaction with the destination overall.

Given these and the fact that tour operators represent a large number of tourists, advice obtained from tour operators could be taken into account as part of the input while deciding how to improve the resorts. They can send feedback compiled with their customers' comments and/or complaints directly to destination management. The context of destination benchmarking could be further extended to include tour operators' own suggestions with regard to improving the performance of resorts or minimising existing complaints in order to give better service in succeeding years. This can be a good example to how external benchmarking works.

4.2.2. Analysis of Qualitative Measures

A summary of qualitative measures, discussed above, and their performance indicators are shown in Table 4.2. By using likert or semantic scales, or percentage values, four different methods can be recommended to monitor changes in the overall performance of the destination (internal benchmarking) and establish gaps (external benchmarking). These are explained in detail below.

Table 4.2. Qualitative Measures of Destination Performance

Criteria of Performance	Tools	Performance Indicators
Tourist motivations	◆ Mean scores	◆ Ranking of motivation items
Level of tourist satisfaction	◆ Mean scores ◆ Summary questions	◆ Ranking of satisfaction items ◆ Impacts of specific individual items on the level of overall satisfaction, intention to revisit and recommend
Level of tourist complaints	◆ List of complaints	◆ Ranking of complaints from highest to lowest ◆ How likely tourists are to complain about some specific attributes
Level of tourist comments	◆ List of comments	◆ Ranking of comments from highest to lowest ◆ How likely tourists are to consider some attributes to be improved
Level of tourist attitudes	◆ Mean scores ◆ Summary questions	◆ Ranking of attitude levels ◆ Impact of specific individual items on the intention to visit or revisit and recommend
Level of image	◆ Mean scores ◆ Summary questions	◆ Ranking of image levels ◆ Impact of specific individual items on the level of overall image perceptions, intention to visit or revisit and recommend
Repeat tourists' perceptions of changes in the destination	◆ List of positive and negative changes	◆ Ranking of positive and negative perceptions of changes in the destination
Level of future behaviour	◆ Intention to return and recommend others	◆ How likely tourists are to return and recommend
Intermediaries' perceptions of destination performance	◆ Summary questions	◆ Tourism suppliers' intention to promote the destination
Tourism suppliers' comments and complaints	◆ List of comments and complaints	◆ Ranking of comments and complaints from highest to lowest

Source: Own elaboration derived from the related literature.

4.2.2.1. Establish Gaps between the Destination and Competitors

The traditional approach to benchmarking is that a standard should be established to close gaps for benchmarking and that customers can be a source of information for establishing performance gaps (Zairi 1992; Smith *et al.* 1993; Bogan and English 1994; Cook 1995; Zairi 1996). The percentage of repeat business or the percentage of tourists expressing a satisfaction level of three or four out of a five-point scale are examples of customer-driven performance measures which can be used to compare one service encounter with another (Coker 1996). In reference to the potential use of gap analysis in benchmarking and its subsequent application into benchmarking tourist destinations (Bogan and English 1993; Karlof and Ostblom 1993; Madigan 1993; Min and Min 1997), mean or ranking scores can be compared with those of other destinations. Negative or positive differences are determined to be the gap between the selected destinations.

However, as emphasised in Chapter 3, the majority of customers may have experience of other destinations, and so are likely to make comparisons between facilities, attractions and service standards of other destinations (Laws 1995). In general, 'the choice of a particular good or service is the result of a comparison of its perceived attributes with the person's set of preferences' (Fishbein and Ajzen 1975 in Laws 1995: 113). Accordingly, it is argued that potential tourists select a destination amongst alternatives and evaluate each alternative considering its potential to offer the benefits they look for (Mayo and Jarvis 1981). As a result, in order to eliminate indecisive indications of customers' characteristics or to ensure that both sample destinations have a similar type of homogeneous customers in terms of multiple visits, external benchmarking research could be carried out by developing a direct comparison questionnaire. In so doing, destinations would be able to monitor their performance levels compared to those of others by obtaining feedback from those visiting multiple destinations including the one proposed as the partner. High scores would be potential areas where the destination meets its targets while low scores would be critical areas where the destination has to consider either raising its standards or leaving this market. The role of these two approaches

in activating the proposed qualitative measures is given, to a great extent, in Chapter 6.

4.2.2.2. Establish Gaps between Current and Past Years' Performance

This approach was introduced as the first examples of benchmarking in the manufacturing industry (Camp 1989). It refers to the measurement of internal performance and provides two methods to be addressed. First, once qualitative measures are calculated by transforming qualitative data into quantitative data, they should be kept recorded on an annual basis to ease the comparison process and monitor the direction of changes over a period. Findings could also be helpful for creating a database consisting of the analysis of customer feedback and how it changes. Second, repeat tourists can be chosen as the sample in order to learn how the destination has changed compared with their last visits and in what respects.

The examination of the overall performance of a destination compared to the previous years may potentially support the success of the destination benchmarking study in a process which aims to make a comparison with other destinations. Meanwhile, a destination might measure its annual or periodic performance level by comparing and contrasting the current results relating to tourist satisfaction and complaints to the latest results in the previous period. Since benchmarking is a continuous measurement and analysis process, the destination could gain much benefit from understanding whether any positive or negative results appear on the sustainability of a destination's performance relating to different qualitative items. This type of qualitative measurement method requires the establishment of a database where findings are accurately recorded and comparisons are made with previous months or years. This method has been put into practice by a few tourist boards in England (Thomason *et al.* 1999a, 1999b) and by the Department of Tourism in Mallorca (Govern Balear 1999). Testing of this approach is not within this research's objectives as it requires a continuous procedure.

4.2.2.3. Express Standard Values

In this approach, authorities may express a desired level of any standard values out of a certain point scale and then benchmark against them (Hutton and Zairi 1995; Balm 1996). For example, the desired standard value is assigned as 'five' out of a seven-point scale. The areas with higher values would be regarded as above the targeted performance or at the desired level and do not need to be improved, but those with lower values would be regarded as failing to reach. These areas need to be improved until the desired level (standard value) is reached, e.g. 'five' in this example. Alternatively, the highest scale value can be nominated as the best standard value, e.g. 'seven' out of a seven-point scale. The objective could be set to reach that value in the desired areas by monitoring changes in perceptual performance of products and services and administering periodic surveys despite the fact that it is hardly possible to achieve a one-hundred percent performance. This approach is also a kind of internal benchmarking. In its internal benchmarking programme, for instance, the London Hilton on Park Lane has identified its own standards for each department. Launching 'Yes, We Never Say No' motto, it encourages employees to achieve these standards by providing them with awards such as the best employee of the month or bronze, silver and gold prizes (BBC2, 15.12.1999).

4.2.2.4. Use of Multivariate Statistical Tests

Multivariate statistical tests are used when there are multiple variables and a relationship between dependent and independent variables needs to be examined (Johnson 1998). It is the strength of these tests to demonstrate the most powerful factors or attributes in a multiple variance analysis. With their features offering a variety of attributes as a part of the chain to complete the tourist experiences, the overall performance of tourist destinations on the basis of several criteria could be measured with the assistance of multivariate statistical models or tests. As a contribution to the assessment of internal benchmarking of destinations, the impact of each individual destination attribute over the summary questions (overall image,

overall satisfaction, overall attitude, intention to recommend or intention to visit a destination) defined as the overall performance measures could be identified by employing a series of advanced statistical tests such as factor and multiple regression analysis. This could demonstrate the method for measuring the internal performance of the destination. The most powerful factors could be accepted as elements of competitive advantage and those which are important to customers while the rest would be those which need to be developed or reassessed.

This method has already been applied into the marketing literature (Oliver 1980; Richins 1983; Oliver and Swan 1989; Woodside, Frey and Daly 1989) as well as in the tourist satisfaction literature (Geva and Goldman 1991; Dube, Renaghan and Miller 1994; Cho 1998; Weiermair and Fuchs 1999; Choi and Chu 2000). The rationale for this type of application is the possibility of avoiding economic, demographic and psychographical differences between those who visit two individual destinations as the performance of each destination is evaluated with its own customers. The operationalisation of this approach is explained in Chapter 6.

4.2.3. Quantitative Measures

There are a number of criteria to assess the performance of tourist destinations on the table of competitiveness; however, this study attempts to consider only major indicators. These are the volume of tourist arrivals, the volume of repeat tourists, the volume of tourism receipts and the share of tourism receipts in Gross National Product (GNP), tourist expenditure (per person or per group) and its distribution, annual occupancy trends and average length of overnight stays. These key quantitative indicators are explained in detail below.

4.2.3.1. Volume of Tourist Arrivals

As a traditional approach, the number of foreign arrivals has been used to rank all destinations (or countries) on the league table. The idea is that the higher the num-

ber of annual tourist arrivals, the higher the destination's place in the competitiveness set. The performance of a particular destination or region is also examined by evaluating the percentage changes over the total number compared to the preceding years. For instance, according to the WTO's traditional ranking style of destinations, China was ranked fifth in receiving most tourists in 1996, while it was twelfth in 1990.

Though this method has been used by leading tourism organisations, primarily the WTO, over many years, it has several weaknesses including the difficulty of collecting reliable data and of anticipating the future. The number of people taking vacations overall may vary from one year to another. Compared with the previous year's records, numbers tend to increase if the international economic, political and social indicators are positive. They tend to decrease if these factors are negative. Consequently, the number of arrivals in a specific destination has a possible increase if the international trend is upward, but this may not be important in order to draw a strong conclusion about the position of that destination from these figures. The proposed method in this study refers to the calculation of the percentage share of arrivals at the destination out of the actual annual international tourism demand. The findings could show how well the destination contributes to international tourism on the basis of the volume of foreign tourist arrivals. Trends in these percentage values would also indicate how the destination performs in comparison with previous records as well as with other destinations.

4.2.3.2. Volume of Repeat Tourists

The benchmarking literature suggests the consideration of the percentage of repeat customers as performance measures (Kasul and Motwani 1995; Zairi 1996). The basic idea of this approach is that the higher the number of tourists returning to the same destination, the higher its status in the market. The way to identify repeat visits as an indicator of performance measurement is two-fold: (1) the percentage of those who had made previous visits and their frequency and (2) the percentage

of those who are likely to come back in the future. The latter has been explained as a part of qualitative measures. These findings might be interpreted overall and by nationality of tourists compared to the destination's previous years' records as well as those of other similar destinations.

The analysis of the extent of repeat visits can lead to several benefits such as lower marketing costs, a positive image and attitude towards the destination and an intention to tell others (Fornell 1992). However, according to one approach, a high level of repeat visits is not a panacea since it will not necessarily offer the destination a competitive advantage over similar destinations (Oppermann 1999). In other words, repeat visits could be a problem as well as a strength. For instance, some mass tourist destinations such as the Spanish islands (the Balearic and Canary Islands) attach themselves to Plog's (1974) psychocentric tourist typology by attracting a high proportion of repeat tourists, with their low level of income and the tendency to prefer mostly package tours, from European countries.

4.2.3.3. Volume of Tourism Receipts

The quality of tourists could be more important than their quantity to the success of any destination. For example, considering the expenditure level of each tourist could be more rational than considering the number of tourists in determining how tourism can provide benefits for the destination. Thus, the notion that the greater the number of tourists, the greater the net income generated by the local economy sometimes cannot be supported due to some destination- or demand-based reasons such as inflation rate, length of stay or low level of income groups (Syriopoulos and Sinclair 1993). In that case, the volume of total tourism receipts yielded from international tourism could be an indicator of the measurement of destination competitiveness, since the more the amount of tourist spending, the higher the multiplier effect within the local community (Bull 1995). A variety of local people and organisations benefit from a unit of tourism income due to its high multiplier effect

in the economy. The President's Commission on Industrial Competitiveness in the US defined the term competitiveness as

the degree to which a nation can, under free and fair market conditions, produce goods and services that meet the test of international markets, while simultaneously maintaining and expanding the real income of its citizens (cf. Kotler *et al.* 1993: 316).

According to this definition, it is clear that the local economy must gain a net benefit from international tourism activities while asking if the destination is competitive and if it is, to what extent. Any development in a particular tourism industry is recorded as a direct contribution to GNP. The comparison analysis on the basis of the proportion of tourism incomes within GNP between more than two destinations will show which destination is yielding more benefits from international tourism. There are few examples in the benchmarking literature using total revenues or profits as an example of quantitative measures. Of these, Morey and Dittmann (1995) benchmarked total room revenues and gross profit of hotel businesses as an element of quantitative measures.

4.2.3.4. Level of Tourist Expenditure and its Distribution

The volume of actual tourist expenditure is considered as a part of market segmentation variable in tourism (Pizam and Reichel 1979; Legohérel 1998). The level of tourist expenditure and its effective analysis could be an indicator of illustrating the profile of tourists visiting one destination, and the extent to which they tend to spend much more while on vacation. For instance, recent research findings show that overseas travellers whose prime travel purposes to the US are to visit cultural attractions such as museums and national parks are likely to spend more time and money during their trips than other groups (Judith 1999). Results of an investigation including the amount of actual tourist expenditure could help destination management decide the type of tourism product they will offer and the type of tourism demand they intend to attract. As a result, a partner could be chosen among desti-

nations which attract both higher spending tourists and lower spending tourists in order to illustrate differences and their sources. If any destination is working with a higher volume of tourist arrivals but with lesser actual tourist expenditure and tourism receipts, this means that it is rapidly moving towards becoming a mass tourism destination and needs to take precautionary action (Butler 1980).

The methodology to be chosen to understand the performance of destinations on the basis of the level and the distribution of tourist expenditure while on vacation is to calculate the average volume of spending per tourist or per group or per family (Mak *et al.* 1977; Lawson 1991; Spotts and Mahoney 1991). The other method could be to categorise tourists into several groups such as lower, medium or higher spending (Pizam and Reichel 1979; Spotts and Mahoney 1991; Legoherele 1998). The use of these methods can be extended to include the distribution of spending for each tourism product and service, e.g. accommodation, food and beverages, transport and so on (Fujii, Khaled and Mak 1985; Lawson 1991; Spotts and Mahoney 1991; Pyo, Uysal and McLellan 1992; Haukeland 1996; Legoherele 1998; Hong, Kim and Lee 1999). The distribution of tourist expenditure over the destination products and services illustrates which parts bring more revenue as well as the characteristics of tourists. It is also important to understand the demographic profiles of tourists and explore their impact on how much tourists intend to spend at any destination (Legoherele 1998; Hong *et al.* 1999; Perez and Sampol 2000).

4.2.3.5. Annual (Seasonal) Occupancy Trends

The assessment of annual or seasonal occupancy trends as an overall destination benchmark also has a potential benefit to help to design future management strategies. Understanding seasonal fluctuations clearly will help pricing off-peak and high-peak times in order to try and sustain a certain level of occupancy over the year, e.g. 80%. This may decrease trends for the following year(s), but may stimulate the destination to attract more tourists as each new tourist will contribute to the accumulation of tourism receipts. The lower level of any occupancy trend, to

some extent, signals that there is no need to increase in the number of beds at this destination. The comparison of periodical occupancy trends either with previous years or other destinations may demonstrate how effectively the destination(s) is using its resources and whether it needs to take further action. This type of benchmark was used for individual hotels by Morey and Dittmann (1995) in the tourism literature.

4.2.3.6. Average Length of Overnight Stays

This type of quantitative measure could provide destinations with some advantages such as giving tourists an opportunity to have more experiences at the destination and positively influence the amount of money they spend on vacation. Findings of previous research confirmed that there was a direct relationship between the average length of overnight stays in a place and the amount of tourist expenditure (Spotts and Mahoney 1991; Mules 1998). The latter increases with the former. Since the longer the tourists choose to stay, the more likely they are to become aware of facilities and services both where they are staying and in the surrounding area. This will widen the size of the multiplier effect of tourism revenues at the destination. The length of vacations may also reflect the attractiveness of a destination, however a number of other important factors may also influence length of vacation such as the availability of free time, the availability of flexible package tour deals and the level of prices.

4.2.4. Analysis of Quantitative Measures

A list of self-selected quantitative measures introduced above is shown in Table 4.3. As benchmarks for tourist destinations, these measures could be examined in particular ways, e.g. by nationality and season or by comparison with other destinations. This type of assessment helps to measure the real performance of destinations for each category on the basis of, for example, the share of tourist arrivals,

the volume of repeat tourists, the level of tourist expenditure and the length of overnight stays.

To Interpret the statistical data arising from the quantitative measures, Bloom (1996) proposes the use of internal and external measures. These can be used to analyse the overall performance of the tourism industry in a destination. As noted in Chapter 3, the measurement of external performance is regarded as the comparison of the tourism position of one destination to the position of a similar or competitor destination (external benchmarking). The destination outperforming the other is considered to be superior. The measurement of internal performance is examined as monitoring the tourism position of one destination based on performance targets set by the responsible authorities in their plans (internal benchmarking). This also could cover the analysis of the current position to that of previous years. For example, the consideration of the market share is mentioned as a measure of benchmarking (Mann *et al.* 1999). Its comparison to other destinations will be an example of external measures whereas its comparison to previous years' figures of the same destination will be an example of internal measures.

Table 4.3. Quantitative Measures of Destination Performance

Criteria of Performance	Tools	Performance Indicators
Volume of tourist arrivals	Statistical figures	◆ Proportion of tourist arrivals in regional and international tourism
Volume of repeat visits	Statistical figures	◆ Frequency of repeat tourist arrivals ◆ Proportion of repeat tourists in total tourist arrivals
Volume of tourism receipts	Statistical figures	◆ Proportion of tourism receipts in regional and international tourism ◆ Proportion of tourism receipts in GNP
Level of tourist expenditure	Statistical figures	◆ Amount of tourist expenditure per person or per group ◆ Distribution of tourist expenditure by categories
Annual occupancy trends	Statistical figures	◆ Occupancy rates of accommodation establishments by year and months
Average length of overnight stays	Statistical figures	◆ Average length of tourists' overnight stays (in nights)

Source: Own elaboration derived from the related literature.

Depending upon the homogeneous or heterogeneous structure of tourism demand through a destination in terms of nationality, potential assessment subjects include the comparison of tourists from different countries. A separate database could be created for each market group to carry out the assessment individually. Findings

could then be compared with those of previous months or years or with those of other destinations. This may indicate how well the destination performs with each market group and illustrate differences between current and past figures and between high and low seasons and provide a background to speculate on the reasons for any differences. This type of analysis has been used by benchmarking literature to monitor changes in operational performance from one year to another (Zairi 1998). If historical data is included in the database, it can also potentially be used to predict future trends by using a series of advanced statistical tools such as time series or regression models (Hair *et al.* 1995).

Alternatively, referring to the principles of internal benchmarking, as applied by many national planning organisations, overall standard target values could be designated and all the efforts could be aggregated to reach the desired performance level at the end of the year. For example, an estimated number of tourist arrivals or a certain amount of tourism revenue expected either in the following year or in the next five years as a part of short-term planning and their classification into a first-time and repeat tourists. When the estimated target values have reached or exceeded the actual values, these will be credited as improvements. In spite of its benefits for setting objectives and measuring the internal self-assessment performance, this method needs to be assessed cautiously because of the possible tendency to identify the estimated future performance value at a lower or much higher level.

Overall, developments in hardware and software computer systems have facilitated the creation, distribution, analysis and storage of a great amount of data. This brings several benefits for destination benchmarking: the analysis of data either by using basic or advanced statistical tools and storage of data on the database to be used in the long-term. The findings might be interpreted separately for each tourism supplier and tourist group from different countries of origin and from different market segments taking into account age, income, education and number of repeat visits, where possible. Findings could be further analysed and kept on record by creating two categories such as low and high seasons. Comparison between low

and high seasons would also be a good benchmark for the destination itself to observe changes and estimate their potential reasons. This research will not attempt to test this approach because it requires carrying out practical and continuous procedures.

4.3. Summary

This chapter has provided the ground on what kind of measures can be developed and how they can be applied to tourist destinations from the perspective of internal and external benchmarking. The proposed measures in this study, referring to the assessment of both internal and external performance of tourist destinations, are believed to foster the overall performance of destinations by identifying their own performance, gaps with others and competitive positions. Although the list of measures can be increased both in terms of number and methods, this study will be limited to testing of some self-selected measures due to time constraints. Due to similar reasons, the next chapter will only address the importance of national or international-based quality and eco-label systems in performance improvement and their possible applications in benchmarking tourist destinations, as a type of generic benchmarking tools.

Chapter Five

Generic Destination Benchmarking

5.0. Introduction

Beyond the level of customer services on the demand side and infrastructure on the supply side, the existence of quality grading and environmental management is viewed as a part of national or international generic benchmarking enablers that are supposed to make contribution to the host destination externally. By applying these enablers, individual organisations and destination management could improve existing products and services and, if necessary, identify ways of developing new ones, which could also lead to a better demand-supply relationship with customers and retailers. The main objective of this chapter is therefore to introduce existing or proposed quality grading and eco-label systems as a form of generic benchmarking. How benchmarking, linked to external awards and grades, can offer advantages and bring about improvements in competitiveness for destinations are also discussed. The chapter ends with recommendations to develop such systems in accordance with the measurement and improvement of overall destination performance and their limitations.

5.1. Short Review of Quality Systems

Examples of national or international quality grading systems can be given from ISO9000, Baldrige Quality Award, European Quality Award and hospitality grading and classification systems. Some of the broad objectives of quality grading systems are (1) to promote quality awareness and improve performance practices and capabilities; (2) to serve as a working tool for managing performance, planning, training and assessment; and (3) to facilitate communication and share best

practice information about successful quality strategies and benefits (Garvin 1991; Woods and King 1996). All these objectives are also a part of what benchmarking studies aim to provide. Some of these systems are already suggested as a measure of performance improvement through benchmarking (Vaziri 1992; Sunday and Liberty 1992; Tang and Zairi 1998a, 1998b; Kozak and Rimmington 1998). In the benchmarking literature, organisations always need a partner with which to exchange ideas or from whom to get feedback about better or new practices. This partner can sometimes be another organisation in the same or a different industry. In the case of common guidelines launched as the best practices and believed to be valuable for organisations to reach objectives, the criteria to achieve awards can act as an external comparator, instead of another organisation or destination. By taking their existing procedures on board, further improvements can be made by the organisation or destination.

5.2. Short Review of Environmental Quality Systems

The relationship between tourism and environmental degradation is complex. One commentator might say that tourism development brings environmental problems (Gunn 1997), whereas another suggests that tourism helps preserve the natural and cultural heritage, as it contributes to the local economy (McIntyre 1993). The close relationship between these two phenomena cannot be underestimated; therefore, the only option might be to develop new strategies for gaining sustainable benefits from environmental resources. Both industry and non-industrial organisations have recently focused their attempts upon the practical application and implementation of a variety of guidelines, checklists and policies to safeguard and promote the cultural and natural resources of tourist destinations. Consequently, a variety of eco-label systems have been established. One simple definition of eco-labelling is

an effective market-based instrument, capable of reducing the negative impacts of tourism products, production methods, services and processes on the environment, whilst at the same time improving the environmental quality of tourism places (Mihalic 1998: 33).

The introduction of eco-label systems and their application in the tourism industry dates back to the early 1990s. These are aimed at minimising the negative impacts of tourism development and continuously improving the environmental quality of tourist destinations. Attention is drawn to the importance of eco-labelling in tourism for improving the ecological quality of products and maintaining competitive advantage. Eco-labelling in tourism considers all the tourism products, hotels, restaurants, tour operators, travel agents, leisure parks and so on, and refers to a wide variety of awards. Among those which are relevant to holiday destinations are British Airway's Tourism for Tomorrow, Green Globe, Blue Flag, TUI's Guidelines for Environmental Management. Some others are relevant to individual organisations, e.g. ISO14001, Green Leaf, Tourfor as well as guidelines developed by local tourist boards such as the Scottish Tourist Board, the Costa Rican Tourist Board, the Tourism Council of the South Pacific and the Caribbean Tourist Board (WTO 1993; Stephens 1997; Farrell 1998; Smith 1998).

Mihalic (1998) provides some indicators of eco-label systems in tourist destinations: hotels which pay attention to minimising the harmful affects of tourism on the environment, travel agencies which offer special discounts for tourists who are likely to use public transport or who print their catalogues on recycled paper. Some of the destination criteria used by eco-labels are sea water and beach quality; access to beaches; water supply and water-saving measures; waste water disposal and utilisation; solid waste disposal, recycling and prevention; energy supply and energy-saving measures; traffic, air, noise and climate; landscape and built environment; nature conservation; animal welfare; environmental information; and environmental policy and activities.

The common relationship between eco-label systems and benchmarking is that the former is used as an example of the best practice benchmarking towards achieving continuous improvement of environmental quality. There are a number of examples of this practice. The European Union encourages the use of the 'blue flag' strategy at coastal resorts. As a part of its policy for responsible tourism, the Africa Travel

Association has released a set of guidelines to minimise visitor impact on wildlife, local culture and community (<http://www.wttc.org>). The European Tour Operators Association delivers guidelines to its members requesting them to be sensitive towards the natural and cultural environment in the local community and recommending their customers to behave in the same way (<http://www.wttc.org>). The International Hotel and Restaurant Association aims to assist its members in delivering services with best practices (<http://www.ihra.org>). Surely, the main objective of all these tasks is to deliver better services, ensure that customers are satisfied while at the same time minimising the impact on environmental resources.

5.3. The Rationale for Generic Destination Benchmarking

As noted in Chapter 2, benchmarking is a way of learning good practices from higher achievers in the same market. Although the benchmarking approach requires a partner to carry out the study, it is also evident that some guidelines and standards identified by public and voluntary organisations could be regarded as input in an external benchmarking exercise. Camp (1989) emphasises the importance of such associations in gathering data about the practical applications in a particular industry. Guidelines, eco-labels and quality grading systems could therefore be useful for enhancing standards in the tourism industry. As benchmarking is a continuous process, destinations and their elements such as hotels, restaurants and beaches might identify ways of improving the environmental and service quality of their facilities. Some of the benefits derived from such a benchmarking application might be:

- ◆ exploring and meeting customer needs
- ◆ establishing effective goals and objectives
- ◆ becoming aware of best practices
- ◆ enhancing competitive position in the market.

There is a close relationship between benchmarking and competitiveness with the former being expected to bring about the latter (Camp 1989; Balm 1992; Shetty 1993; Zairi 1994, 1996; Elmuti and Kathawala 1997). In this sense, quality grading and eco-labelling systems, as elements of generic benchmarking applications, might be able to improve competitiveness in different ways. Each way is explained in detail in the following paragraphs.

5.3.1. Helping Customers Choose Destinations

Consumer behaviour literature suggests that tourists mentally categorise destinations. One proposed categorisation is into 'consideration' (evoked), 'inert' and 'inert' sets (Woodside and Lysonski 1989). The 'consideration' set includes all destinations that a customer is aware of and might possibly visit. The 'inert' set represents all the destinations that the customer is aware of but has no plans to visit within a specific period. Finally, the 'inert' set refers to destination (s) that the customer is aware of, but has no intention of visiting within a specific period. According to Um and Crompton (1990), tourists are expected to select a destination from a set of alternatives in the 'consideration' set, based on their attitudes or image perceptions. When tourist select a destination for their holiday, competing tourist destinations lose potential business. This demonstrates the importance of customers' awareness and familiarity with the destination, alongside the marketing potential of the destination management for taking a place in the consideration set. In the majority of destination choice models, awareness takes place as the primary stage for a customer to begin a choice process (Crompton 1992). In the evaluation of alternatives in the late consideration set, constraints associated with each of the alternative destinations become more influential (Crompton and Ankomah 1993).

Success in achieving quality grading or eco-label status and approval by an expert committee brings international recognition. In such a case, signs and symbols could help communicate with potential customers about the quality. The better the symbol is understood by users, the better it may work. Eco-labels could be used as an

effective tool to make potential markets aware of a destination's environmental quality and influence choice within the consideration set. Research findings have confirmed that environmental considerations have become a significant element affecting destination choice decision. For example, about 50% of German tourists consider environmental quality issues while choosing a destination for their vacation (Ayala 1996). This could be a sign of a potential increase in the bargaining power of customers in the future once they become familiar with the use, meaning and benefits of quality grading and eco-label systems. In other words, customers might give priority to destinations containing such labels and paying attention to raising service and environmental quality standards.

Moreover, the quality of environmental resources has become an important part of destination development, competitiveness and tourist motivation (McIntyre 1993). As a result, any satisfaction or positive attitude or image which appears after a vacation at a particular resort is likely to stimulate subsequent visits and word-of-mouth recommendation (Peter and Olsen 1987; Oliver and Swan 1989; Mill and Morrison 1992; Ross 1993). This may bring the first-time visitors from the unawareness set directly to the awareness set. Those who had favourable experiences will probably be more likely to return. Similarly, those who had a negative attitude or image towards a destination are likely to have less intention to visit and/or re-visit, but a stronger likelihood not to recommend personally (Goodrich 1977, 1978; Mayo and Jarvis 1981; Um and Crompton 1990). For instance, as a result of widespread negative images of the environmental issues (degradation), Mediterranean destinations have begun to lose their popularity in the European market. This leads to a lower percentage of tourists and tourism receipts of total international tourism movements compared to the preceding years.

5.3.2. Improving Consumer Awareness

Moving from the role of expectations in the theory of customer satisfaction measurement (Cardozo 1965; Oliver 1979; Cadotte, Woodruff and Jenkins 1987;

Parasuraman, Zeithaml and Berry (1985, 1988, 1991), it is necessary to learn about customers' expectations from a particular element of a destination. All quality grading and eco-label systems are designed to convey information to the customer about the type of facility a destination has and provide the balance between what tourism establishments require and what customers expect. Such standards offer a variety of benefits such as improving quality, building a different image to use for promotion and advertising. One of the objectives of these systems is to convince customers that the quality of products and services provided by a supplier will meet their requirements. When guests arrive at a destination, they might want to see varied menus, clean rooms, streets and beaches, and helpful and informative staff. If customers have initial information about the items of each system or have previously been to a similarly graded resort, then they may expect the destination to have facilities and services to meet their expectations and needs. For instance, if tourists observe one destination with a clean environment and beaches, then they would expect other destinations to have a similar performance. Where this is not the case it may give rise to negative experience and dissatisfaction. This might influence the overall performance of destinations in return.

5.3.3. Learning about Best Practices

As emphasised earlier, the prime purpose of carrying out benchmarking studies is to learn about best practices from other counterparts and the way to achieve them (e.g. Camp 1989; Geber 1990). The standards set by quality and eco-label systems offer simple examples which can be used to explain how such initiatives could form a basis for destination benchmarking. Guidelines towards best practice are, of course, available to members of the tourist industry. Such guidelines provide feedback on ways of improving or what to do to reach these standards. These could help destination management to access external ideas and practical methods. Like individual organisations gaining the Baldrige Awards, international tourist destinations could also get some feedback about their performance levels. These could be one aspect of applications which make destinations better and more competitive.

One of the main difficulties in benchmarking is to find a proper partner. Additionally, grading schemes are perishable and time-sensitive, as is benchmarking. Thus, the organisation will be monitored and inspected regularly in order to identify whether it has improved or worsened or remained at the same level. Kozak and Rimmington (1998) therefore suggest the use of external awards (e.g. Welcome Host, Merit and Investors in People) and hospitality grading systems (e.g. AA, RAC, ETB, STB) as examples of benchmarks which use good practices as criteria for assessment to offer advantages and bring about improvements in competitiveness for both small hospitality businesses and tourist destinations. As quality grading and eco-label systems are accepted as the best practices that organisations or destinations must consider as examples within their field, they could be taken as sources of information. Grading systems clearly identify the best areas in which organisations should perform. For example, the minimum bed sizes, the availability of equipment in bedrooms such as table, electric sockets, TV, radio and smoke alarms might be regarded as some of the best tangible benchmark elements for a hotel organisation. Clean bed lines, access to double beds from both sides, attending to customer complaints, offering breakfast, dinner or room service, and general cleanliness will be the intangible benchmarks that help hotel management learn how to improve its services.

5.3.4. Sustaining Continuous Improvement

Benchmarking requires continuous attention to fulfil the targeted performance improvement (Camp 1989; Balm 1992; Codling 1992; Vaziri 1992; Watson 1993). The aim of quality grading and eco-label systems is to sustain continuous improvement, which is also the aim of destination benchmarking. The practical procedure of quality grading and eco-label systems could therefore be accepted as a kind of continuous benchmarking measurement as they are given annually and renewed or revised periodically, provided that the criteria in the pre-identified guidelines are still being met. The awards or labels may be lost if the organisation or the destination fail to fulfil the criteria at any time during the year. The external sys-

tems such as quality systems, eco-labels and guidelines could play a greater role in raising awareness of the importance of benchmarking in continuously improving the quality of services and environmental resources. When such generic measures are taken into account as a sample case for maintaining performance measurement and improvement, destinations or their individual organisations may be able to understand how closely they are following guidelines identified as the best practices. The size of the gap may be revealed by the review scores. In an empirical study among tourism managers and authorities in Greece, Spachis (1997) found that tourism authorities believe that quality grading or eco-label systems are necessary as they make a great contribution to the improvement and upgrading of the product itself and of the services offered.

5.3.5. Identifying Critical Success Factors

The significance of quality grading and eco-label systems is that they ensure the minimum standards of services and facilities offered by businesses and local authorities at the destination. Such systems could therefore be taken as critical success factors which are important in determining the strengths and weaknesses of the destination in general and its facilities in particular. Candidates are provided with checklists from which they can identify the extent to which their operations comply with the code of practice and pinpoint which practices are in need of improvement. Destination managers may be interested in new ideas, and benchmarking helps in identifying not only which areas of performance need most attention but also how much improvement can be recorded (Coker 1996). Here, critical performance indicators such as guest comments, customer feedback and repeat business may enable destination managers to evaluate their performance levels and take further action for improving their service levels. Some of the critical success factors to be regarded as benchmark elements as a main part of classification and grading standards are a welcoming attitude, friendliness, customer care and attention, atmosphere and environment, quality of food and drink, hygiene and sanita-

tion, safety and security, level of service, tourist information and furnishings or furniture.

5.3.6. Measuring External Performance of Destinations

Each separate aspect is monitored by a panel of inspectors. Their observations may be helpful for organisations who wish to improve their standards or achieve a higher grade. In awarding quality grading or eco-label schemes, assessment is made in a variety of areas depending on the nature of the organisation or destination. An organisation reaching a certain total of the maximum score is awarded a grade ranging from one to five stars, or for example, a blue flag, ISO9000 and so on. Some quality grading or eco-label systems are awarded following successful completion of a comprehensive audit examined by an external body recognised by the national or regional certification institution, e.g. ISO9000, ISO14000 and blue flags.

Sometimes an outside body establishes criteria which have to be met, e.g. TUI or the German Travel Agents' Association. The findings indicate a destination's success in the market (<http://www.wttc.org>). These are examples of an external destination benchmarking study. The destination authority has the advantage of obtaining feedback from external organisations about the actual or the desired performance. Once an award has been won, the results of quality-based or environmental efforts are evaluated periodically and audits are conducted to ensure development continues, which is the main purpose and feature of benchmarking. As a result, management has to sustain its performance level and reinforce itself in line with developments in the industry.

5.3.7. Establishing Networks with other Members

When an organisation or destination has problems with any environmental issue, it can get further information to resolve it either by contacting the organisation sup-

plying quality grading or eco-labels, by applying its guidelines in practice or by arranging partnerships with other organisations experiencing similar problems. By becoming members of the Green Globe or Blue Flag, for example, destination authorities have an opportunity to get advice and to exchange ideas and experiences with other colleagues. These connections are accepted as a 'benchmarking network'. Such networks could provide several other benefits such as learning from the experience of others. Green Globe, for example, firstly examines existing policies and practices; and then provides guidelines and targets to be followed. The list of guidelines called the 'Green Globe Annual Review', includes case studies from other members. These may stimulate destination managers to develop new policies and reset its targets. It can simply adapt case studies to suit their own structure.

5.3.8. Cost Minimisation

Improved productivity and efficiency through quality or eco-label systems may result in reduced production and marketing costs and increased customer satisfaction. Less money spent at production leaves more to be spent on service standards and marketing activities. Money can be saved on research and development projects as a result of guidelines provided by such systems. With specific reference to the use of eco-labels, the implementation of environmental programmes and eco-labelling systems to minimise waste and save energy not only creates a better and cleaner environment, but may also enhance competitiveness with similar destinations, due to the underlying significance of cost minimisation in marketing services.

Efficient use of natural and economic resources lessens costs and increases net profits (Porter 1985). For example, an environmental protection project in the Caribbean attempts to reduce the consumption of water and electricity in the green hotel industry. This is expected to bring reductions in operating costs and efficient use of natural and mechanical resources (Smith 1998). The reduced costs can then be passed on to visitors, which in turn makes the destination more attractive. There are a number of recommended methods to mitigate pollution and reduce the deple-

tion of natural resources. These include recycling paper, reducing the consumption (use) of disposable materials, efficient use of the energy and water supply, being economical (<http://www.wttc.org>). Some places such as the Balearic Islands are short of water and electricity. As long-term and expensive investment projects are needed to solve this problem, they consider either building new plants or borrowing from neighbouring countries. As water and an energy source are essential for holidaymakers, their lack may be a serious disadvantage.

5.3.9. Providing Self-Monitoring

Quality grading and particularly eco-label systems, could be a symbol of self-monitoring appearing among tourists, intermediaries and suppliers. A new breed of tourists wants to spend vacations in an unspoiled place, and expects intermediaries to recommend the most appropriate destinations. As a result, intermediaries require tourism suppliers to pay attention to the preservation of the natural and cultural resources they supply and benefit from. Since most tours are booked through travel agents, tourist resorts have to meet the criteria demanded for inclusion in travel catalogues. If resorts do not meet expected standards, customers may be advised to avoid them. As a final stage, tourism suppliers and destination authorities provide several guidelines about how they expect customers (users) to behave and how to use resources without damaging the environment, e.g. keeping beaches and streets clean, keeping equipment at hotels safely and saving energy and water.

5.3.10. Positive Impact on Society (Local Community)

The assessment of quality grading or eco-label guidelines and their implementation in practice is important not only to tourists but also to the local community. The European Business Excellence Model, for example, considers 'the impact on society' (local community) as the eighth criterion for achieving quality standards. In a tourism destination context, this criterion requires measuring and assessing the impact of tourism development on environmental resources. This includes such ele-

ments as natural resources, energy and safety. The better the outcome the more the local community will be satisfied. As environmental consumption is a continuous process, its management must also be continuous so that future generations will inherit an unspoilt environment.

5.4. An Overview of Generic Destination Benchmarking

Demands for better service and environmental quality at tourist destinations are rapidly increasing. Destinations therefore need to achieve a better overall level of performance in order to be competitive. Both quality grading and eco-label systems can act as external enablers that indirectly influence the performance level of tourist establishments in particular and destinations in general because these systems and benchmarking have common features such as providing guidelines on how to improve performance, seeking best practices and requiring a continuous process to ensure continuous improvement and a better image. As these various systems also have valuable roles to play in bringing about improvements in tourist destinations, they could be accepted as benchmarks indicating how the relevant organisations are performing against various standards.

As Table 5.1 shows, there is a distinction between quality grading and eco-label systems in terms of the type of sample to be aimed for. Quality grading systems seem to address solutions for performance improvement mostly in individual organisations whereas eco-label systems are partly destination-based. Another instance is that the former often refers to the use of qualitative measures such as the appearance and behaviour of staff, quality of facilities, atmosphere and customer satisfaction. Conversely, the latter systems focus mostly on quantitative measures such as water and electricity supply and consumption, recycling, waste water generation per room, provision of equipment, level of water and air pollution and so on. Therefore, although it still seems to be feasible, an alternative option might be to develop a more comprehensive quality system which will address tourist destinations overall by combining these two systems.

Table 5.1. Quality and Environmental Management Systems

Systems	Area	Applied For
Quality Grading		
ISO9000	International	Individual Organisations
Baldrige Awards	USA	Individual Organisations
European Quality Award	European	Individual Organisations
Hospitality Systems	National	Individual Organisations
Environmental Management (Eco-label)		
TUI's Guidelines	International	Individual Organisations/Tourist Destinations
ISO14001	International	Individual Organisations
European Blue Flag	European	Tourist Destinations
Tourfor Award	European	Individual Organisations
Green Globe	International	Individual Organisations/Tourist Destinations
Local Guidelines	National	Individual Organisations/Tourist Destinations

Source: Own elaboration

Although generic benchmarking suggests that individual organisations or destinations should look not only at others in the same industry but also best practice recognised in the national or international arena (Cook 1995; Breiter and Kliner 1995), the problem with such applications is that there are a variety of national and international quality award and eco-label systems. It is difficult to know which one to follow. The solution could be to establish an individual quality award and eco-label system by utilising the existing applications and considering each country's or destination's own features. The literature review revealed that there are no particular quality grading systems devoted to identifying the broad picture of tourist destinations although the evidence given by some tour operator guidelines such as TUI has the potential to be developed further. The existing hospitality classification and grading systems are limited to guidelines for increasing physical and service quality within accommodation establishments and dining services as the eco-labels comply with specific guidelines for maintaining environmental quality standards.

A broad application of generic benchmarking at tourist destinations could possibly include overall standards pointing out their physical, service and environmental quality levels produced in accordance with the guidelines of the existing national or international systems of which some characteristics are summarised in this chapter. These could be made up of both qualitative (e.g. how to carry out processes and how to behave towards tourists or serve them) and quantitative measures (re-

sponses to questions such as how much, how long, how many and so on, e.g. time and productivity). The required data could be collected from actual experience and outcomes to form broader performance standards and measures. This responsibility could be taken by the WTO, WTTC or a similar organisation in a collaboration with national or regional tourist boards to keep records, establish outputs and monitor changes.

5.5. Limitations of Quality Grading and Eco-Label Systems

In spite of their potential benefits, the existing quality grading and eco-label systems have several limitations. First, in terms of the importance of quality grading and eco-label systems in selecting tourism establishments or tourist destinations, it is not reasonable to say that these are the only issues on customer choice because of the difficulty of taking location and price into account as assessment measures (Tourism 1996). Although Callan (1995, 1996) states that quality grading systems play a general role in the selection of hotels by UK customers, customers may not consider some specific attributes as important while choosing the hotel or the destination. For example, they may not want the hotel to have leisure facilities or activities for children or the beach to have showers. This means that grading or eco-label systems may sometimes fail to guess what a customer wants and needs, and to try to meet them.

Next, it is normally expected that any highly-graded hotel organisation should have a high quality of service and facilities. The hotel, even a lower grade hotel, should consider the importance of that issue in delivering better services to the customer. In a similar way, beaches with blue flags may be considered as better or cleaner than those without although this is not necessarily so. A lower grade does not necessarily mean that the hotel or the destination delivers lower level of service quality. Such a destination may have fewer facilities, but not necessarily poor quality services and facilities. However, in practice, this does sometimes happen. Finally,

there is a need for concern as to whether such best practices are suitable for the structure and culture of every destination.

5.6. Summary

This chapter has introduced quality grading and eco-label systems as a form of generic benchmarking studies and reviewed several benefits of this application to destinations, tourists as well as to individual organisations. The benefits of using quality grading systems and eco-labels as benchmarks for tourist destinations could be an improved image, improved tourist satisfaction, decreased operational costs, use for promotion and advertising, taking further advice from outside and, as a result, enhanced competitive advantage. If these systems are sufficiently understood, they could help tourists structure their expectations in line with the facilities and services likely to be offered. Individual organisations need to aim for such systems which will support their desired market position and which can be used to help them promote it. Consequently, any actions to encourage appropriate benchmarking participation by tourism organisations and destination management is likely to have a positive effect on the performance of the overall destination and its competitiveness. Although this chapter has looked into the possible scope of generic destination benchmarking, this study is not designed to test it empirically. The next chapter, based on methodological procedures, will therefore examine the practical applications of quantitative and qualitative performance measures at destinations and taking action from a wider perspective of internal and external benchmarking approaches.

Chapter Six

Research Methodology

6.0. Introduction

This chapter provides a discussion of the methodology, research design and procedures used to carry out destination benchmarking research in which a benchmarking model applicable to tourist destinations is developed and some of the benchmarking methods and measures are selectively tested. Defining the research problems and objectives is the first element in a conceptual model building framework (Hair *et al.* 1995). Therefore, the chapter begins with a brief overall review of previous benchmarking and destination competitiveness literature. Then, it establishes the model and the research hypotheses. It moves on to the development of destination benchmarking research methodology which is divided into four main sections. First, methods used and followed to carry out questionnaire surveys are explained. Second, the methodology used to collect secondary sources of data is given. Third, the place of site visits (observations) within destination benchmarking research is discussed. The chapter concludes by examining how all these findings can be interpreted as an overall contribution to the related literature.

6.1. Overview of Literature Review

Tourism has been defined as a multi-disciplinary field of study borrowing heavily from other related fields (Graburn and Jafari 1991). This research therefore aims to apply benchmarking, basically as a management concept, into the field of tourism research with particular attention to tourist destinations, as a self- and comparative performance measurement assessment and competitive advantage enhancement tool. The relevant literature on benchmarking, customer and tourist satisfac-

tion/dissatisfaction, tourist perceptions and their experiences, service quality, destination image, destination competitiveness and positioning has been explored; and textbooks, unpublished theses and reports and statistical bulletins consulted. Only a small number of benchmarking classifications have been produced. The majority of these classifications are basically related to reflecting the features of organisations, rather than tourist destinations and tourism and travel services (e.g. process benchmarking and performance benchmarking). Excluding some minor contributions which date back to the middle of the 1990s (e.g. Breiter and Kliner 1995; Marey and Dittmann 1995; Barksy 1996; Johns *et al.* 1996; DNH 1996; Min and Min 1997; Thomason *et al.* 1999a, 1999b), the application of benchmarking into the tourism and travel industry is scant. Specifically, an extensive literature review has failed to reveal any academic research conducted on developing a destination benchmarking methodology.

A number of research studies have examined the strengths and weaknesses of different tourist destinations on the basis of various quantitative and qualitative measures generated through primary and secondary sources of information (Goodrich 1977, 1978; Haahti and Yavas 1983; Haahti 1986; Yau and Chan 1990; Javalgi *et al.* 1992; Karlof and Ostblom 1993; Soanne 1993; Driscoll, Lawson and Niven 1994; Seaton 1996; Pearce 1997). However, no particular benchmarking methodology was employed and a more comprehensive investigation was not provided in these studies. Whilst useful, such studies did not deal with destination performance in the comprehensive and systematic way which would result from a benchmarking approach. As the contribution of benchmarking to comparative analysis is that 'lessons are learned' (Watson 1993), the enabling performance is observed and the enablers are then used as a model for changes in the host organisation (or destinations).

Referring to the limited research within the area, this study aims to develop a model for use in benchmarking destinations. The proposed model is built up in three stages: measuring performance, carrying out a certain type of benchmarking and taking action.

Although both methods are sometimes used in tandem, the literature review shows that benchmarking methodologies in the manufacturing industry are largely dominated by the assessment of quantitative measures such as profits, time scales, production and sale units (e.g. New and Szwejczweski 1995; Ehinlanwo and Zairi 1996) as opposed to the service industry which has been largely dominated by qualitative measures such as customer satisfaction with the delivery of services or image (e.g. Struebing 1996; Edgett and Snow 1996; Min and Min 1997; Zairi 1998). The reason could be the difficulty of quantifying components of services (Shetty 1993).

Bearing their importance in mind, this study aims to use both measures. Looking back at the list of measures given in Chapter 4, self-generated qualitative measures in this research include differences between pull and push motivations affecting the respondents' choice of the destination, between the level of their satisfaction (or dissatisfaction) with their holidays, between tourist comments and between tourist's intention of future behaviour. Self-generated and second-hand quantitative measures include the assessment of differences between how much money respondents spent and for what purpose during their holidays at sample destinations, between the number of repeat visits and between some other macro-based measures (metrics) such as the distribution of tourist arrivals and tourism incomes by years.

As emphasised in Chapter 2, there are limited applications in respect of statistical test assessment of results obtained from the comparison of measures such as tourist satisfaction or expenses. This is an essential research activity to draw reliable and valid conclusions from external benchmarking. Next, the benchmarking literature has focused on the development of external benchmarking procedures. Thus, in addition to external benchmarking, attention also needs to be paid to considering the importance and the relevance of internal benchmarking to destinations. Finally, cross-cultural differences either between destinations or between customer groups is also worthy of consideration in proposing a destination benchmarking model and taking action. The relevant hypotheses based upon the

proposed model will be developed in the next section for the empirical investigation of these issues.

6.2. Introduction to the Proposed Benchmarking Model

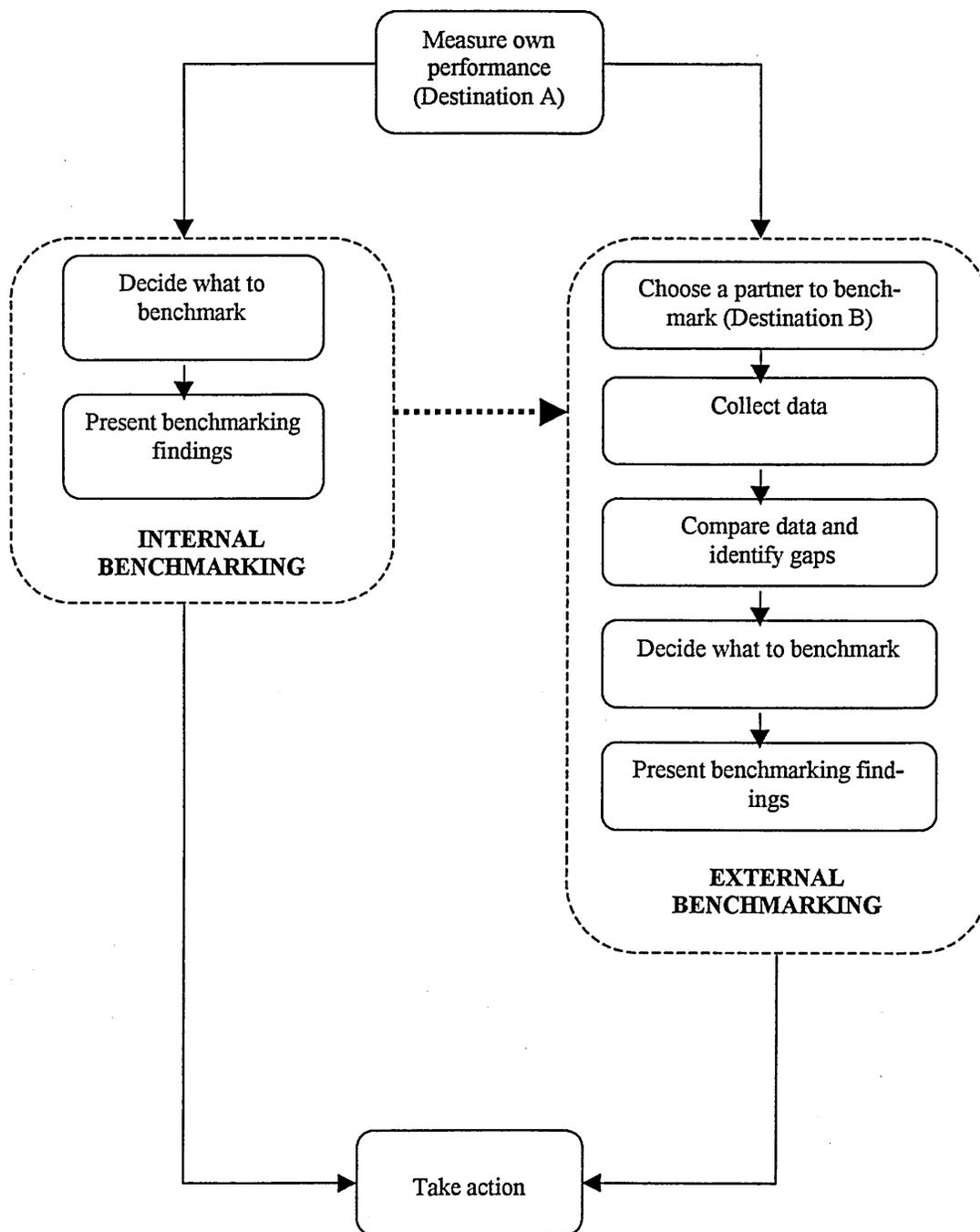
Tourism is a dynamic industry making a positive contribution to the development of towns and cities and other tourism destinations and the well-being of their local residents. Destination benchmarking may be vital in providing better quality facilities and services and increasing inputs through tourism activities on the supply side. The concept of destination benchmarking aims to provide international tourist destinations with an opportunity to increase their economic prosperity, protect environmental resources, preserve cultural values and increase the local residents' quality of life on the supply side. On the demand side, it aims to ensure that a high level of tourist satisfaction and loyalty to the destination is maintained by offering a high standard of facilities and services to meet customers' needs and expectations. This is also expected to lead to an increased intention of word-of-mouth recommendation through an improved image in the future.

To achieve its aims, a general approach to the proposed benchmarking model which is specifically applicable for international tourist destinations was initially provided in Chapter 3. Chapter 4 develops this by focusing on internal and external types of benchmarking. This chapter aims to deliver a more focused structure to the model by providing brief information about methods and tools for use in its operationalisation. The model is shown in Figure 6.1. Reflection on the literature review suggests that any kind of benchmarking begins by measuring one's own performance in order to specify areas which need to be benchmarked (Karlof and Ostblom 1993; Zairi 1992), with each destination needing to put into order their own priorities. It is proposed that both internal or external benchmarking helps to identify these priorities.

The model was developed using both quantitative and qualitative categories of performance measures. Qualitative measures include the assessment of tourist

motivations, satisfaction and comments. Quantitative measures comprise the assessment of tourist arrivals and their distribution by nationalities and months, average length of stay, annual tourist incomes, number of previous visits, and tourist expenditure and its distribution into sub-categories. The rationale of each measure used is discussed in Chapter 4.

Figure 6.1. The Proposed Model of Internal and External Benchmarking



6.2.1. An Approach to Internal Benchmarking

This approach requires the benchmarking of each destination on an individual basis. In this approach, various methods can be used to evaluate the potential changes in a destination's current performance. First, the highest and the lowest scores for each qualitative measure are identified. Attributes with the lowest scores need improvement. These scores are not compared to those in past years due to lack of data. Second, repeat tourists have been chosen as the sample in order to learn how the destination has changed compared with their previous visits and in what respects. Next, data on quantitative measures are assessed to examine changes over the years. Annual reports may help to understand how the destination performs compared to its previous performance. The findings should indicate where the destination has problems and whether this can be eliminated using internal resources rather than external ones.

6.2.2. An Approach to External Benchmarking

When external benchmarking is used, it is impossible to speculate on which attributes need to be taken into consideration for improvement until the comparison activity is completed and its results are fully presented. The reason is that the host and partner might both be performing well on attribute X. A negative gap on the part of the host will help to identify what to investigate further. In line with this, a model of external destination benchmarking with its main stages is suggested. It includes choosing a partner destination, collecting data, examining gaps and taking action (see Figure 6.1).

1. Choose a Partner Destination

In the research, two destinations, namely Turkey and Spain (Mallorca) are selected to benchmark their performance levels on the basis of pre-identified quantitative and qualitative measures. Turkey (benchmarker) is benchmarked against Mallorca (benchmarkee). Turkey is selected to be benchmarked against Mallorca

because Turkey is a less mature destination. Tourism marketing began to be developed there during the mid-1980s and it has great potential for competing in the international tourism industry. It is assumed that tourism will be the most important industry in the country's economic structure and prosperity and will occupy a leading place amongst the tourist receiving countries in the 2000s. However, it has serious problems, e.g. a low level of tourism income compared to the number of visitors attracted each year and low levels of service quality due to a lack of knowledge and of the motivation to follow current international improvements.

Spain was selected as the partner because it is an established and mature international destination. It overtook the US in 1995 as the second most important destination after France, in terms of international tourist arrivals. It showed an increase in tourist arrivals of 4.4% in 1995 compared to 1994 (WTO 1996). Second, it is a competitor of Turkey; the criterion for this is that destinations should offer similar products and are perceived as major competitors and substitute destinations for summer vacation tourism (Papatheodorou 1999).

As a specific destination, Mallorca could be nominated as a competitor against some resorts in Turkey or vice versa. Both destinations have similar tourism products and attract tourism demand from similar markets. However, as with other destinations such as Turkey, seasonality is a major concern. Records indicate that nearly 81% of international tourist arrivals in Mallorca are concentrated in the six months between May and November. The off-season (between December and April) attracts 19.5% of annual foreign arrivals (Ibatur 1996).

A well-known and more popular destination can attract more tourists than others (Heath and Wall 1996). According to official records, Mallorca has been a popular and well-established tourism destination, experiencing remarkable growth since the early 1960s and continues to preserve its competitive position by establishing product differentiation. Mallorca is a suitable partner as it attracts a high level of repeat tourists. Previous research revealed that 57% of German tourists

had made two or more visits. Of British tourists surveyed, 71% were making repeat visits (Juaneda 1996).

As a contribution to the assessment of the quantitative measures of destination benchmarking identified in Chapter 4, a more detailed examination of similarities and differences between the two destinations is presented in detail in Chapter 9 for the purpose of exemplifying the proposed benchmarking methodology. Further background information about the development of tourism in Mallorca and Turkey is provided in Appendix A.

2. Collect Data

As this research has been designed as a case study of two international destinations, multiple sources of evidence are used. In developing a case study, Yin (1994) suggests six sources of evidence for data collection. These are documents, archival records, interviews, direct observation, participant observation and physical artefacts. The first five of these are used in this research as they are relevant to building a case study of destination benchmarking. Documents include the review of articles, books, brochures and newspaper cuttings. Archival records contain the analysis of the historical data on the number of tourist arrivals, tourism income, accommodation capacity, occupancy rates and so on. Interviews refer to the design of the structured and open-ended surveys and brief interviews. Direct observation is used as a way of observing the facilities, services and products offered and backed up by photographs taken in both destinations. Finally, participant observation is the activity of visiting the partner destination as a customer and taking package holidays on several occasions. Further information about each method is provided in the following sections of this chapter.

3. Gap Analysis

This stage comprises identifying gaps and determining strengths and weaknesses of destinations. The results of the analysis stage are important for discovering

similarities and differences between destinations under investigation and making decisions as to whether there is any necessity for moving on to further stages of benchmarking. Therefore, the formulation of a basic external destination benchmarking model requires answers to the following questions:

1. What are the socio-economic and socio-demographic profiles of customers visiting similar destinations?
2. Which push and pull motivations are important to sample populations visiting each destination?
3. How likely are sample populations visiting both destinations to be satisfied with the same attributes?
4. How do customers see the perceived performance of an attribute at one destination in comparison with its performance at other destinations they have visited before?
5. How much do they contribute to the local economy in total and in what categories?
6. Do all these elements differ from one customer group to another visiting a different destination or between those visiting the same destination?

Benchmarking measures identified earlier and also shown above will be used. In the external benchmarking process, the current competitive gap is a measure of the difference between the destination's internal performance and that of the partner. A negative gap means that external operations are the benchmark and their best practices are clearly superior. A positive gap is indicative of internal operations showing a clear superiority over external operations (Camp 1989).

4. Decide What to Benchmark

The gap analysis model will be used to identify which attributes need to be put on the list for external benchmarking. Those with negative gaps will be accepted as the areas which need attention. This stage also considers whether there are any

factors influencing the possible application of one practice to another due to the possible differences between two destinations.

5. Present the Benchmarking Findings

This stage summarises the exercise of external benchmarking. It presents all the findings and their potential use. This stage aims to seek answers to such questions as: how to collect data from other destinations, whether there are any performance gaps, where and why, what are the other similarities and differences, whether the results are applicable, and whether there is any need to apply the results in practice? Depending upon these findings, further recommendations on what needs to be done and how to do it can be given before taking action.

6.3. Development of Hypotheses

As noted in the introductory chapter, the prime aims and objectives of this research are to investigate and demonstrate how benchmarking could be used to identify required performance improvements of tourist destinations and develop an initial benchmarking methodology. Based upon the stated research aims and objectives and the overview of previous research, the following four research hypotheses have been developed.

H₁ : Benchmarking can be applied to tourist destinations to identify their performance gaps and take action for improvement. This requires the establishment of destination-specific performance measures.

As emphasised earlier, insufficient attention has been paid to the development of a particular destination benchmarking methodology. This hypothesis was therefore developed in response to the basic idea of the benchmarking approach. Adapting the benchmarking approach into the tourism and hospitality fields, it is assumed that destinations' strengths and weaknesses could be compared with each other and destinations could have an opportunity to learn something from others' best

practices, mistakes and failures. Briefly, destinations should be aware of what they and their competitors provide and how they perform, due to the possibility of tour operators and customers exploring new destinations. By analysing the customer feedback and the factors influencing the performance of a destination, it is possible to identify what attributes need to be benchmarked (Karlof and Ostblom 1993; Zairi 1996). Findings may be useful to establish an accurate positioning strategy which will make the destination unique in some particular ways by improving some aspects of its characteristics and introducing new ones (Choy 1992).

Destination competitiveness is not an individual concept. Rather it is totally dependent on social, economic and political developments in the tourist generating countries as well as in the tourist receiving countries. Moreover, to be competitive, as Ritchie and Crouch (1993) point out, a destination periodically has to evaluate its resources such as hotels, events, attractions, transportation networks and its labour force and add economic values to them. One definition of benchmarking is that it is a way of collecting information about customers and other organisations within the same industry (Lu, Madu, Kauei and Winokur 1994). To facilitate destination benchmarking, destination authorities have to search for information about what tourists like or dislike, what their socio-economic and demographic profiles and motivations are and what other destinations are seeking to achieve and how to achieve the same results. This requires the establishment of destination-specific performance measures.

Depending upon the examination of their applications in the benchmarking literature, both qualitative and quantitative measures could be used for the purpose of undertaking research to identify internal and external performance of destinations (Karlof and Ostblom 1993; Bogan and English 1994; Morey and Dittmann 1995; Bell and Morey 1994; Zairi 1996; European Commission 1998). As a part of external benchmarking, tourist destinations could be benchmarked against each other by considering relevant destination attributes, as each destination has its own strengths and weaknesses which may generate satisfaction and dissatisfaction and raise or lower tourism income. As a result, each destination has something to

learn from the other as benchmarking is a two-way process. As a part of internal benchmarking, destinations could measure their performance levels either by using advanced statistical tools or by comparing current measures with earlier ones.

H₂: Where tourists have visited multiple destinations comparative surveys can be used to explore performance gaps.

Both primary and secondary types of data collection methods have been employed in the literature to carry out destination comparison/competitiveness research. Secondary data collection methods have primarily focused upon the analysis of pre-collected figures (e.g. Edwards 1993; Dieke 1993; Briguglio and Vella 1995; Bray 1996; Seaton 1996; Pearce 1997). Primary research methods focus solely on the collection of qualitative measures and the investigation of customer attitudes towards or satisfaction perceptions of the attractiveness of several individual destinations (e.g. Goodrich 1977, 1978; Hahti 1986; Calantone, Benedetto, Hakem and Bojanic 1989; Driscoll *et al.* 1994; Grabler 1997; Faulkner, Oppermann and Fredline 1999; Bothe, Crompton and Kim 1999). There is an upward trend in the number of studies using primary research methodology over recent years. Some researchers have attempted to use both quantitative and qualitative measures in a self-selected destination comparison survey such as the distribution of visits by seasons and tourists' likes or dislikes (Kozak and Rimmington 1999).

As is widely known, as a part of the service industry, tourism differs from other industries in that it requires customers (or users) to participate directly both in the production and consumption stages of products and services (Gronross 1978; Morrison 1989; Rust *et al.* 1996). This highlights the importance of measuring the satisfaction levels of those who actually experience the performance of the organisation. In other words, it is unreasonable in the tourism industry to avoid the experiences or the feedback of actual customers by asking outsiders about their ideas or feelings instead.

As each destination may have its own admirers, tourists satisfied in one destination would be different from others at a different destination. This creates a prob-

lem in the measurement of external performance as well as carrying out external benchmarking research while there is no problem for internal benchmarking. Nevertheless, previous studies relating to customer satisfaction and destination comparison/competitiveness research solely employed individual questionnaires. With limited exceptions (e.g. King 1994; Kozak and Rimmington 1999), much of the research conducted using primary methods was undertaken without evidence that respondents had actually been to all sample destinations, and research to date does not therefore provide a full account of destination competitiveness. The proposed customer satisfaction models may not help evaluate an destination's comparative service performance although they may help identify the key determinants of self-assessment service performance. In today's competitive environments, it may not be reasonable to underestimate improvements in competitors and customers' opinions about them.

In this research, it is expected that sample populations have direct experience in order to respond accurately to all the questions regarding their actual holiday experiences in each destination. Otherwise, findings do not accurately reflect the performance of destinations on specific attributes. The sample population therefore represents those who had been on holiday in the resorts of Mallorca and Turkey as a part of two-way competitive benchmarking; and in some other self-selected international destinations as a part of external benchmarking research.

H₃ : There are cross-cultural differences between tourists from different countries visiting the same destination. This issue needs to be considered while forming a destination benchmarking study.

A cross-cultural analysis requires a systematic comparison of similarities and differences in values, ideas, attitudes, symbols and so on (Engel and Blackwell 1982). Thus, the possible differences could occur in qualitative measures (e.g. level of tourist satisfaction or tourist motivation) or quantitative measures (e.g. tourist expenditure or length of stay). The proposition in the hypothesis is consistent with the findings of previous research in the tourism and hospitality fields and a reflection of the lack of sufficient research in general benchmarking considering

cross-cultural differences amongst a particular organisation's customers and between those visiting other competitor organisations. Karlof and Ostblom (1993), in a benchmarking research project, draw attention to the attempts to distinguish different markets if the organisation (or destination) serves more than one market. A number of empirical studies have sought to explore the similarities and differences between multiple groups in relation to several vacation travel patterns and attitudes towards the selected destinations (Richardson and Crompton 1988; Pizam and Sussmann 1995; Sussmann and Rashcovsky (1997).

The findings of the past research confirmed that tourist perceptions of a destination or hospitality businesses or their satisfaction levels, demographic profiles and the activities in which they participated during their stay may vary according to countries of origin (Richardson and Crompton 1988; Calantone *et al.* 1989; Luk *et al.* 1993; Chadee and Mattsson 1996; Danaher and Arweiler 1996; Huang *et al.* 1996; Armstrong *et al.* 1997; Lee and Ulgado 1997; Kozak and Nield 1998). Despite this, as pointed out earlier in Chapter 2, past destination research in tourist satisfaction, motivation and tourist expenditure is limited to homogeneous sample populations and sample destinations (e.g. Fujii *et al.* 1985; Hill *et al.* 1990; Pizam and Milman 1993; Qu and Li 1997; Weber 1997; Legoherele 1998; Cai 1998; Mules 1998; Ryan and Glendon 1998). Sampling respondents represent only one country and those tourists visiting only one destination. This issue also applies to the context of the existing benchmarking literature.

A destination attracts customers from different cultures and countries, so tourists might be more or less satisfied or might have different motivations or different expenditure patterns depending on the countries from which they originate. The analysis of customer surveys sought to investigate whether any cross-cultural differences in tourists' perceived satisfaction levels with their holiday experiences at the same destination, their motivations and expenditure levels is important to the decision-making process of destination managers regarding the implementation of destination management and marketing strategies which are appropriate for each market, e.g. positioning and market segmentation. Those who come from other

main generating countries therefore need to be included in benchmarking research. However, it is not clear what action to take when one group perceives a set of attributes to be better or has stronger motivations than another. Whose feedback will determine destination benchmarking? The former's or the latter's or a combination of both? Destination benchmarking needs to address this question.

H₄: The comparison of international tourist destinations is impeded by their cultural, economic and geographical differences. These need to be considered while proposing a destination benchmarking study.

Some researchers in the field of benchmarking take a conceptual approach describing why benchmarking is important for organisations and for outlining the process of benchmarking (Camp 1989; Balm 1992; Watson 1993; Karlof and Ostblom 1993; Kleiner 1994; Zairi 1992, 1994, 1998; Zairi and Hutton 1995; Balm 1996; Elmuti and Kathawala 1997). Others take an applied approach to identify gaps between organisations by using qualitative and quantitative measures and recommend ways of closing these gaps without much consideration into the impact of other factors which could probably affect the successful implementation of benchmarking findings (Bell and Morey 1995; Morey and Dittman 1995; Zhao *et al.* 1995; Edgett and Snow 1996; Goh and Richards 1997; Min and Min 1997; Zairi 1998; Thomason *et al.* 1999a, 1999b).

As discussed earlier in Chapters 2 and 3, the widespread criticism of benchmarking stems from the notion that each organisation or destination may have its own language system which is used to set up objectives and policies, e.g. laws, regulations, economic structure, planning and management culture (Goldwasser 1995; Codling 1997; Cox and Thompson 1998; Bhutto and Huq 1999; Campbell 1999). Like every organisation has a unique business culture and strategy, tourist destinations may also do so. The major issue covers cultural differences in management and marketing practices of two different international, or even national, tourist destinations. Within the destination management context, Kotler *et al.* (1993:20) emphasise that

no two places are likely to sort out their strategies, use their resources, define their products, or implement their plans in the same way. Places differ in their histories, cultures, politics, leadership and particular ways of managing public and private relationships.

In the same line of argument, Gunn (1997: 99) notes that 'every political and geographical area has a different historical background, different traditions, different ways of living and different means of accomplishing objectives'. In other words, each destination may have different community values and individual characteristics and may have unique ambitions for its future. Thus, models and techniques applied in one destination may not be applicable to another or may not give similar results even when applied.

The identification of such factors is a critical step in the analysis of best practices emerging from benchmarking studies. Beretta, Dossi and Grove (1998) point out that environmental factors and organisation structure are effective over the success of benchmarking studies. Transferring these factors to tourist destinations, environmental factors are designed by economic, political and social factors such as tax regulations, exchange rates, finance and banking management and culture as well as geographical factors such as the size of land or the distribution of tourism activities in the country by regions. Organisation structure refers to the feature of centralisation or decentralisation of the government, diffusion of authority and responsibility, and human resources. All these factors will be investigated within this hypothesis.

6.4. Formulation of Research Methods

There is an ongoing argument with respect to choosing either quantitative or qualitative research methods for benchmarking although a great deal of research has been conducted using both methods (McNair and Leibfried 1992; Watson 1993; Karlof and Ostblom 1993). Moreover, based on the assessment of past empirical benchmarking studies, Dorsch and Yasin (1998) made the criticism that most of the benchmarking publications have been produced by researchers from

the industry and several differences have been observed in respect of the methodology chosen. While academic researchers used both quantitative and qualitative methods, researchers from the industry avoided quantitative approaches.

Despite this ongoing debate in benchmarking, the application of destination benchmarking research suggests the assessment of primary and secondary sources of data gathered using both quantitative and qualitative research methods. Qualitative research methods present the collection and the analysis of verbal data such as open-ended questionnaires, observations, case studies, interviews and documents whereas quantitative research methods refer to the collection and the analysis of either primary or secondary numerical or statistical (non-verbal) data. Both research methods can be used as a complementary ingredient of empirical surveys (Bryman 1988). The review of literature indicated that telephone surveys, mail surveys and personal interviews (including questionnaire surveys in the presence of the researcher) are the predominant methodologies used by organisations to obtain customer feedback (Mentzer *et al.* 1995). The application of benchmarking into the fields of tourism and hospitality has been limited to the use of customer surveys (CBI News 1995; DNH 1996; Cheshire 1997), with the exception of secondary sources of data and observations. Destination benchmarking needs to fill this gap.

Therefore, this research is primarily based on the findings of a questionnaire survey along with observations and secondary sources of data. Questionnaire design and data collection procedures were adapted from the literature (Churchill 1979; Hinkin, Tracey and Enz 1997). The suggested essential activities for generating a potentially effective questionnaire and identifying elements of good practice in quantitative and qualitative research are listed in Table 6.1 (see also Figure 6.2).

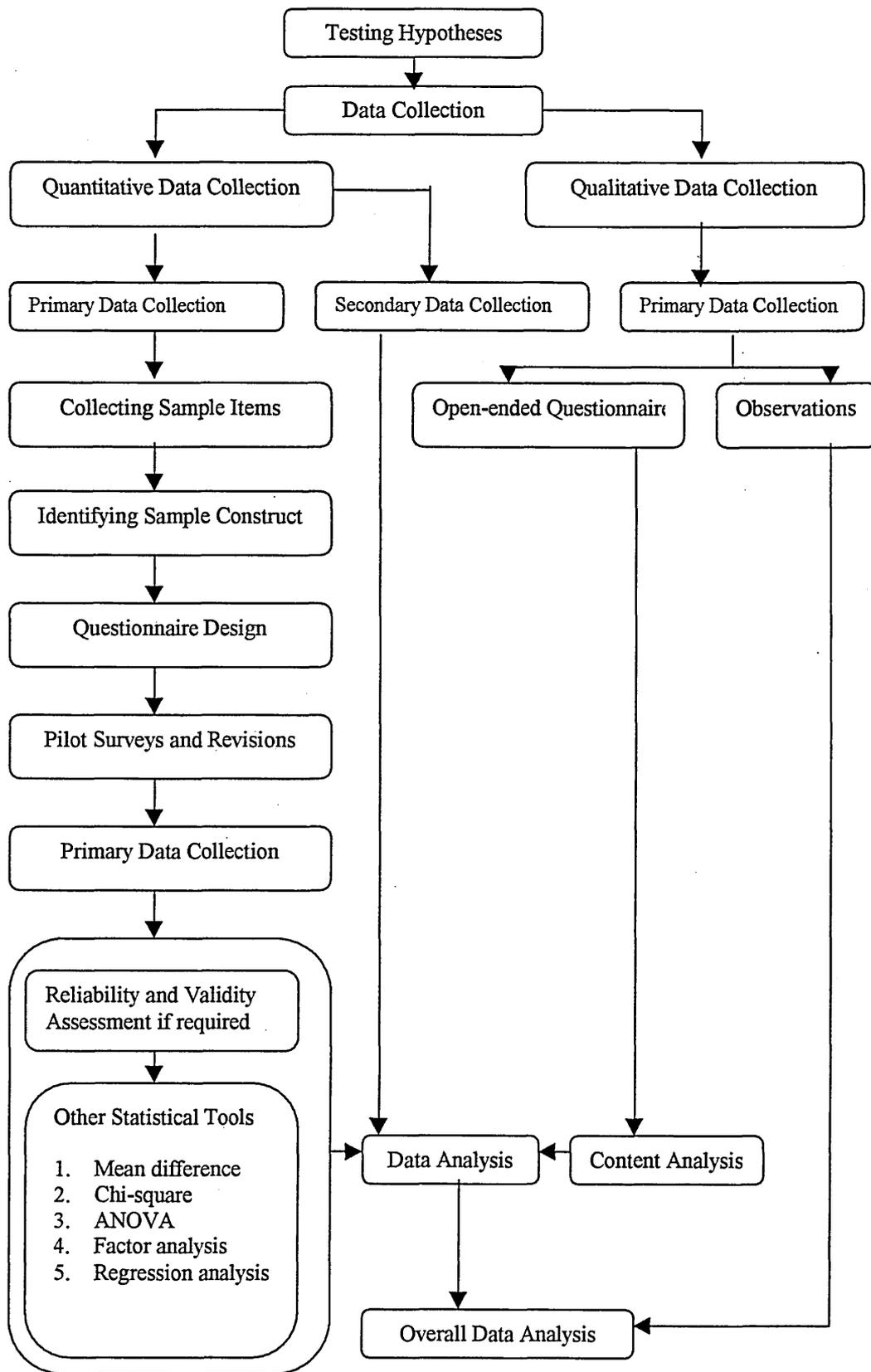
Although all these procedures are either extensively or briefly explained in some respects in this chapter, they were divided into several categories. The first four sub-procedures of primary data collection are extensively analysed in this chapter. The next three sub-procedures will be identified in the following chapter (Chapter

7). The analysis of data obtained from open-ended questionnaires and observations is presented in Chapter 8. The findings of secondary sources of data will be presented in Chapter 9. An overall analysis of all these procedures including making observations or inspections will take place in Chapter 10.

Table 6.1 Elements of Good Practice in Quantitative and Qualitative Research

Research Activities	Details
1. Quantitative Research Methods	Refer to the collection and the analysis of either primary or secondary numerical or statistical (non-verbal) data.
1.1. Primary Data Collection	Used to obtain first-hand information from the sample population or about the object or subject under investigation.
Generating items	Primary stage in a questionnaire design. An essential stage to identify attributes that will be used in a benchmarking study. Items can be generated through both primary and secondary sources.
Identifying the construct	The construct is the structured form of questions and consists of various types of scales such as likert and semantic differential. Easier to manage and assess the findings.
Pilot survey and revision of the instruments	Carried out to ensure that respondents are able to understand the wording and content of the questionnaire and willing to provide the information requested. Also useful to develop the final draft of questionnaires.
Data collection (main survey)	This stage encompasses the choice of sample destinations and sample populations, the calculation of the sample size and the delivery of questionnaires.
Reliability assessment	Performed to test the reliability and internal consistency of items in a structured questionnaire. The higher value indicates that the better the instrument is.
Validity assessment	Performed to examine whether the scale measures what it purports to measure. The higher value between the scale and the related item indicates that the instrument is valid. In other words, it is capable of measuring what it has been designed for.
Employing statistical tests	Chi-square, analysis of variance and t-test are used to test whether any difference exists between sample groups. Factor analysis is performed to demonstrate the extent to which questions seem to be measuring the same variables and the degree to which they could be reduced to a more general and smaller set of factor attributes. Regression analysis is performed to determine the aggregate impact of certain independent variables on dependent variables (e.g. performance measures and total tourist expenditure). All these tests could be helpful in destination benchmarking.
1.2. Secondary data collection	A type of data collection entirely from secondary sources such as reports, books, articles, newspapers and so on.
2. Qualitative Research Methods	Present the collection and the analysis of verbal data such as open-ended questionnaires, observations, case studies, interviews and documents.
2.1. Open-ended questionnaires	Helps the researcher obtain detailed information in tourists' own words about their positive or negative holiday experiences in the destination. Also a useful method to obtain comments from tourists for improvement. Content analysis is a method for use in analysing open-ended questionnaire data as well as documents.
2.2. Observations (Inspections)	A research technique to observe objects and subjects in their natural surroundings (different aspects of destinations) and find out if there are any differences between them. The researcher has the ability to obtain first-hand knowledge by watching, rather than receiving reports prepared by others.
3. Analysis of Data	The next stage where data are assessed to test hypotheses and draw a conclusion. Data are usually processed and analysed using either computer-based statistical tests or content analysis.
4. Overall Analysis	Findings could illustrate the areas where gaps appear and identify the root causes of problems in one destination and examples of good practice in another.

Figure 6.2. Data Collection Methods in Destination Benchmarking Research



Source: Own elaboration. Derived from numerous literature references as discussed in this chapter.

A great number of scales have been recorded in the customer satisfaction literature despite the fact that all attempts have the same purpose which is to measure customer satisfaction (Yi 1990). Two broad types of scales are identified in consumer behaviour research: single and multi-item scales. It is widely believed that multi-item scales are more reliable and have higher content validity as they can provide information on components, assess various dimensions separately and reliability may be assessed (Churchill 1979; Danaher and Haddrell 1996). Previous customer satisfaction studies have tended to use multi-item scales (e.g. Krishnan and Granhaug 1979). As a result, the multi-item scales used in this research are a version of likert-type (questionnaire 1), semantic differential (questionnaire 2) and verbal (questionnaire 3), which are all presented in Table 6.2.

Table 6.2. Types of Questionnaires Used in the Destination Benchmarking Research

Survey	Type of Data	Structure of Questions	Sample Population	Purpose
Questionnaire 1	Quantitative	7-point satisfaction scale & 7-point motivation scale	Those visiting the sample destination on the last occasion	To investigate the performance of the destination on the basis of tourist motivation, satisfaction, comments and expenditure. Designed to measure both internal and external performance.
Questionnaire 2	Quantitative	5-point much better-much worse scale	Those visiting both sample destinations in the last four years	To investigate the extent to which the findings of the first survey on the level of satisfaction could be empirically supported. Designed to measure external performance.
Questionnaire 3	Qualitative	Open-ended (verbal) questions	Those visiting multiple destinations in the last four years Those who have been to the sample destination at least once before.	To investigate the competitive position of Turkey and Mallorca not only against each other but also against other major destinations on the basis of several attributes. Designed to measure external performance. To investigate repeat tourists' perceptions of positive and negative changes in destinations compared to their last visits in the preceding years. Designed to measure internal performance.

All the three questionnaires were designed alongside the guidelines of the performance-only approach since it avoids the use of expectations within the measurement of customer satisfaction due to the limitations of the disconfirmation approach (Oliver 1980; Churchill and Suprenant 1982; Cronin and Taylor 1992; Ervelles and Leavitt 1992). It is proposed that regardless of the existence of any previous expectations, the customer is likely to be satisfied when a product or

service performs at a desired level (Czepiel *et al.* 1974). There is empirical support for the idea that the performance-only approach had higher reliability and validity values than did other approaches. The performance-only approach also had the best correlation with the evaluation of both future behaviour and overall satisfaction (Prakash 1984; Crompton and Lover 1995; Yuksel and Rimmington 1998). This approach has also been employed in the measurement of tourist satisfaction with destinations (Pizam, Neumann and Reichel 1978; Danaher and Arweiler 1996; Qu and Li 1997).

6.4.1. Application of Quantitative Research Methods

This stage includes an in-depth analysis of methods used to collect both primary and secondary sources of data as a contribution to the relationship between the application of quantitative research methods and carrying out a destination benchmarking investigation.

6.4.1.1. Collecting Primary Data

The type of questions to be asked in a survey are related to the type of research problems and objectives. In identifying target markets, two conceptual approaches are presented (Kotler *et al.* 1993). One is to collect data about the current tourists' country of origin, their demographic profiles, their reasons for coming, their satisfaction levels, the level of their repeat visits and their total spending while on vacation. Such information may be helpful in analysing the market to determine which group is easiest to attract and so as to bring more benefits. The other approach is to reach those potential markets which are interested in the destination. However, this type of research has some limitations such as accessibility, time and cost. Based on Kotler and his colleagues' approach together with other contributions reviewed in earlier chapters, the purpose of conducting primary research was to obtain first-hand information from actual tourists concerning:

- ◆ their socio-demographic and socio-economic background and holiday-taking patterns
- ◆ their motivations
- ◆ their level of satisfaction with holiday experiences at their destination
- ◆ their comments and complaints about tourist services at their destination
- ◆ their level of expenditure while on holiday
- ◆ their likelihood of returning and word-of-mouth recommendation.

Quantitative data were gathered by delivering two different types of survey instruments designed in the format of a structured questionnaire. Further stages in respect to the designation and delivery of these instruments are explained in more detail in the following sections. A questionnaire survey, either open-ended or structured, provides advantages such as (Pizam 1994b):

- ◆ flexibility in choosing the desired data collection method (postal survey, personal interviews and so on),
- ◆ results can be generalised either to the whole population or to other similar populations,
- ◆ a cost-effective type of research design,
- ◆ giving opportunity to collect a large amount of information, which improves the accuracy of results.

Questionnaire surveys are also regarded as essential benchmarking tools when properly employed during the research. They can provide quantitative data and are inexpensive to administer (Bogan and English 1994). The flow of the primary and secondary sources of data collection stages on which this research is based is displayed in Figure 6.2.

A number of relevant attributes or items need to be identified to be able to examine the performance of one destination from the customers' point of view and consider them while benchmarking. Item generation is a process which requires three steps (McDougall and Munro 1994). The review of relevant literature could be a

starting point. Next, open-ended interviews with experienced individuals and questionnaires could lead to further items. The last step could be to ask a team of specialists to review the proposed instrument and its clarity.

Analysis of literature displayed substantial variations in the number and nature of attributes considered relevant to tourist motivation and satisfaction with destinations (e.g. Goodrich 1977; Pizam *et al.* 1978; Dorfman 1979; Pearce 1982). It is also debatable whether attributes relevant to different customer groups and different international destinations are transferable between different contexts. It is known that the list of items in a tourist motivation or satisfaction survey has been generated by the researcher rather than respondents (Dann 1996). A pool of destination attributes was therefore generated through both primary and secondary sources (Robson 1993). This process is briefly explained in the following paragraphs.

6.4.1.1.1. Generating Items

Primary sources used to enhance list generation included open-ended questionnaires distributed to the university staff, personal experience and informal discussions with several researchers. Open-ended questions are recommended for designing actual questionnaire surveys to determine the main categories (Moser and Kalton 1971). The list of both push motivation items and destination satisfaction attributes was generated by sending an open-ended questionnaire (via a university-based internal mail system) to a group of staff working at Sheffield Hallam University who had visited any Mediterranean destinations during the summer vacation for one of their recent holidays (n=30). The sample population was randomly selected from academics and staff using the university directory list. Respondents were asked to list the three most and the least important personal reasons which made them choose to visit places and identify what they most liked and disliked about their vacations. It was not necessary to produce a list of pull motivations in advance of the main questionnaire survey since they were designed as open-ended questions.

A supplementary questionnaire which aimed to collect further details regarding destination attributes, likely to be important to travel agents and their customers, was administered amongst a small sample of travel agents in Sheffield (n=10). The sample included those which were randomly selected from the directory list of travel agents in the UK provided by the Association of British Travel Agents' Association (ABTA). A copy of the questionnaire was sent by post, along with a pre-paid envelope.

The manager of a travel agent based in Sheffield gave an in-depth interview in order to find out what attributes tourists like and dislike. A further objective of the interview was to learn whether Mallorca or Turkey was mostly preferred by British tourists and in what respects each was perceived to be important. The managers of other five travel agents refused to take part due to time constraints.

As the researcher was familiar with the tourism industry in Turkey, two site visits, one package holiday and one individual, were arranged to Mallorca to become more familiar with tourism in the area. These visits were made in October and December 1997. These three stages gave the author an opportunity not only to observe their characteristics but also investigate similarities and differences between these two destinations. Additional items were added to the scale based upon informal discussions with people specialising in the field of tourism and familiar with Mallorca and Turkey. They were the members of several universities located in the UK, Spain, the US and Turkey.

Several secondary sources were used to enhance the list of items. First, brochures about Mallorca and Turkey were read for likely attributes. Next, some televised holiday programs such as 'Wish You Were Here' (ITV) and 'Holiday' (BBC 1) were helpful in understanding the main features of destinations both in Turkey and Mallorca and how they were being presented to the market. The researcher watched and made notes about them in order to contribute to the list of attributes. In addition, further attributes were drawn from literature primarily focused on destination attractiveness, image, choice and satisfaction (e.g. Danaher and Ar-

weiler 1996; Dorfman 1979; Goodrich 1977, 1978; Loundsbury and Hoopes 1985; Pizam *et al.* 1978; Whipple and Thach 1988).

6.4.1.1.2. Identifying Construct

Literature suggests that both likert type and semantic differential scales can be used to evaluate tourist experiences at the destination, since they are effective in measuring customer attitudes, easy to construct and manage, require little time to administer and avoid the risk of verbal bias (Moser and Kalton 1971; McDougall and Munro 1994). Results can be analysed by using statistical techniques (Osgood, Suci and Tannenbaum 1971). Empirical research findings demonstrate that the likert and semantic differential scales are more reliable and valid (Fishbein and Ajzen 1975; Westbrook and Oliver 1991) and are suitable for a large amount of data set (McDougall and Munro 1994). Likert type scales have been widely used in tourism and travel research in order to identify the tourists' perceptions of attributes, attitudes, satisfaction levels and motivations (Jaffe and Nebenzahl 1984; Um and Crompton 1990; Chon and Olsen 1991; McDougall and Munro 1994; Bramwell 1998; Sonmez and Graefe 1998). These scales may also be used in the benchmarking measurement processes as they enable the researcher to identify and compare gaps and make action plans (Madigan 1993; Bogan and English 1994).

It has been shown that respondents prefer verbal labels to numerical labels when both are used on the same scale (Haley and Case 1979). Survey results indicate that respondents also tend to overuse the extremes of a numerical scale with verbal anchors at the ends, while an agreement scale without numbers was less subject to this extremity response bias (Shulman 1973). In this research, therefore, verbal rather than numerical response alternatives were provided for each question of motivation and tourist satisfaction. Detailed justification for scale development is explained for each type of questionnaire in the following sections.

6.4.1.1.2.1. Design of Questionnaire 1

This questionnaire is designed to collect data required to test all the hypotheses. The most common criterion in benchmarking is that it should start with understanding the performance of a specified organisation or destination (McNair and Leibfield 1992; Karlof and Ostblom 1993). The findings of this questionnaire are expected to be used for carrying out internal and external benchmarking procedures. An independent and simple questionnaire is needed to measure a destination's performance before comparisons can be made and also to prepare the ground for external benchmarking research. Concerning the application of the gap analysis model, the findings will be compared with those of another similar questionnaire distributed in the partner destination. This part of the research presents detailed information about the development of a questionnaire composed of three sections.

The first section involved basic demographic and background data on the respondents and their vacations either in Turkey or in Mallorca. This section comprised nine questions in total. Results are expected to be useful for understanding the profiles of tourists visiting both destinations and investigating the most effective factors influencing the level of tourist expenditure while on vacation.

As tourists do not always attach the same importance to product attributes, it is crucial to understand the factors that influence tourist behaviour and which particular elements are seen by them as important (Mayo and Jarvis 1981). The simplest way of achieving this task is to ask those taking holidays. This task is also a priority in the most common benchmarking (Zairi 1996). Tourism literature emphasises the importance of both pull and push factors in shaping tourist motivation and the choice of vacation destinations (Crompton 1979). Thus, the next two sections were devoted to the examination of tourist motivation. The second part of the questionnaire was based on self-reported motivation items and comprised open-ended questions in order to investigate the major factors that respondents considered important in selecting the destination under investigation in this study. These factors could also be regarded as pull motivators (destination-based) influ-

encing customer choice in selecting a particular destination in the summer season. This section is based on the number of times a reason was given as being one of the three most important reasons for visiting Turkey and Mallorca.

The third part involved major motivation elements pushing tourists to take a vacation to a particular sample destination. Respondents were asked to rate each of the items on a seven-point likert type scale based on the relative importance of each of fourteen tourist motivations pushing them into tourism activities in the summer season. This section of the questionnaire presented statements such as 'I came to Turkey/ Mallorca to get close to nature' or 'I came to Turkey/Mallorca to meet local people', and so on. If respondents thought that there was any question which was inapplicable, they were then advised to move on to the next. The 'important-not important' scale was also used by other researchers (Hill *et al.* 1990). The anchor points of the scale were represented in the following order: *not important at all* (1), *very unimportant* (2), *slightly unimportant* (3), *neither important nor unimportant* (4), *slightly important* (5), *very important* (6), and *extremely important* (7). The reason for using a Likert-type scale and employing a number of multiple push motivation variables was that motivation is multi-dimensional and tourists want to have more than one experience at a destination (Pyo *et al.* 1989).

In line with the overview of literature review given in Chapter 4, customer satisfaction could be considered as a driver (impacts on word-of-mouth recommendation and repeat visits) and also an output (based on outcomes of actual holiday experiences). Customer satisfaction or dissatisfaction with products and services is regarded as a measure of performance (Krishnan and Gronhaug 1979; Camp 1989; Zairi 1992; Bogan and English 1994). Destination attributes are critical because they influence the choice of destinations (Illum and Schaefer 1995). The literature review showed that destination attributes had been used in several studies with different research objectives, different samples, different methodologies and different findings. In this study they have been used for another purpose, spe-

cifically to benchmark strengths and weaknesses of two different international tourist destinations by considering actual tourist experiences.

Therefore, the next part, with 55 questions based on a seven-point scale ranging from 'delighted' to 'terrible', was structured to indicate the extent to which tourists were satisfied or dissatisfied with pre-identified destination attributes such as attractions, facilities and services in specific Mallorcan and Turkish resorts. The structure of the scale was based on the following categories: *terrible* (1), *unhappy* (2), *mostly dissatisfied* (3), *neither satisfied nor dissatisfied* (4), *mostly satisfied* (5), *pleased* (6) and *delighted* (7). The delighted-terrible scale is believed to be suitable for measurement of customer satisfaction as it reduces the skewedness of satisfaction responses (Westbrook 1980; Maddox 1985). The use of the delighted-terrible scale, developed by Andrews and Withey (1976), was modified and applied to measuring customer satisfaction by some researchers such as Westbrook (1979, 1980) and Bitner and Hubbert (1994). It has been used in studies of tourist satisfaction with destinations (Maddox 1985; Chon and Olsen 1990) and has also been applied to the importance and performance analysis of tourism, travel, leisure and recreation facilities (Guadagnola 1985; Burns 1988). However, its application in tourist satisfaction research is still limited.

The subsequent part of the questionnaire, with five questions, was designed to determine tourist satisfaction with the overall destination (seven-point scale ranging from 'delighted' to 'terrible'); how likely they were to revisit the same resort in the future (seven-point scale ranging from 'definitely' to 'not likely at all'), how likely they were to recommend the resort to others (seven-point scale ranging from 'definitely' to 'not likely at all'). Where summary questions are used, respondents are asked to give an overall evaluation of their satisfaction with the service (or the destination), and also asked to rate the key components of the service process (destination attributes) rather than employing only a single question. The level of overall satisfaction is believed to be a function of satisfaction with each service encounter (Bitner and Hubbert 1994). A global measure of overall tourist satisfaction is useful while testing the convergent validity of the

scale. It is therefore suggested that summary questions be added to the questionnaire involving the level of overall satisfaction, intention to repurchase (or revisit) and recommend their experiences to others (Rust *et al.* 1996). Similar types of questions have been employed in previous research (Getty and Thompson 1994). Such types of summary questions, as suggested in Chapter 4, may ease the interpretation of attributes on the basis of destination benchmarking and the internal performance analysis of destinations, rather than capturing gaps between the two on the basis of 'apple to apple' comparison.

The next question was included to see if tourists considered that there were any tourism products and services that need to be improved in Mallorca's or Turkey's resorts (tourist comments). Fourteen items were pre-identified. Some spaces were also provided so the respondents were able to present any other items which were absent from the list. Findings may be useful to explore what items need to be improved and to match the findings with those of the scales.

The last section involved open-ended questions to assess the respondents' total expenditure involved in holidaying either in Turkey or Mallorca. Specifically, they were asked to estimate the amount of money they spent for on various categories such as food and beverages, souvenirs and gifts, local transport, car rental, day trips and so on in their own currency. This did not cover package tour and accommodation costs. To find out how many people the total expenses covered, respondents were asked to give the number of people in their party. This section also gave the cost per person for package tours.

6.4.1.1.2.2. Design of Questionnaire 2

This questionnaire is designed to collect the data required to test hypotheses 2 and 4. As noted earlier, there has been insufficient attention in the literature relating to the consideration of those visiting the peer destination as the sample population and the investigation of their comparative satisfaction levels. It is believed that the comparison of a destination with others offering similar types of holidays enables

the destination not only to evaluate the nature of the competition but also to identify new market opportunities by reflecting how others are performing (Goodall 1990). Thus, this questionnaire aims to measure the performance of one destination over another on several attributes by employing a revised form of semantic differential scales and asking respondents who have recently been to both destinations to compare them directly on the same questionnaire. The sample population who participated in this survey could be accepted as a control group which is necessary to test the validity of the findings of questionnaire 1.

There are two different opinions about the measurement of customer satisfaction (Singh 1991). The first accepts the idea that customers must have their own experiences with the product or service in order to make a judgement about the level of satisfaction (direct measure of satisfaction). The second primarily focuses on the indirect measures of satisfaction by considering customers' general opinions about a particular product or service. Despite this classification, marketing literature has paid most attention to direct customer experiences while investigating the level of satisfaction. Klaus (1985: 21), for example, defines satisfaction as 'the consumer's subjective evaluation of a consumption experience based on some relationship between the consumer's perceptions and objective attributes of the product'. Previous benchmarking research demonstrated that organisations also ask their customers to compare their performance with their competitors while carrying out competitive benchmarking analysis (Mentzer *et al.* 1995).

For the reasons given above, this study not only uses a modified scale but also proposes a different scale developed for the purpose of gathering data by asking tourists who had already visited the partner destination in order to make a direct comparison with their perceptions of the host destination. When the survey was conducted in the host destination, respondents were requested not only to state their satisfaction perceptions of that destination but also to compare them with those of the partner destination if they have been there recently. This was intended to give tourists an opportunity to match the performance of both destinations with respect to facilities, activities, levels of tourist services and so on.

As demonstrated in the second hypothesis, few studies measuring customer perceptions of destinations have investigated perceptions of different destinations within the same questionnaire. One disadvantage of this is that attribute scales do not necessarily reflect perceived superiority or inferiority. This proposed method asks respondents to compare only two destinations directly. The intention is to generate reliable results for determining which one performs better from the customers' point of view. This technique stems from the assumption that people are more likely to compare something reliably by considering their own experiences. This is done on the basis of 'something here is better than another in X' or 'X is more expensive than Y'.

This research used bipolar adjectives on the same questionnaire to make comparisons. The format required tourists to make comparisons between their current holiday experiences in Turkey and their past experiences in any resort in Mallorca where they had recently (in the last four years) been on vacation or vice versa. Semantic differential scales were used since they have been found to have high reliability coefficients when applied to attitude measurement and fit well with the purpose of this study (Fishbein and Ahjen 1975; Danaher and Haddrell 1996). A five-point semantic scale was developed. To give an example, it ranges from an extreme of 'much more expensive' (1) to 'much cheaper' (5) for a statement aiming to measure the perceived level of food and beverage prices at the given destination compared to that of another. The same set of destination attributes in questionnaire 1 was asked in questionnaire 2, but in a revised label and scale. Unlike previous comparison research (Goodrich 1977, 1978; Hahti 1986; Driscoll *et al.* 1994) but consistent with questionnaire 1, this research used verbal rather than numerical labels as there were variations in the format of labels, e.g. much better-much worse in one question and much cheaper-much more expensive in another.

This method could be criticised on the basis that it cannot easily be extended to more than two destinations since this would make the evaluation process more complex and lengthy. It is however a useful tool for two-directional benchmarking studies. Similar types of scales have previously been applied within the marketing

literature to measure how a customer perceives any service or product compared with the expectation (disconfirmation method). Incorporating this view into this research, the respondent was asked to make a comparison of experiences in one destination compared with those in another.

Questions with respect to the overall level of satisfaction, intentions to return and recommend were also presented. Respondents utilised a five-point likert type scale to indicate the extent to which they were satisfied or dissatisfied overall with their holidays in Turkey. A five-point scale ranging between 'definitely' (5) and 'not likely at all' (1) was used for measuring the respondents' intentions to revisit and recommend their holidays in Turkey to third parties and to return in the future. Similar types of questions were asked to investigate overall satisfaction of customers and their likelihood to visit and recommend the partner destination (Mallorca) that had previously been visited.

6.4.1.1.3. Data Collection (Pilot Surveys) and Revision of Instruments

The main purpose of pilot surveys is to be sure that respondents are able to understand the wording and content of questions and willing to provide the information requested (Chisnall 1992). Depending on the observations during the pilot survey, the main statements or items to be used in the actual questionnaire survey can be reduced or increased. Among other major benefits of the pilot survey are gaining familiarity with respondents and their views, which may lead to some modification of questionnaire content, trying out field-work management arrangements and gaining a preliminary estimate of the likely response rate (Veal 1998). Furthermore, conducting a pilot survey helps to test the reliability and validity of the scale (Moser and Kalton 1971) and perform an item analysis to eliminate items with the weakest item-to-total correlation values from the further stage of the survey (McDougall and Munro 1994).

The first draft of questionnaires 1 and 2 were piloted amongst 220 British tourists travelling to Mallorca at the beginning of 1998. This was done in order to test the

applicability and reliability of questions and revise the questionnaire format. In total, 42 attributes, potentially relevant for both destination management and tourists, were used in the pilot questionnaire. The reliability analysis of the findings of questionnaire 1 demonstrated that the scale was highly reliable ($\alpha=.98$) and the item-to-total correlation which indicates the degree of an item's relationship to the total score had very high scores for almost all items ranging between .69 and .81. The scale designed for questionnaire 2 was found to be internally reliable ($\alpha=.96$). The item-to-total correlation had high scores ranging between .46 and .73.

It should be noted that such alternative procedures were applied during the pilot survey because the collaboration efforts with the Turkish Tourism Office, London, and with local travel agents failed to obtain the names and addresses of those who had been to Turkey and Mallorca previously. It is not easy to measure how much this issue has affected the findings of the pilot survey. However, it is worth pointing out that the administration of the pilot survey amongst those who were at the destination could provide more reliable data than alternative methods as the researcher was able to obtain tourists' perceptions of their vacations while still fresh in their minds.

In the light of practical observations and empirical findings from the pilot studies, the main questionnaires were developed and the number of attributes was raised to 55. The final drafts of the questionnaires were screened by a team of four academics. The two questionnaires were worded in German and English for the use of German and British tourists separately. All the questionnaires had an introduction section, presenting the aims of the survey and thanking respondents for taking part. The exact translation of both questionnaires into German was made by a native speaker who was teaching German at Sheffield Hallam University, UK. A copy of each questionnaire format used in this research is shown in Appendix B.

The English and German translation of the final drafts of questionnaires 1 and 2 had been piloted amongst a small number of British and German tourists visiting

Turkey in the summer of 1998 just before the actual survey was conducted. This final pilot survey demonstrated that there were no significant problems with the appropriateness and the clarity of questions.

6.4.1.1.4. Data Collection (Main Survey)

The administration of the data collection stage included the identification of sample populations, the calculation of the sample size and the collection of primary data.

6.4.1.1.4.1. Sample Populations

It is often practically impossible to include the entire population in a questionnaire survey. In such cases, a sampling frame must be chosen (Bryman and Cramer 1990). The sampling frame must be defined within the parameters of the population. For example, if the target is package tourists, the questionnaire must only cover these groups (Lewis 1984). The population size (n) in this research is therefore the number of British and German tourists who stayed in any sort of accommodation and spent a certain period of time in Turkey and Mallorca. It is believed that tourists usually need quite a long time to be able to assess the various amenities on offer (Saleh and Ryan 1992).

In this research, both stratified and systematic sampling methods were applied to collect data, as the target population is overwhelmingly large. In the stratified sampling method, a specific category of population is selected. Following the guidelines of the disproportionate stratified sampling method, only British and German tourists visiting Mallorca and Turkey took part in the questionnaire surveys as they represent the majority of these countries' outbound tourism demand. The sample from this population was selected by a systematic sampling method. Findings of each survey derived from British and German tourists were analysed separately as each attribute of the destination could have different importance and satisfaction measures for different customer groups and the two groups might tend

to complain at a different level of dissatisfaction (Pizam and Milman 1993). It is also highly possible that motivations and the level of tourist expenditure may differ from one group to the other.

6.4.1.1.4.2. Sample Size

The selection of the correct sample size would minimise a possible sampling error. In other words, the larger the sample, the smaller the sampling error and the more accurate the survey (Lewis 1984). Although there are several models to calculate the sample size, the following formula was used, as the reference is basically related to tourism methodology (Ryan 1995b: 177):

$$N = \frac{N(Pq)}{\frac{(N-1)^2 * B^2}{Z^2} + S^2}$$

Here:

- n** represents the sample size
- N** represents the population size
- P** represents the population proportion or estimate (0.5)
- q** is 1-P (0.5)
- B** represents the allowable error (0.049)
- Z** represents the score based on desired confidence level (1.96).

As a consequence of the difficulty in finding accurate statistics for foreign tourists using airlines and staying in resorts, the cumulative number of each sample group visiting Turkey and Mallorca was separately taken into consideration while calculating the average number of the sample population. For example, the average annual number of British tourists visiting Turkey between 1990 and 1997 is 535,681 (see Table 6.3). Then, the sample size (n) will be 399.92.

Table 6.3. Number of British and German Tourists visiting Turkey and Mallorca

Years	Number of British Tourists		Number of German Tourists	
	Turkey ^a	Mallorca ^b	Turkey ^a	Mallorca ^b
1990	351,458	1,216,600	973,914	1,542,300
1991	200,813	1,130,400	779,882	1,697,200
1992	314,608	1,223,500	1,165,164	1,755,800
1993	441,817	1,558,414	1,118,750	2,577,377
1994	568,266	1,679,200	994,301	2,264,900
1995	734,721	1,658,100	1,656,310	2,425,700
1996	758,433	2,595,800	2,141,778	3,130,700
1997	915,337	1,768,100	2,338,529	2,859,700
Mean	535,681	1,603,764	1,396,078	2,281,709

Sources: a Ministry of Tourism, Turkey.
 b Ministry of Tourism, Palma de Mallorca.

Data from only the last three years were taken into account in order to discover whether there was any variance in the calculation of the sample size due to large differences between the minimum and maximum number of tourist arrivals. The estimated result was found to be 403, indicating that there was not much difference between the findings of the two calculations.

The minimum number of the sample to be chosen from British tourists visiting Turkey and Mallorca is about 400. Using the same formula, the minimum sample population to be chosen from German tourists visiting Turkey and Mallorca is 400. However, generally, when using a data set as a subject for statistical analysis, sampling error is expected to decrease as the size of the sample increases (Uhl and Schoner 1969; Hurst 1994; Cannon 1994). Literature suggests a positive relationship between the number of items and the sample size, representing a ratio of at least 1:4 (Tinsley and Tinsley 1987) or 1:5 (Hinkin *et al.* 1997) or more acceptable as a 1:10 (Hair *et al.* 1995). The sample population for each group was therefore raised to a total sample size of over 500. Regarding the adequacy of the sample size, there was a 1:9 ratio of variables to observations, which falls well within acceptable limits as identified by the above references ($1:4 < x < 1:10$).

6.4.1.1.4.4. Primary Data Collection

There are different approaches to investigate how, where and when to measure the level of customer satisfaction or customer experiences in the tourism industry. Some researchers have asked tourists to fill out a questionnaire in order to find

their pre-holiday and post-holiday opinions about a specific destination (Pizam and Milman 1993; Duke and Persia 1996). Others preferred to conduct a survey just after the holiday (Pearce 1980; Chon 1992; Milman and Pizam 1993; Driscoll *et al.* 1994; Vogt and Fesenmaier 1995; Danaher and Arweiler 1996). Haahti (1986) delivered questionnaires while the tourists were still at the destination whilst other researchers suggest that destination satisfaction is best measured after the tourist has completed the tour or service experience (e.g. Pearce 1980; Loundsbury and Hoopes 1985; Danaher and Mattsson 1994).

Though there is no consensus on how to measure customer satisfaction, literature suggests that satisfaction is an overall postpurchase evaluation (Fornell 1992). Literature further emphasises the measurement of customer satisfaction immediately after purchase (Peterson and Wilson 1992). This study therefore proposes that the randomly selected tourists can be approached at the departure airport of each destination just before the end of their holiday during the pre-flight time and questionnaires collected before they board the aircraft in order to obtain fresh feedback about their perceptions of each destination. In so doing, tourists may have available time and the benefit of the entire holiday to assess their perceptions of destination facilities, attractions and customer services, estimate roughly how much they spent in total and keep their complaints, if any, in mind (Stronge 1992). In line with experiences gained from previous empirical investigation (Hurst 1994), it is believed that 'en route surveys' are a cost-effective and popular tool used in tourism and travel research.

This process also applied to the investigation of tourist motivations as no significant difference was observed in previous research between the motivations of respondents to whom questionnaires were presented before their holiday and those of respondents to whom questionnaires were delivered while they were still at the destination (Dann 1977).

Dalaman and Palma are the airports where the questionnaires were administered (see Appendix C for maps). As a result of the nature of the information sought

(personal opinions), tourists completed questionnaires themselves while waiting to fly home. Self-completion questionnaires are believed to get the most reliable responses (Hurst 1994), as respondents have an opportunity to review the completed questionnaire or revisit questions that are not answered initially. Once the researchers had identified themselves, the respondents were given information about the intent and content of the survey. Respondents were assured that the survey was anonymous, confidential and voluntary. Those who consented were given a copy of the questionnaire on a clipboard and a pencil.

Respondents who stayed in private accommodation or with their relatives or friends or were on cruises were not given the questionnaire since this study was focused solely on the holiday experiences of tourists visiting any resort in Mallorca or Turkey. It is important to note that, with the purpose of obtaining different views and avoiding repetition and imitation, the questionnaire was delivered to only one person in each family or group. Tourists who had stayed at least one week on holiday were included in the survey. It is expected that the length of holiday or length of experience with a destination may influence the tourist perceptions of that destination and may also help collect reliable data. Those who were over 15 years old were asked to complete the survey.

Surveys and observations were restricted to a three-week period in each country during the peak-season in the summer of 1998, as mass tourism is significant for Mallorca and Turkey. The questionnaire survey in Turkey was administered in cooperation with two other researchers who had been given instructions on details of questionnaires before the survey was carried out (between 29.6.1998 and 21.7.1998). The survey in Mallorca was completed in the presence of the researcher (between 16.8.1998 and 7.9.1998). Both Turkish and Mallorcan authorities allowed the researcher access to the departure gates.

In Turkey, every n th population was selected for surveys, e.g. the fifth, the tenth. Every tenth passenger was approached and asked which country s/he was from (systematic sampling method). Passengers from the UK and Germany were then

asked if they would like to participate in the survey. All questionnaires, whether completed or not, were returned before passengers embarked.

The sampling procedure was stratified by days of the week to ensure that a sufficient number of questionnaires were obtained when few people were travelling. Tuesday through Friday every 10th passenger was randomly selected, whereas every 20th passenger was randomly selected on Saturdays and Mondays, the busiest days of the week. This flexible technique enabled the researcher to deal better with passengers who had to wait in the queue for check-in and passport control in a bustling atmosphere and warm climate before arriving in the departure lounge. The sample selected in this research represented passengers who boarded the flight during day time between 8.00 a.m. and 9.00 p.m. rather than those who were flying at night or in the early morning. From the point of respondents, it was thought that those who arrived at the destination airport for a day-time departure would be more relaxed and willing to participate in the survey and be less frustrated and confused than those who arrived at midnight or in the early morning. From the point of view of the researcher, access to the airport was easier during the day time. No surveys were conducted on Sundays as there were no flights to the UK or Germany.

In Mallorca, due to the large size of the airport and the high volume of both domestic and foreign tourists, all passengers were being officially reminded both at the check-in desks and by the airport management to check into gates 45 minutes before the aircraft took off. The individual gates designated for each flight facilitated the delivery of the questionnaire survey. A multi-stage sampling method was selected (Robson 1993). This involved three stages. First, a random sample was selected from the total number of daily flights to the UK. Flights flown during the day time (between 9.00 a.m. and 10 p.m.) were sampled in this way. In the second stage, only charter flights were identified. In the final stage, the first ten passengers from each aircraft who came to the departure gate were selected as a sample in order to give them enough time to fill in questionnaires and complete them fully.

The number of flights reached each day was different from one day to another due to the length of time spent at each departure gate. The number of the sample selected from each aircraft depended on how much time was available. Because of the very small number of refusals and questionnaires returned uncompleted, it could be said that this method was fairly successful.

In respect of the application of questionnaire 2 in Turkey, respondents were pre-screened for a recent visit to Mallorca (within the last four years). Only those who had been on holiday in Mallorca within the required period of time were asked to complete the questionnaire.

6.4.1.2. Collecting Secondary Data

One of the methods of benchmarking investigation is to search for the secondary sources of data in order to have a cost-effective study and to investigate in depth the periodical developments in the performance of an organisation or a destination and indicate the possible reasons as to why any destination performs better or worse in any respect (Camp 1989; Watson 1993; Jones 1999). The importance of collecting and interpreting statistical data stems from measuring internal and external performance levels, setting targets, recording developments and comparing results periodically (Bloom 1996).

In this research, the statistical data were used to test the validity of the proposed quantitative measures on the basis of internal and external performance (H_1 and H_4). Internal performance was assessed by interpreting findings compared to previous months or years. External performance was examined by looking at the share of several national tourism figures in the Mediterranean and international tourism activities. The presentation of the analysis of the secondary data may draw a clear picture of the development of tourism industries in Mallorca and Turkey and indicate if there are similarities and/or differences between the two destinations. This section encompasses the assessment of tourist arrivals (market segments), tourism receipts (contribution to the local economy) and accommoda-

tion capacity. The Ministries of Tourism and the World Tourism Organisation (WTO) provided some help to access such data. The findings are presented in Chapter 9. Further secondary data are given in Appendix A.

6.4.2. Application of Qualitative Research Methods

This part of the data collection stage is related to the design of open-ended questionnaires to compare one destination with self-reported multiple destinations and the administration of observations. Although the application of such qualitative methods in benchmarking provides much detail, findings require an objective assessment.

6.4.2.1. Design of Open-ended Questionnaire

This questionnaire (refers to Q 3) was designed to test the hypotheses 1, 2 and partly 4. In the broader context of external destination benchmarking research, a destination needs to be compared with more than two destinations. The destination managers may be able to understand their own performance not only against one specific destination but also against their major competitors. Therefore, the instrument requires that tourists visiting Turkey and Mallorca separately should have been to other places (at least once) in the near past. The time was limited to the beginning of 1995 (the last four years), since respondents might have had difficulty in recalling earlier experiences.

Open-ended questions can be used to collect data regarding both negative and positive comments of customers (Danaher and Haddrell 1996). These could then be compared with the customers' overall evaluation of the service or the destination. Some previous research has been undertaken to investigate tourists' positive and negative experiences (Pearce and Caltabiano 1983; Johns and Lee-Ross 1995; Jackson, White, Schmierer 1996) and their image perceptions of destinations (Reilly 1990) by distributing open-ended questionnaires to allow the respondent to

reply in their own words, but not in an attempt at a direct comparison with other establishments or destinations. Excluding its feature of being open-ended, the idea of this method is similar to questionnaire 2.

The questionnaire instrument consists of nine open-ended questions in total. The first question aims to identify other international resorts (or destinations) sample tourists have visited since the beginning of 1995. The list of all these destinations is useful to produce a competitive set both for Mallorca and Turkey and choose one as a benchmark partner. The second question gives respondents freedom to choose any of those resorts (or destinations) to compare with their holiday in Turkey and Mallorca. Respondents had to choose only one foreign destination for consideration in comparison research. The third question asks for the name of the resort where respondents spent their holidays in Turkey and Mallorca. The fourth question gives an opportunity to understand in what respects their holidays in Turkey and Mallorca were better than the other resort in a different country. In other words, findings are used to measure positive aspects of tourism in Turkey and Mallorca in comparison with some others. These are potential strengths in that Turkey and Mallorca can be selected as the benchmark.

Similarly, the fifth question is related to the measurement of negative aspects of tourism in Turkey and Mallorca in comparison with some of its counterparts. These might be the potential weaknesses that Turkey and Mallorca need to improve in order to increase their competitive position. In the next question, respondents were requested to state the name of the resort which they liked best and the reason(s). This could be helpful in identifying destinations to which respondents may return in the future and reasons that are of importance in attracting tourism. In other words, findings may indicate the strengths of the destinations with which respondents were most satisfied. Although only two destinations are compared in this part of questionnaire, the same method also works effectively for more than two when different customer groups who had been to different destinations are reached and different data collected.

The final three questions related to past experiences with Mallorca and Turkey and repeat tourists' perceptions of changes in the destinations since their most recent visits. The purpose of the seventh question was to state if respondents had been to the destination before, and if so, when. Two open-ended questions were devoted to obtain detailed feedback about repeat tourists' perceptions of attractions, facilities, services and hospitality at the destination, compared with their previous visits and any further comments. Hence, questions eight and nine were designed to identify the ways Turkey (and Mallorca) had changed for the better and/or for the worse since the tourists' last visits.

The pilot questionnaire was completed by ten people working at Sheffield Hallam University, UK as it was shorter and contained open-ended questions and the objective was to check its clarity. The sample was chosen from the university directory and a copy of the questionnaire was sent via the university-based internal mail system. The administration of this questionnaire refers back to the primary data collection stage explained in 6.4.1.1.4.4. A copy of the questionnaire is provided in Appendix B.

6.4.2.2. Site Visits (Observations)

This method was used to obtain the first-hand material to test the hypotheses 2 and 4. As these are recommended for benchmarking individual organisations (Karlof and Ostblom 1993; Jones 1999), site visits provide first-hand information about destinations and offer an opportunity to observe different aspects of destinations, find out the situation in each area or whether there is any difference between these areas (e.g. the availability of facilities and activities, environmental legislation and tourism laws) when benchmarking is carried out between two organisations or destinations operating in different countries. Camp (1989) states that direct site visits are the most credible method in benchmarking, as an opportunity is created to prepare a checklist indicating what has and has not been done. Site visits organised in the 1950s between US and Japanese businesses led them to gain new ideas and successful results in their operations. Pizam (1994b) further

states that observations, both participant and nonparticipant, are a part of research technique to observe objects and subjects in their natural surroundings. The researcher has the ability to obtain first-hand knowledge by watching, rather than receiving reports prepared by others.

Benchmarking could concentrate not only on measuring outcomes (identifying standards of performance measurement) but also on examining processes as to how the product is produced (practices). Measuring the level of performance seems to be an inadequate way to investigate in depth the reasons for any anticipated gap. Practice or process benchmarking may help to present the answer(s) to this. Camp (1989) therefore suggests that both are essential criteria in benchmarking, but the former (performance benchmarking) should be followed by the latter (process/practice benchmarking).

Although it is difficult to quantify the results of observations, they could still be used as ingredients when interpreting the findings of both primary and secondary sources of data. Observations are sometimes regarded as an alternative method of data collection and sometimes as a supplementary method depending on the type of research (Moser and Kalton 1971; Robson 1993). This research considered observations as a supplementary method. During the period of this research, two visits to Turkey and two to Mallorca were organised to compare and contrast similarities and differences between the two destinations from the researcher's points of view and to observe their overall positions and how each was performing. Observations took place in the resorts of Santa Ponsa, Magaluf, Palma, Can Pastilla, Soller and Alcudia in Mallorca in August 1998 and October 1999. Site visits were arranged to the resorts of Marmaris, Sarigerme and Fethiye, located in the south-west part of Turkey, in July 1998 and August 1999. Notes derived from observations were incorporated into the analysis of primary data and are presented in the discussion section (Chapter 10). During observations, several photographs were also taken to demonstrate certain characteristics of the sample destinations.

6.4.3. Analysis of Data

Once the data are collected, they need to be categorised and analysed. Data collected through questionnaires 1 and 2 were analysed by employing the Statistical Package for the Social Sciences (SPSS) computer program as this is a comprehensive and flexible statistical analysis and data management system. Moreover, it can generate tabulated reports, charts and complex statistical analyses. In addition, the analysis was supported by the outcome of the general views of respondents who filled in questionnaire 3. Secondary data (metric data) of one destination were compared with those of another on the basis of months or years and nationality. Methods used for the analysis primary data are explained below.

6.4.3.1. Reliability Assessment

A reliability analysis (Cronbach's alpha) was performed to test the reliability and internal consistency of each of the 55 destination attributes in questionnaires 1 and 2. A reliability score shows 'the degree to which measures are free from error and therefore yield consistent results' (Peter 1979: 16). Coefficient alpha is one of the most useful approaches to assessing the reliability of measurement scales and is a measure of internal consistency reliability (Peter 1979; Churchill 1979). A low coefficient alpha indicates that the instrument performs poorly in capturing the anticipated outcomes, while a large coefficient alpha indicates that the instrument correlates well with the true items and scores (Churchill 1979).

6.4.3.2. Validity Assessment

Validity assessment examines whether the scale measures what it purports to measure (Czepiel *et al.* 1974; Churchill 1979). Concurrent and predictive validity tests were conducted to investigate the extent to which the instrument measured what it was intended to measure (Carmines and Zeller 1979). Concurrent validity is assessed by correlating a measure and the criterion at the same point in time, provided that the criterion exists in the present. In this research, concurrent valid-

ity refers to the relationship between individual items (or the scale) and the measurement of overall tourist satisfaction, as a sign of current performance. Predictive validity concerns a future criterion, which is correlated with the relevant measure, e.g. intention for word-of-mouth recommendation and repeat business within this research, as a sign of future performance (Moser and Kalton 1971).

Where quantitative research techniques are employed and the structured questionnaires with scales are used, both reliability and validity assessments will be significant in designing effective and valid destination benchmarking research in order to be sure that findings are accurate and to discuss further implications. No such reliability and validity test is statistically possible for open-ended questionnaires or interviews.

6.4.3.3. Other Statistical Tests

A series of chi-square tests was applied in order to investigate if there were any statistical differences between independent (nominal) variables such as socio-demographic and holiday-taking behaviour of each tourist group visiting Mallorca and Turkey. A series of chi-square tests and regression analysis were utilised to assess the expenditure patterns of sample groups. Similarly, an independent t-test was performed to investigate if the scores of motivation and satisfaction items of each customer group and destination were statistically different from the other (gap analysis).

Before commencing the analysis of data in respect of tourist satisfaction measurement and its comparison between two destinations, the destination attributes that had a very high correlation with other variables were excluded from the further stage of data analysis in case of any multicollinearity effect. Multicollinearity effect relates to the patterns of the correlation among three or more variables (Hair *et al.* 1995). The extent to which an independent variable is associated with other independent variables has the ability to influence the predictive power of the independent variable. If the correlation value is very high, this may distort the find-

ings; therefore, the variable needs to be eliminated. The threshold was decided by the researcher since the literature does not suggest any certain cut-off point.

Factor analysis was then performed to identify the group of motivations and the group of destination satisfaction attributes. The consideration of factor analysis is a significant procedure while carrying out both internal and external benchmarking. Examining the correlation or relationships between items, factor analysis demonstrates the extent to which questions seem to be measuring the same variables and the degree to which they could be reduced to a more general and smaller set of factor attributes. Having been accepted as a helpful statistical tool for assessing the reliability and validity of empirical measures (Carmines and Zeller 1979), factor analysis has been found to be a useful method in assessing tourist motivations and measuring tourist satisfaction, as the tourism product or the holiday experience is made up of many interrelated components such as accommodation, food and drink, recreation and so on (Pizam *et al.* 1978).

An exploratory factor analysis was performed to reduce the number of attributes and subgroup them into a meaningful set of data. The factors extracted via this method are uncorrelated and are arranged in order of decreasing variances. Bartlett's test of sphericity and the calculation of Kaiser-Meyer-Olkin statistics indicate if the data are suitable to identify orthogonal factor dimensions. Principal component and varimax rotation procedures were used to identify orthogonal factor dimensions. The reason for selecting orthogonal factor solution was that it was regarded as the most appropriate approach to reduce a large number of variables to a smaller set of uncorrelated dimensions for subsequent use in a regression analysis (Hair *et al.* 1995).

Principal component factors with an eigenvalue of one or greater were rotated by the varimax analysis as it is a simple approach to interpret the findings. Variables with loadings equal or greater than .35 were included in a given factor to decrease the probability of misclassification. Identification of significant factor loadings is based on the sample size (Hair *et al.* 1995). A lower factor loading can be taken

into account as sample size increases. For instance, factor loadings of minimum .30 are regarded as acceptable for a sample size of 350 and greater. As finding a factor structure with few items (one or two) for each factor is not regarded as being very useful and successful (Spector 1992), this process continued to have at least three items for each factor grouping.

Multiple regression was subsequently used to determine the aggregate impact of certain destination attributes on the four performance measures in respect of overall satisfaction and future behaviour. This procedure was earlier suggested in this research as a measure of internal benchmarking. This method demonstrates the strength of any variable in the overall model which aims to predict either overall satisfaction or the intention for the future behaviour in consumer research. One advantage of using multiple regression measures (R^2 values) is to assess the convergent validity of the performance-only based survey instrument (Crompton and Love 1995). For each performance factor, the technique of least-squares was used to estimate the regression coefficients (b_i) in an equation of the form:

$$Y = a + b_1x_1 + b_2x_2 + \dots + b_nx_n$$

where Y is the predicted performance (dependent variable), a is the constant value, b_i is the beta coefficient values for each independent variable and shows the correlation between the dependent variable and each of the independent variables. It also represents the expected change in the performance indicator associated with a one-unit change in the i th independent variable when impacts of the other variables in the model are held constant. x is the mean score of each independent variable. The dependent variables of the regression model were the level of tourists' overall satisfaction with their holiday experiences in Mallorca and Turkey, their intention of recommending their holidays to their friends and relatives, their intention to revisit the same resorts as well as their intention to visit other resorts in Mallorca and Turkey. The orthogonal factors were the independent variables of each model.

A stepwise selection method was used to determine the list of independent factor variables to include in the final regression equation for each of the four performance indicators (Norusis 1985). The feature of this method is that it selects variables in the model that starts with the best predictor of the dependent variable and excludes those which are statistically not at the significance level.

Results of each process are reported in a table, along with the *t* statistics, standardised regression coefficients and R^2 values. Each table presents the significant variables that remained in the equation and which explain tourist satisfaction in order of their importance based on standardised beta coefficient values. Standardised estimate (beta coefficients) of each variable reflects the relative importance of each independent factor variable. In other words, the larger the estimate, the higher the importance of variables in the overall model. The value of R^2 shows how well the model fits the population. The higher the value of R^2 , the better the predictor of the model. Likewise, the lower the value of R^2 , the worse the predictor. The tolerance values indicate the degree of standard error in the model. The large tolerance values refer to the low level of standard error which is a credit to the success of the model.

This type of analysis may indicate the strength of each destination attribute (factor items) within a destination benchmarking investigation. In other words, the stronger an attribute, the better it is performing and is considered as a strength or competitive advantage. Findings may be useful to formulate some recommendations regarding a marketing strategy that destination authorities should consider in efforts to improve the performance of their facilities and services.

6.4.3.4. Content Analysis

Content analysis is a method for use in analysing open-ended questionnaire data as well as documents (Robson 1993). Content analysis was therefore employed in this research to analyse qualitative data derived by distributing the open-ended questionnaire (Q 3). The analysis of the open-ended questionnaire provides lists of

words (or items) in the space provided for each question. These items were ordered according to the number of times that they appear. The frequency values were then calculated for each item by dividing each value by the total size of the sample population in each tourist group. Responses were ranked in order of the percentage value. The higher the percentage value, the better the factor (or item) was considered by respondents for the question designed to demonstrate how likely the destination was perceived to be better than other destinations. In contrast, the higher the percentage value, the worse the factor (or item) for the question designed to demonstrate how likely the destination was perceived to be worse than other destinations. A similar method was also used for the assessment of comments and the repeat tourists' perceptions of changes in sample destinations. Also, some direct quotations from the open-ended questionnaire were inserted into appropriate points to emphasise some of the differences.

6.5. Overall Analysis

The outcome of overall analysis is expected to make a contribution to the overall performance analysis of competitiveness and destination management. The findings of primary research including observations could illustrate the areas where gap(s) appear and weaknesses and complaints can be addressed, whereas those of secondary research along with observations could identify the root causes of problems in one destination and examples of good practice in another, if any. Providing background to improve services and establish positioning strategies, all the results may be incorporated into one setting to produce an overall picture from the destination benchmarking perspective. Nevertheless, the methodology suggested in this research is only capable of identifying the list of those which need to be benchmarked, but may be, to some extent, unable to present practical guidelines on how to achieve performance improvement on the basis of practice/process studies. This requires further methodology research such as interviews with tourists, authorities and tourism stakeholders at destinations.

6.6. Summary

This chapter has aimed to demonstrate the design and approach to data collection for decision-making and problem-solving in destination benchmarking research. General guidelines for the application of qualitative and quantitative data collection methods have been provided and a structured approach to the formulation, estimation and interpretation of data analysis presented by following a five-stage model building framework: reviewing the literature, formulating conceptual approach, collecting data, analysing data, and presenting concluding remarks, limitations and recommendations. As the next stage of the study, the following three chapters will present the findings based upon the analysis of both primary and secondary data. The next chapter is devoted to the analysis of primary research findings including both qualitative and quantitative measures.

Chapter Seven

Analysis of Data I

7.0. Introduction

This chapter presents an analysis of empirical findings of qualitative and quantitative measures derived from three different questionnaire surveys carried out amongst British and German tourists in Mallorca and Turkey. The chapter begins with the analysis of the distribution of questionnaires by nationality and sample destinations. The similarities and differences between the demographic profile and holiday-taking behaviour of the sample population are then examined. The analysis of motivations and their comparison on the basis of cross-cultural differences and between destinations is made in the next stage. The factors influencing the level of tourist satisfaction and future behaviour are investigated (internal benchmarking). This was followed by a further analysis of tourist satisfaction research in order to explore if there is any difference between two destinations (external benchmarking) and also between two nationalities (cross-cultural comparison). The analysis of tourists' comments and the repeat tourists' perceptions of positive and negative trends in respects of the facilities, attractions and services is also included in this section (internal benchmarking). The findings of the tourist expenditure survey are presented in the subsequent part (external benchmarking). The last section is devoted to the competitor and performance analysis by considering some other self-selected tourist destinations (external benchmarking).

7.1. Analysis of Data

Data were collected from eight independent sample populations of British and German tourists visiting Turkey and Mallorca, with a total sample size of 2,582.

Table 7.1 reports the distribution of questionnaires by nationality and sample destinations. In Mallorca, the total number of questionnaires delivered was 1,178. Of those returned (1,167), 41 questionnaires were eliminated. After elimination, 1,126 questionnaires were coded for data analysis (95.6%). In Turkey, the total number of questionnaires delivered was 1,618. Of those returned (1,551), 95 were eliminated. The remaining 1,457 questionnaires were coded for data analysis (90%). Those questionnaires eliminated were incomplete or had an excessive amount of missing data. The high response rate is an indicator of how successful the survey was (Uhl and Schoner 1969).

Table 7.1. Distribution of Questionnaires by Nationality and Sample Destinations

	British Sample			German Sample			Total 1+2+3
	Q 1	Q 2	Q 3	Q 1	Q 2	Q 3	
<i>Mallorca</i>							
Approached	508	---	352	520	---	---	1,380
N/A (or refusals)	16	---	154	32	---	---	202
Delivered	492	---	198	488	---	---	1,178
Returned	488	---	198	481	---	---	1,167
Eliminated	23	---	4	14	---	---	41
Analysed	465	---	194	467	---	---	1,126
<i>Turkey</i>							
Approached	550	622	322	511	646	---	2,651
N/A (or refusals)	5	382	124	31	491	---	1,033
Delivered	545	240	198	480	155	---	1,618
Returned	531	231	184	461	144	---	1,551
Eliminated	20	18	18	32	7	---	95
Analysed	511	213	166	429	137	---	1,456
Total	976	213	360	896	137	---	2,582

--- Respondents were not available.

The largest sample was questionnaire 1, which consisted of 898 subjects surveyed in Turkey and 881 subjects in Mallorca, in order to investigate their motivation, the satisfaction perceptions of their individual holiday experiences, their comments on improving tourism products and their expenditure levels within particular resorts in Turkey and Mallorca.

The sample of questionnaire 2 consisted of 214 British and 137 German subjects visiting Turkey on that occasion, but who have also been to Mallorca in the last four years. Such a large sample size may suggest that both Mallorca and Turkey fall into the same competitiveness set for summer tourism in the Mediterranean basin. The purpose of this comparison survey was to investigate the extent to which

the findings of the first survey could be empirically supported and subsequently, to explore how it would be placed in destination benchmarking research.

The sample of questionnaire 3 consisted of only British tourists visiting Turkey (n=166) and those visiting Mallorca (n=194). No random sampling method was conducted for questionnaire 3 because the prime purpose was to approach and get feedback from as many respondents as possible. The purpose of this survey was to investigate the competitive position of Turkey and Mallorca not only against each other but also against other major destinations on the basis of several attributes yielded from the analysis of an open-ended questionnaire. The investigation of repeat tourists' perceptions of positive and negative changes in destinations compared to their last visits in the preceding years was the next objective.

Data were analysed in several stages. The respondents were divided into groups of nationalities. Percentage scores for nominal variables and mean scores for ordinal variables were calculated for each nationality. However, regarding comparison of motivation and satisfaction scores, the responses of two tourist groups with respect to all sample destinations were combined and included in the same factor analysis (Noe and Uysal 1997; Baloglu and McClary 1999a; Bloemer, Ruyter and Wetzels 1999). Factor labels were then used for the analysis of findings for each destination. This technique has the advantage of presenting all factor labels with their same item structures for a comparison on the same figure. The labelled factors, their eigen values, the percentage of variance, alpha and probability values explained by each are presented in Appendix D.

7.2. Analysis of Sample Profile

The analysis of profiles of sample population comprises the comparison of British and German tourists visiting the same destination and also of those visiting Mallorca and Turkey independently on the basis of demographic and holiday taking patterns. The research objective is to see if there is any difference in the sample

population's characteristics between Mallorca and Turkey and between British and German tourists. A chi-square (χ^2) test was used to test if differences between two groups are statistically valid. Findings are expected to provide baseline data at the beginning of the destination benchmarking process. The analysis of findings refers to data yielded from the administration of questionnaire 1. A list of details about sample profile and sizes is presented in D1 to D5 (Appendix D).

The analysis of sample profiles of tourists visiting Mallorca and Turkey revealed the existence of differences between tourists who were from the same country and visiting two different destinations and between tourists who were from different countries and visiting the same destination on the basis of several independent variables. In comparison with British tourists in Turkey, those in Mallorca had a higher number of repeat visits, a greater likelihood of choosing half-board and self-catering accommodation, a holiday of less than two weeks, booked their holidays more than seven months in advance, paid more for package tours, had higher annual income and had a higher proportion of companions both over 15 years old and children.

In comparison with German tourists in Turkey, those in Mallorca were less likely to book all-inclusive holidays, stay in holiday villages and book their holidays over four months ahead, but more likely to stay less than two weeks and to represent lower income and younger age groups. No significant difference was recorded for the independent variables such as the amount of tour prices, number of repeat visits to the particular resorts and to Mallorca and Turkey overall, ranking of the resort on the choice list, and gender.

On the basis of comparison between the two samples in Mallorca, British tourists had a higher tendency to buy all-inclusive and self-catering holidays, stay for two weeks, stay in apartments, choose their first destination and book their holidays earlier, represent older age groups, have a higher number of repeat visits and to travel with more companions, both adults and children. No difference was recorded

for such variables as gender and the number of repeat visits to the same resort in Mallorca.

Comparison between British and German tourists in Turkey indicated that the latter group was more likely to choose all-inclusive and half-board holidays, stay in hotels, stay between 8 and 13 days or between 15 and 20 days. They booked their holidays earlier, returned more often, had less intention of choosing Turkey as a first destination and were more often accompanied by children. No significant difference was found to exist for such variables as age and the number of people whose age was over fifteen ($p > .05$). This means that the distribution of these independent variables for each sample group was similar.

7.3. Analysis of Motivations

The objective of this part is to investigate if motivations differ from one destination and from one group of customers to another, and if so, in what respects. The analysis of data refers to the findings of questionnaire 1. In order to compare each group's motivation scores consistently, the data from the four samples were aggregated (Noe and Uysal 1997; Baloglu and McClary 1999a; Bloemer *et al.* 1999). Fifteen items loaded saliently on any of the four factors that emerged with eigenvalues greater than one and explained 56% of the variance in the data. The calculation of Kaiser-Meyer-Olkin statistics indicated that the data seemed suitable for factor analysis. Most of the factor loadings were greater than .60, indicating a good correlation between the items and the factor grouping they belong to. The estimates of reliability of the factors were .71 (factor 1), .58 (factor 2), .46 (factor 3) and .62 (factor 4).

Variables such as 'to increase knowledge of new places', 'to visit historical and cultural places' and 'to meet local people' were closely related to the first factor 'culture'. Variables such as 'to have fun', 'to mix with fellow tourists', 'to seek adventure' and 'to get away from daily life' were associated with the second factor

entitled 'fantasy'. Including variables such as 'to relax', 'to refresh memories', 'to enjoy good weather' and 'to spend time with people deeply care about', the third factor might be interpreted as measuring the respondents' intention to experience 'pleasure and relaxation'. Physical, the fourth factor, describes the profile of respondents on the basis of nature and sports. Variables attaining to this factor were 'to engage in sports', 'to be active' and 'to get close to nature'. The results of the factor analysis and the breakdown of factor variables are presented in Table D6.

7.3.1. Analysis of Motivations between Two Destinations

An independent t-test was run on the factors as well as on the individual items to test the significance of differences between sample groups on push motivations. A great difference was found to exist between the cultural motivations of British tourists visiting Turkey and those visiting Mallorca which shows that the former had stronger cultural motivations than the latter (Table D7). Given this, Turkey seemed to be the better destination to experience meeting local people, increasing their knowledge of new places and visiting cultural and historical sites. All tests of significance were performed at $p < .001$. Similarly, fantasy-based motivations of those who visited Turkey were higher than those in Mallorca ($p < .001$). Among the relaxation motivations was to enjoy good weather, which had higher scores for those in Mallorca than those in Turkey ($p < .05$). The remaining motivators remained insignificant indicating that both tourist types had similar relaxation motivations almost at the same level ($p > .05$), e.g. relaxing, spending time with people they cared deeply about and being emotionally and physically refreshed. The intention of those visiting Turkey to get close to nature ($p < .001$), engage in sports ($p < .01$) and be active ($p < .05$) was higher than those in Mallorca. Overall physical motivations of British tourists visiting Turkey were higher (mean=3.38) than those in Mallorca (mean=2.92), but not statistically significant ($p > .05$).

It is important to note that the relatively lower mean scores for both destinations proved that they were not attractive in the physical motivations for British tourists

in the summer season. In short, Turkey, with its higher mean scores, seemed to be much more attractive than Mallorca for British tourists whose motivations were mostly culture and fantasy. Though any statistical difference was not recorded between Turkey and Mallorca, relaxation and pleasure motivations with their high mean scores were also important to both destinations.

A great difference was recorded between the cultural motivations of German tourists visiting Mallorca and Turkey in the summer ($p < .001$). The average mean score for this motivation was 3.94 for those visiting Mallorca and 4.83 for those visiting Turkey (Table D8). The second largest difference was recorded between the physical motivations of German tourists visiting sample destinations ($p < .01$). The overall mean score for this motivation item was 4.00 for those in Mallorca and 4.44 for those in Turkey. This means that Turkey was more likely to be regarded as a destination for German tourists to meet their physical motivations than Mallorca. The overall mean scores of the remaining two motivations such as fantasy and relaxation and pleasure did not show any significant difference ($p > .05$). This means that both tourist groups had similar fantasy-based and relaxation pleasure motivations while visiting either Turkey or Mallorca in the summer, although it is a fact that relaxation and pleasure motivations were ranked as the highest and fantasy-based motivations as the lowest for both destinations. In summary, in comparison with those in Mallorca, German tourists visiting Turkey had stronger motivations to visit historical and cultural sites, increase their knowledge of new places, meet local people, get close to nature, engage in sports, be active and seek adventure.

7.3.2. Analysis of Motivations between Two Nationalities

In terms of differences between nationalities, the survey results indicate that there is a difference based on fantasy, relaxation and pleasure and physical motivations between British and German tourists to travel to Turkey in the summer season. Table D9 shows that individual motivations of German tourists travelling to Turkey did appear to be for cultural and physical reasons. Relaxation and pleasure, and

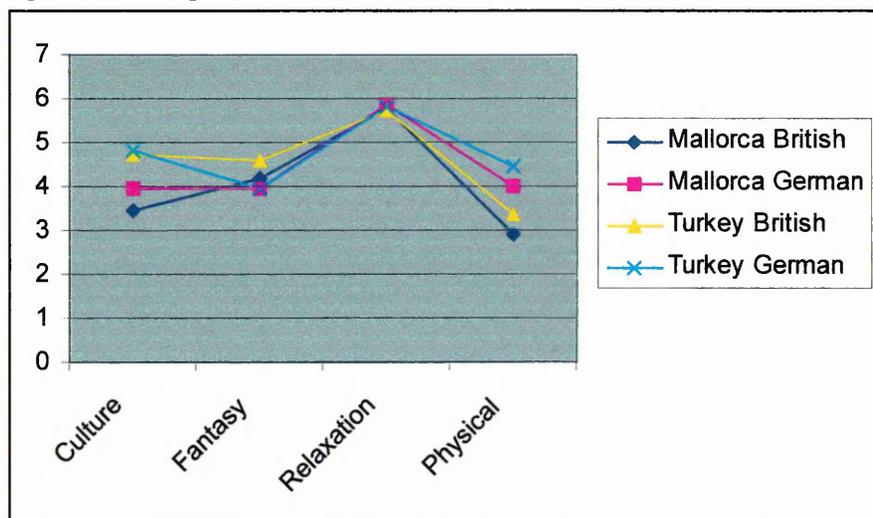
physical motivations had higher mean scores for German tourists than for British tourists ($p < .001$). The former motivations were clustered in the group of highest mean scores, indicating that the prime reason for both groups to visit Turkey was to meet their relaxation and pleasure motivations such as being emotionally and physically refreshed, spending time with people whom they deeply cared about, relaxing and enjoying good weather.

The findings of the comparative analysis of motivations for Mallorca were reported in Table D10. The largest difference was found in the physical motivations of both groups visiting Mallorca ($p < .001$). These motivations had the second highest mean scores (4.00) for German tourists and the lowest for British tourists (2.92). The second largest difference existed between the fantasy-based motivations of the sample groups ($p < .001$). British tourists had higher mean scores than did German tourists for this motivation item. Sub-groups of fantasy-based motivations such as seeking adventure, having fun and getting away from home did not have any significant difference in their mean scores for British and German tourists ($p > .05$). The intention of British tourists to mix with other fellow tourists was likely to be higher than that of German tourists ($p < .01$). Cultural motivations of the German sample were higher than those of their British counterparts ($p < .001$). Little difference was found to exist between relaxation and pleasure motivations of these groups ($p < .01$). Generally speaking, beyond the relaxation and pleasure motivations as a prime reason for both groups to visit Mallorca, significant differences were recorded between fantasy, cultural and physical motivations of British and German tourists visiting Mallorca as a summer vacation destination.

In summary, with few exceptions, this research demonstrated that people from the same country but travelling to different destinations may have different motivations. For example, British tourists in Turkey had stronger cultural, physical and fantasy-based motivation scores than those in Mallorca. Similarly, German tourists in Turkey had stronger cultural and physical motivations than those in Mallorca, e.g. visiting historical and cultural sites, increasing knowledge of new places,

meeting local people, getting close to nature, engaging in sports, being active and seeking adventure. These findings attract attention to the perceived differences between Turkey and Mallorca and provide valuable implications for destination benchmarking. The cultural and physical attractiveness of Turkey as a summer holiday destination is higher than that of Mallorca (see Figure 7.1). For both destinations, relaxation and pleasure type of motivations were ranked as the most important factor while travelling. However, as Crompton (1979) notes, socio-psychological motives (such as fantasy, and relaxation and pleasure in this research) are unrelated to destination attributes whereas cultural motives (including physical motives in this research) can be partially destination-based.

Figure 7.1. Comparison of Motivations of British and German tourists



7.3.3. Analysis of Open-ended Questions

The list of self-reported motivation variables collected from an open-ended question in questionnaire 1 was cross-tabulated using chi-square test as the analysis is based on a frequency count. In this research, as reported in Table D11, accommodation (different aspects of accommodation facilities such as service level, swimming pool, self-catering, half-board or full-board), weather, level of prices (cost), location of destination (or resort) and access to the sea and beaches were the most

significant reasons given by British tourists for visiting both Mallorca and Turkey. Weather, access to the sea and beaches, the length of flight time (accessibility of the destination), level of prices (cost) and the location of the destination/resort were respectively the most important reasons for German tourists choosing Mallorca. Weather, access to the sea and beaches, level of prices, people/culture and scenery and landscape were respectively the five most important reasons for those choosing Turkey.

It appears that each destination has its own unique attractiveness. For example, the differentiating destination attributes for Turkey were the level of prices/costs, people and culture, and scenery and landscape. Those for Mallorca were accommodation facilities, being family-oriented, availability of the sea/beaches, availability and suitability of nightlife and entertainment and the relatively shorter flight time compared to Turkey (Tables D12 and D13). Some differences between nationalities in relation to pull motivations also appeared in this research. The level of prices, the type of accommodation available and access to the sea and beaches were the major differences between British and German tourists choosing Turkey (Table D14). Further comparison between British and German tourists in Mallorca demonstrated that British tourists had much higher percentiles than their German counterparts for the type of accommodation, the availability of facilities and catering for families. As a way of contrast, the latter group had higher percentiles than the former group for the length of flight time, access to sea and beaches, weather, scenery and landscape and the availability of sport facilities (Table D15).

As for the limitations of the analysis of motivations as qualitative measures of benchmarking, two main concerns can be listed. First, factor items had a low reliability value meaning that the number of items needs to be increased to obtain better results. Next, differences were observed between two nationalities and between two destinations for independent variables. It seems to be difficult to argue how much these differences had affected the results.

7.4. Analysis of Tourist Satisfaction

The analysis of tourist satisfaction with Mallorca and Turkey is undertaken in terms of both internal and external performance measures of destination benchmarking. The findings are expected to be useful for testing all the four hypotheses. The first part presents the reliability and validity assessment of destination items used for measuring tourist satisfaction and comparison analysis. The next part evaluates the findings of factor and regression analysis as a contribution to the qualitative measurement of internal destination performance. The third part examines the findings of both individual and comparison questionnaires by considering mean scores of each individual and factor item as a part of external performance measurement of destinations. In the final part, using the findings of both methods, it is expected to understand to what extent there are cross-cultural differences on the basis of tourist groups for the related destination attributes.

7.4.1. Reliability and Validity Assessment of Items

The first stages in the analysis of the questionnaire design in respect of tourist satisfaction measurement are the assessment of item-total correlation, reliability and construct validity. This stage is significant in designing effective and valid tourist satisfaction research, as a part of the proposed qualitative measures, in order to ensure that findings are accurate and to be able to discuss further implications for destination benchmarking research. The findings of the reliability and validity assessment of questionnaire 1 are reported in Table 7.2. The first row in the table shows the Cronbach's alpha values for the four sample groups. When all four groups are examined simultaneously, the alpha values range from .95 to .96, which are highly reliable. The reliability scores for all scales exceeded the minimum standard (.80) suggested by Nunnally (1978) and were much greater than those presented in some other surveys (Oh and Parks 1997). The high level of reliability score indicates that the sampling domain has adequately been captured.

Table 7.2. Reliability and Validity Assessment of Questionnaire 1

Reliability and Validity Measures	Mallorca		Turkey	
	British	German	British	German
Reliability (internal consistency of the scale)	.96	.95	.96	.96
Convergent validity (overall satisfaction)	.74	.61	.66	.73
Predictive validity (word-of-mouth recommendation)	.66	.59	.67	.60
Predictive validity (intention to revisit same resort)	.61	.52	.59	.59
Predictive Validity (intention to visit other resorts)	.38	.15	.40	.23

Construct validity was examined by assessing the relationship of the scale with other constructs or indicators such as convergent and predictive validity (Churchill 1979). To test for convergent (concurrent) validity, the instrument included a global measure of overall tourist satisfaction. Respondents were asked overall how likely they were satisfied with their holiday in Turkey or Mallorca. The Pearson correlation coefficient between the scale index and the global measure was .74 for British tourists visiting Mallorca, .61 for Germans visiting Mallorca, .66 for British visiting Turkey and .73 for Germans visiting Turkey. As a positive relationship existed between the two measures, convergent validity was demonstrated.

To assess predictive validity, respondents were asked about their future intentions to recommend their holidays and revisit the destination. The scale applied amongst German tourists in Mallorca was closely correlated with the respondents' willingness to recommend their holidays ($r=.59$) and correlated with their willingness to return in the future ($r=.54$). Similarly, the scale designed to measure British tourists' satisfaction with their holidays in Mallorca was highly correlated with the respondents' willingness to recommend their holidays ($r=.66$). Though the scale in Mallorca was highly correlated with the respondents' willingness to return to the same resort ($r=.61$), it had a lower correlation with the intention to visit other places in Mallorca ($r=.38$). The scale designed to measure the satisfaction levels of German tourists visiting Turkey was also highly correlated with the respondents' intention to recommend their holidays ($r=.60$) and return ($r=.59$). The scale designed to measure German tourists' intention to visit other resorts in Mallorca and Turkey had a very low correlation value ($r=.15$ and $r=.23$ respectively). Finally, the scale designed to measure British tourists' satisfaction levels with their experiences on vacation in Mallorca was positively related to the respondents' likelihood to

recommend their holidays ($r=.67$). It was highly correlated with the willingness to return to the same resort ($r=.59$) and moderately correlated with the willingness to visit other places in Turkey ($r=.40$). The inspection of all these findings indicates that the scales that aimed to measure British and German tourists' perceptions of satisfaction levels with their holidays in Mallorca and Turkey are reliable and valid, with the exception of the scale measuring the intention to visit other places.

As Table 7.3 shows, both English and German versions of the scales of questionnaire 2 were found to be internally reliable ($r=.93$ and $.92$ respectively). The variety of food at accommodation facilities and the attitude of local people towards female tourists had the lowest value of the correlation with the scales designed to be delivered amongst British and German tourists respectively. The availability of facilities on beaches and the availability of sports facilities and activities were respectively represented with the highest correlation values. Although the scale conducted amongst the German sample population had high validity scores, there appears to be a problem with the validity of the scale representing the British sample population, except for correlation between the intention of word-of-mouth recommendation and the scale.

Table 7.3. Reliability and Validity of Questionnaire 2

Reliability and Validity Measures	British	German
Reliability (internal consistency of the scale)	.93	.92
Convergent validity (overall satisfaction)	.48	.71
Predictive validity (word-of-mouth recommendation)	.61	.66
Predictive validity (repeat visit intention)	.37	.62

As for the design of questionnaire 2, the reliability is more important than its validity as the primary purpose was to measure external performance of the destination by supporting the findings of previous questionnaire rather than measuring internal performance.

7.4.2. Tourist Satisfaction as a Measure of Internal Performance

This section seeks to analyse the internal performance of destinations in four ways as a measure of current and future performance: overall satisfaction, word-of-

mouth recommendation, intention of revisiting the same resort and intention of visiting other resorts in the same area. The reason for this type of application was that each destination should be considered with its own customers rather than performing a direct comparison research activity (gap analysis between destinations) due to the possibility of differences in the type of customers each destination attracts. Both factor and regression analyses were used to carry out the analysis. Analysis of data gathered from the British sample in Mallorca produced eight factors explaining 64.7% of the variance in the data. The results from the German sample in Mallorca produced nine factors explaining 69.9% of the variance in the data. The results of factor analysis performed for the British sample in Turkey produced eight factors explaining 65.1% of the variance. Finally, seven factors were extracted from data representing the German sample population in Turkey, explaining 64.4% of the variance.

A multiple regression was subsequently used to determine the aggregate impact of certain independent variables (destination attributes) exerting the strongest influence in dependent variables. This method demonstrates the strength of any variable in the overall model which aims to predict either overall satisfaction or the intention for the future behaviour in consumer research (Hallowell 1996; Noe and Uysal 1997; Bloemer and Ruyter 1998). The findings of regression analysis is summarised in Table 7.4 while the rest of others are presented in appendix (see Tables D16 to D39).

Table 7.4 presents the significant variables that remained in the equation and which explain tourist satisfaction in the order of their importance based on standardised beta coefficient values. The table shows that out of eight dimensions, only six were the most critical to the level of overall satisfaction of British tourists in Mallorca. These are natural environment, hospitality, facilities and activities, level of prices, accommodation services, and hygiene and cleanliness. Of the nine factors, the availability of facilities and activities I carries the heaviest weight in explaining the level of satisfaction of German tourists in Mallorca.

Table 7.4. Summary of Regression Test Findings

Summary Questions	Turkey			Mallorca		
	British	German	British	British	German	German
Overall Satisfaction	1. Accommodation services (.387)	1. Accommodation services (.370)	1. Natural environment (.368)	1. Natural environment (.368)	1. Facilities and activities I (.287)	1. Facilities and activities I (.287)
	2. Level of prices (.295)	2. Hospitality (.327)	2. Hospitality (.353)	2. Hospitality (.353)	2. Hygiene and cleanliness (.282)	2. Hygiene and cleanliness (.282)
	3. Hospitality (.264)	3. Level of prices (.317)	3. Facilities and activities (.332)	3. Facilities and activities (.332)	3. Accommodation services (.260)	3. Accommodation services (.260)
	4. Hygiene and cleanliness (.242)	4. Facilities and activities (.264)	4. Level of prices (.323)	4. Level of prices (.323)	4. Hospitality (.200)	4. Hospitality (.200)
	5. Nightlife and entertainment (.184)	5. Local transport services (.249)	5. Accommodation services (.276)	5. Accommodation services (.276)	5. Level of prices (.175)	5. Level of prices (.175)
	6. Facilities and activities (.152)	6. Language communication (.199)	6. Hygiene and cleanliness (.232)	6. Hygiene and cleanliness (.232)	6. Facilities and activities II (.174)	6. Facilities and activities II (.174)
	7. Local transport services (.098)	7. Hygiene and cleanliness (.165)				
Intention to Recommend	1. Hospitality (.359)	1. Level of prices (.395)	1. Natural environment (.339)	1. Natural environment (.339)	1. Hospitality (.303)	1. Hospitality (.303)
	2. Accommodation services (.319)	2. Hospitality (.381)	2. Level of prices (.337)	2. Level of prices (.337)	2. Hygiene and cleanliness (.277)	2. Hygiene and cleanliness (.277)
	3. Level of prices (.263)	3. Facilities and activities (.251)	3. Hospitality (.302)	3. Hospitality (.302)	3. Accommodation services (.233)	3. Accommodation services (.233)
	4. Nightlife and entertainment (.251)	4. Local transport services (.171)	4. Facilities and activities (.249)	4. Facilities and activities (.249)	4. Level of prices (.184)	4. Level of prices (.184)
	5. Hygiene and cleanliness (.148)	5. Accommodation services (.160)	5. Hygiene and cleanliness (.232)	5. Hygiene and cleanliness (.232)	5. Facilities and activities I (.162)	5. Facilities and activities I (.162)
	6. Local transport services (.138)	6. Hygiene and cleanliness (.136)	6. Accommodation services (.221)	6. Accommodation services (.221)	6. Facilities and activities II (.146)	6. Facilities and activities II (.146)
	7. Facilities and activities (.134)		7. Resort airport services (.094)	7. Resort airport services (.094)		
	8. Resort airport services (.115)					
Intention to Return to Same Resort	1. Level of prices (.313)	1. Level of prices (.356)	1. Natural environment (.365)	1. Natural environment (.365)	1. Hygiene and cleanliness (.321)	1. Hygiene and cleanliness (.321)
	2. Hospitality (.298)	2. Hospitality (.355)	2. Level of prices (.286)	2. Level of prices (.286)	2. Facilities and activities I (.226)	2. Facilities and activities I (.226)
	3. Nightlife and entertainment (.246)	3. Facilities and activities (.285)	3. Facilities and activities (.263)	3. Facilities and activities (.263)	3. Accommodation services (.222)	3. Accommodation services (.222)
	4. Accommodation services (.216)	4. Language communication (.198)	4. Hospitality (.263)	4. Hospitality (.263)	4. Facilities and activities II (.178)	4. Facilities and activities II (.178)
	5. Facilities and activities (.182)	5. Local transport services (.150)	5. Accommodation services (.212)	5. Accommodation services (.212)	5. Level of prices (.166)	5. Level of prices (.166)
	6. Hygiene and cleanliness (.133)	6. Hygiene and cleanliness (.133)	6. Hygiene and cleanliness (.200)	6. Hygiene and cleanliness (.200)	6. Hospitality (.135)	6. Hospitality (.135)
	7. Resort airport services (.107)					
Intention to Visit Other Resorts	1. Hospitality (.231)	1. Level of prices (.258)	1. Resort airport services (.188)	1. Resort airport services (.188)	1. Level of prices (.182)	1. Level of prices (.182)
	2. Resort airport services (.188)	2. Hospitality (.176)	2. Natural environment (.143)	2. Natural environment (.143)	2. Hospitality (.154)	2. Hospitality (.154)
	3. Local transport services (.175)		3. Local transport services (.143)	3. Local transport services (.143)	3. Facilities and activities I (.149)	3. Facilities and activities I (.149)
	4. Hygiene and cleanliness (.161)		4. Hospitality (.132)	4. Hospitality (.132)		
	5. Level of prices (.131)					
	6. Nightlife and entertainment (.122)					

Note: Beta coefficient value for each item is shown in parentheses.

The results reveal that British tourists consider seven factor variables as the most influential in determining their overall satisfaction with Turkey. These are accommodation services, level of prices, hospitality, hygiene and cleanliness, nightlife and entertainment, facilities and activities and local transport services. Finally, seven factors were important determinants of German tourists' overall satisfaction with Turkey. These are accommodation services, hospitality, level of prices, facilities and activities, local transport services, language communication, and hygiene and cleanliness. All these findings show that multiple attributes affect the level of tourist overall satisfaction.

The regression analysis showed that all eight factors were significant indicators of word-of-mouth recommendation intention of British tourists in Turkey. These are respectively hospitality, accommodation services, level of prices, nightlife and entertainment, hygiene and cleanliness, local transport services, facilities and activities, and resort airport services. As far as the intention of German tourists in Turkey for word-of-mouth recommendation was concerned, level of prices was the most significant item, followed by hospitality, facilities and activities, local transport services, accommodation services, and hygiene and cleanliness. Excluding one item, seven items loaded in the model for a similar relationship in explaining the intentions of British tourists in Mallorca. These items were respectively listed as natural environment, level of prices, hospitality, facilities and activities, hygiene and cleanliness, accommodation services, and resort airport services. Out of nine factors, six were found to be statistically significant for a similar relationship for German tourists in Mallorca. These factor items were hospitality, cleanliness, accommodation services, level of prices, facilities and activities I and II. The first three had higher impact than the last three items.

The majority of items significantly influenced the tourists' intentions of coming back to the same resort in the future. The level of prices and hospitality were the strongest two items for the British and German samples in Turkey as they had lower weight for the German sample in Mallorca. Natural environment and the

level of prices were the top two significant items affecting the repeat visit behaviour of British tourists in Mallorca. All these findings suggest that, as in overall tourist satisfaction and recommending behaviour, the tourists' repeat visit behaviour is influenced by their perception of the performance of multiple items within the destination. There is an imbalance distribution between four groups of customers in terms of their intentions of visiting other resorts in the sample countries. Six items significantly loaded in the model for British tourists in Turkey while only two items for German tourists (level of prices and hospitality). British tourists in Mallorca had four (out of eight) and German tourists had three items (out of nine).

As shown, multiple attributes affect the level of tourist overall satisfaction, word-of-mouth recommendation and repeat visit intention. Each factor item has contributed at different levels to each analysis and each tourist group sample, but it is clear that accommodation services, level of prices and hospitality were the top three core competencies of Turkey for the British and German markets whereas in Mallorca natural environment, level of prices and hospitality were the most important ones for the British market and the availability of facilities and activities, cleanliness and accommodation services for the German market. In terms of the cross-cultural comparison between the two groups, it appears that British and German tourists perceived different attributes to affect most strongly the level of their overall satisfaction and future behaviour. This type of method measuring internal performance is also capable of revealing the weakest elements of a destination, e.g. the resort airport for British tourists and hygiene and cleanliness for German tourists in Turkey. It could be suggested that such an analysis could identify those attributes where attention must be paid or a destination benchmarking study should be taken on.

As for the limitation of this method, it is possible to observe that the loading of an item on a factor heading could differ from one customer group to another. For example, the item of signposting to tourist attractions in the resort loaded on 'nature and environment' in the factor analysis of British tourists as on 'accommodation

services' in the factor of analysis of German tourists both in Mallorca. It is difficult to anticipate the extent to which this was reflected to the result. Next, the assessment of regression model findings is difficult to apply to each way of measurement for each customer group. While one attribute may be vitally important and affect the future behaviour of one group, it may be of no significance for its overall satisfaction level. A decision will therefore need to be made about which measurement should be a priority. Once the purpose is to investigate the factors affecting the current performance, the association between individual attributes and overall satisfaction could be examined. When the purpose is to make tourists come back or tell others about the destination (future performance), then the relationship between the individual attributes and the intention to return or between the individual attributes and the intention for word-of-mouth recommendation could be assessed.

7.4.3. Tourist Satisfaction as a Measure of External Performance

In this section, performance gap analysis method developed within the most common benchmarking approach is applied. The individual tourist perceptions of satisfaction with several categories in general and with specific attributes in Mallorca and Turkey are compared by using an independent t-test to investigate in what respects one destination was perceived by the actual customers to be better than another. In addition, the findings of questionnaire 2 are also examined to test the validity of those of questionnaire 1. The term 'comparison' indicated on each table refers to the findings of questionnaire 2 which was conducted in Turkey based on a five-point comparison scale where 'five' indicates 'in comparison with Mallorca, X in Turkey was/were much better/cheaper', 'three' 'in comparison with Mallorca, X in Turkey was/were about the same' and 'one' 'in comparison with Mallorca, X in Turkey was/were much worse/more expensive'. The higher the mean scores of any attribute over 'three', the better it is perceived to be in Turkey than it was in Mallorca. Similarly, those figures below 'three' in Turkey are assumed to be much worse or worse than others in Mallorca.

As in the assessment of tourist satisfaction surveys presented in earlier sections of this chapter, the values of correlation coefficient matrix were taken into account in this section to avoid those variables with high correlation (with .65 and over). These are the quality of the resort's bars and restaurants, quality of accommodation, variety of food at accommodation, variety of food at the resort's bars and restaurants, service quality of the resort's bars and restaurants, atmosphere of the resort, willingness of local people to help foreign tourists, comfort of travelling between the resort airport and the resort, response to guest complaints, and response to guest requests. In line with comments in earlier studies (Noe and Uysal 1997; Baloglu and McClairy 1999a; Bloemer *et al.* 1999), the factor analysis was conducted on the pooled data set from the responses to all two destinations and two groups. Only two items (weather and cleanliness of the resort airport) did not load any factor groupings. The comparison of analysis of this section and the subsequent section refers to the findings of 44 variables. Bartlett's test of sphericity and the calculation of Kaiser-Meyer-Olkin statistics indicated that data seemed suitable to identify factor dimensions. Eight factors were extracted, explaining 64% of the total variance. These are accommodation services, local transport services, hygiene and cleanliness, hospitality and customer care, availability of facilities and activities, level of prices, language communication, and resort airport services. The findings are presented in the appendix (see Tables D40 to D57). Mean difference test was used to identify the significance of gaps for each item.

A chi-square test-analysis was performed to investigate if there was any difference between independent (nominal) variables of the sample population who filled in questionnaires 1 and 2 in Turkey. Results indicated no significant difference amongst British tourists on the basis of the number of past visits to Turkey, the level of household income, the type of holiday and accommodation, the length of holiday, the ranking of Turkey on the choice list and gender ($p > .05$). However, those taking part in questionnaire 1 were likely to be younger ($p < .01$) and book earlier ($p < .05$) than those participating in questionnaire 2.

Similarly, no significant difference was recorded to exist amongst the German sample population of questionnaires 1 and 2 for all independent variables ($p > .05$). These findings confirmed that the sample population representing both types of questionnaires had similar socio-economic and holiday-taking characteristics, and data were comparable. A further chi-square test cannot be employed to investigate the existence of any differences in the independent variables between sample population representing surveys carried out in Mallorca as questionnaire 2 was administered only in Turkey.

7.4.3.1. Comparison between Mallorca and Turkey by British Tourists

In the investigation of differences in performance levels between Mallorca and Turkey from the British tourists' point of view, findings are summarised in Table 7.5. There was no difference in the average perceived mean scores of accommodation services between Mallorca and Turkey although the latter was slightly higher than the former and the comparison research gave a positive result in favour of Turkey ($p > .05$). The average mean scores of the availability of facilities and activities were higher in Turkey than in Mallorca, but not statistically significant ($p > .05$). In this group, the availability of facilities for children was the only attribute found to be more satisfactory by those in Mallorca than those in Turkey. The difference in the satisfaction levels between two groups with the availability of local transport services was ranked as the largest amongst all eight categories, which is in favour of Turkey ($p < .001$). Given the second largest, difference between overall mean scores in favour of Turkey, the category of hospitality and customer care was the second most important satisfactory attribute for those in Turkey ($p < .001$).

The category of facilities and services at the resort airport was found by those visiting Mallorca to be slightly more satisfactory than those in Turkey ($p < .001$). This is also supported by the comparison survey. The level of hygiene, sanitation and cleanliness in Turkey was found to be slightly more satisfactory than in Mallorca ($p > .05$). The findings of the comparison research demonstrated that the attributes

of this category were perceived to be slightly better in Turkey than Mallorca. The level of prices was found to be one of the three most satisfactory attributes in favour of Turkey with its large difference of mean scores ($p < .001$). Average mean scores of the comparison research in general and in particular with specific attributes were much higher, supporting the above result. Finally, the level of language communication in English in Turkey seems to be performing slightly better than in Mallorca, but statistically not significant ($p > .05$).

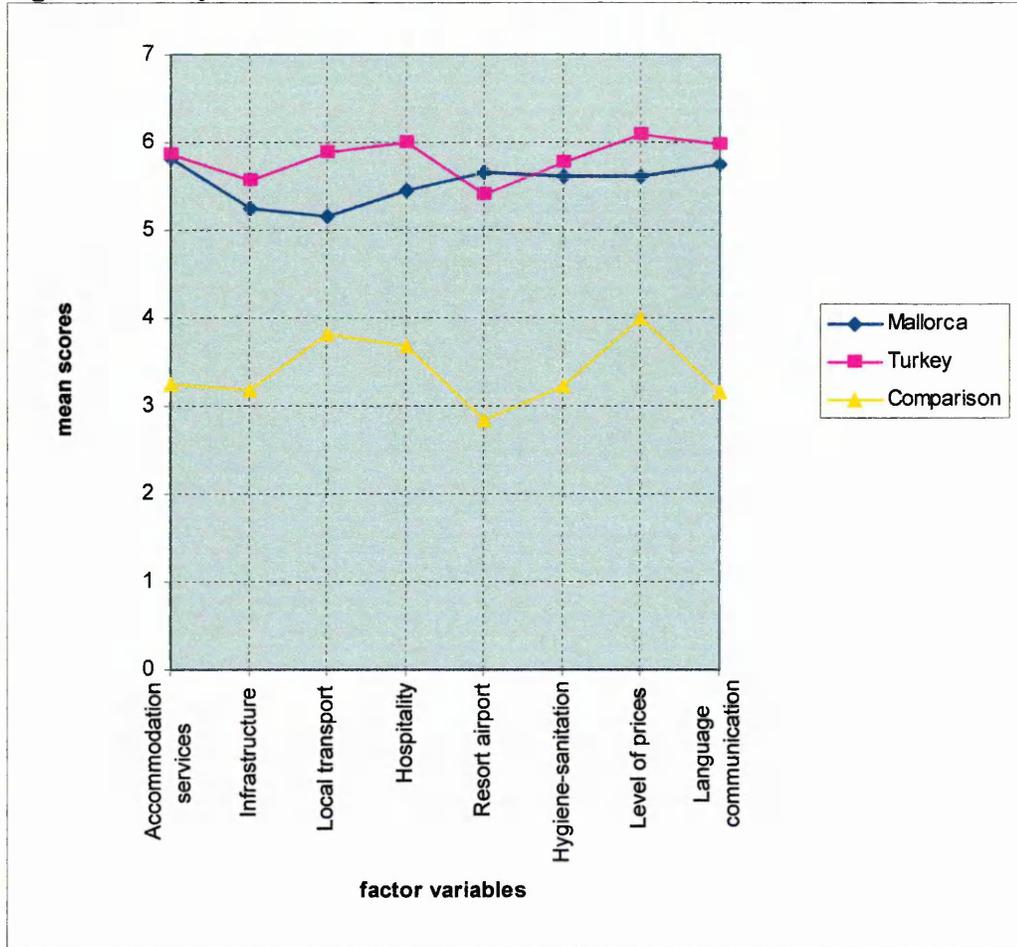
Table 7.5. Comparison between Mallorca and Turkey by British Tourists

Attributes	Mallorca	Turkey	t value	p	Comparison
Accommodation services	5.81	5.87	1.54	.124	3.24
Facilities and activities	5.25	5.57	-1.52	.089	3.18
<i>Local transport services</i>	<i>5.15</i>	<i>5.88</i>	<i>-10.61</i>	<i>.000</i>	<i>3.81</i>
<i>Hospitality and customer care</i>	<i>5.45</i>	<i>6.01</i>	<i>-6.15</i>	<i>.000</i>	<i>3.68</i>
Facilities at the resort airport	5.66	5.42	6.14	.000	2.85
Hygiene, sanitation and cleanliness	5.62	5.78	1.66	.097	3.22
<i>Level of prices</i>	<i>5.62</i>	<i>6.10</i>	<i>-5.16</i>	<i>.000</i>	<i>4.01</i>
Level of language communication	5.75	5.98	-1.07	.067	3.17

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute. Number in bold indicates that Mallorca performed significantly better than Turkey on that attribute.

As Figure 7.2 shows, the findings of questionnaires 1 and 2 were consistent with each other in exploring whether one destination is performing better or worse than another in some respects. Significant differences emerged at the .001 level between the two destinations on five of the eight satisfaction items. The largest gap appeared between the performance of Turkey and Mallorca for local transport services, hospitality and customer care, and level of prices, which was in favour of Turkey. With smaller gaps, Turkey further performed better on attributes such as infrastructure facilities, hygiene-sanitation-cleanliness, level of language communication and accommodation services although the gaps were not supported, resulting in statistically insignificant. This means that Turkey was as good as Mallorca or vice versa in terms of offering accommodation services, tourist facilities and activities, hygiene and cleanliness, and language communication. The only attribute in Mallorca found to be slightly better than in Turkey was the level of facilities and services at the resort airport.

Figure 7.2. Comparison between Satisfaction Levels of British Tourists



7.4.3.2. Comparison between Mallorca and Turkey by German Tourists

Table 7.6 presents the findings of performance evaluation from the German tourists' point of view. Accommodation services were given higher mean scores by those in Turkey than their counterparts in Mallorca and supported by the comparison research indicating that these attributes performed over 'about the same' in favour of Turkey ($p < .001$). The category of hospitality and customer care in Turkey was more likely to be satisfactory and better than Mallorca ($p < .01$). The availability of local transport services was one of the most significant destination attributes of Turkey for German tourists as it was for British tourists ($p < .001$). The findings of both questionnaire surveys were consistent with each other and indicated that this attribute was found to be more satisfactory and better in Turkey than in Mallorca. In considering the average mean scores of the availability of facilities and

activities, the difference between satisfaction levels of German tourists was slightly in favour of Turkey and the findings of the comparison research corresponds with this statement ($p=.05$). Considering the analysis of data derived from both types of questionnaires, those who have been to Turkey were more likely to be satisfied with the level of hygiene, sanitation and cleanliness in the resorts of Turkey than those in Mallorca ($p<.01$). The findings suggest that the level of prices was another very significant attribute of the resorts in Turkey ($p<.001$). Unlike attributes discussed earlier, the attributes of language communication and the availability of facilities and services at the resort airport were found to be less satisfactory and slightly worse in Turkey than in Mallorca ($p<.001$). The mean scores of both questionnaires were in favour of Mallorca.

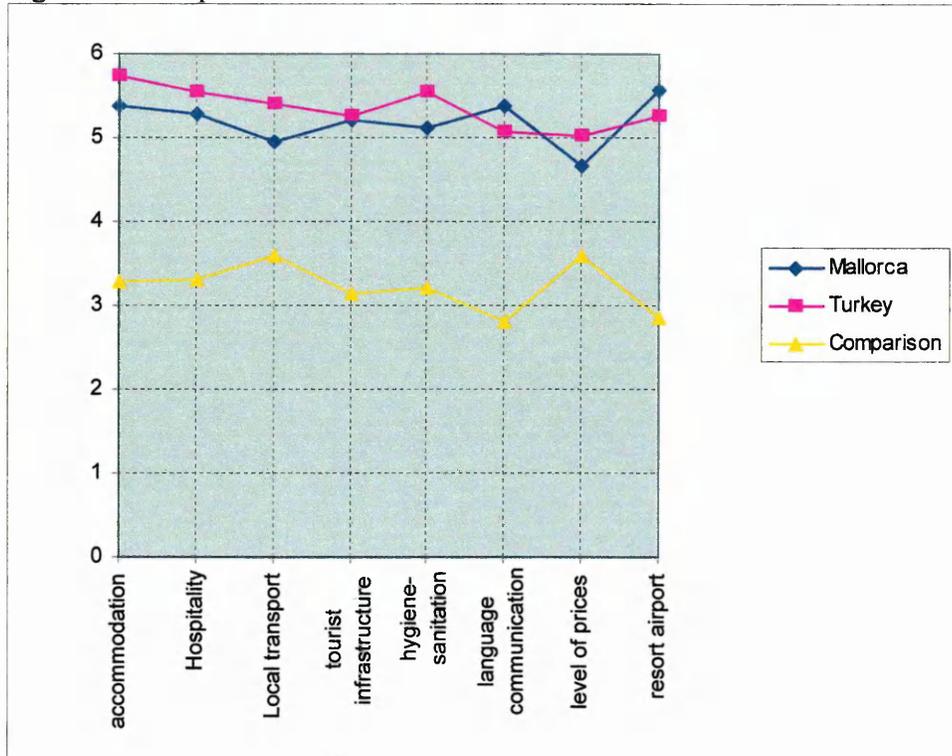
Table 7.6. Comparison between Mallorca and Turkey by German Tourists

Attributes	Mallorca	Turkey	t value	p	Comparison
<i>Accommodation services</i>	5.39	5.74	-3.91	.000	3.28
<i>Facilities and activities</i>	5.22	5.26	1.97	.050	3.14
<i>Local transport services</i>	4.96	5.41	-5.86	.000	3.60
<i>Hospitality and customer care</i>	5.29	5.55	-3.24	.001	3.30
Facilities at the resort airport	5.57	5.27	4.55	.000	2.85
<i>Hygiene, sanitation and cleanliness</i>	5.13	5.54	-3.14	.002	3.22
<i>Level of prices</i>	4.66	5.03	-4.29	.000	3.59
Level of language communication	5.38	5.08	5.15	.000	2.80

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute. Number in bold indicates that Mallorca performed significantly better than Turkey on that attribute.

Figure 7.3 shows a summary of the entire analysis of the comparison of German tourists' satisfaction levels with Mallorca and Turkey. The findings of questionnaires 1 and 2 were also consistent, as they were for the analysis of British tourists' satisfaction levels. Significant differences were found between the two destinations on all of the satisfaction items. Accommodation services, hospitality and customer care, local transport services, availability of facilities and activities, hygiene-sanitation-cleanliness, and level of prices were the attributes where Turkey was perceived by German tourists to be performing better than Mallorca. In contrast, the level of language communication, and the level of facilities and services at the resort airport were found to be better in Mallorca.

Figure 7.3. Comparison between Satisfaction Levels of German Tourists



In conclusion, findings provide grounds to speculate that the higher the satisfaction scores in Turkey, the better the resorts in Turkey performed than those in Mallorca. Any possible disagreement concerning the validity of these findings could be underestimated as these are what the three different types of questionnaires recorded and the three different tourist groups observed. These findings therefore provide grounds to suggest use of direct comparison surveys while measuring the performance of two destinations in an external benchmarking study.

7.4.4. Comparison between Two Nationalities

This part of the research considers the analysis of tourist satisfaction on the basis of cross-cultural differences in eight factor variables identified by performing factor analysis with the aggregate data. The factor labels were accommodation services, local transport services, hygiene-sanitation-cleanliness, hospitality and customer care, facilities and activities, level of prices, language communication, and facilities and services at the resort airport. The analysis of surveys sought to in-

investigate whether any cross-cultural differences between tourists' perceived satisfaction levels with their holiday experiences at the same destination is important to the decision-making process of destination management regarding the implementation of destination positioning and market segmentation strategies whilst conducting benchmarking studies.

In this study, the analysis of comparison refers to the differences between German and British tourists' satisfaction levels with their summer holiday experiences in Turkey (Table D58). Similar analysis is also applied to the differences between British and German sample populations' satisfaction levels in Mallorca (Table D59). A series of independent t- statistical tests were applied to investigate if there had been any difference between mean scores of the two sample populations. Findings are assessed separately for each factor item.

British tourists were more likely to be satisfied with almost all attributes found to be statistically significant at any probability level ($p < .05$ or much higher) than German tourists visiting both Mallorca and Turkey. Exceptions were the quality of food at the accommodation facilities and at the resort's bars and restaurants in Turkey, and the availability of daily tours to other resorts and main tourist attractions in Mallorca. Overall, the largest gaps between German and British tourists' satisfaction levels appeared for the level of language communication and level of prices in Turkey and for the level of prices, level of hygiene, sanitation and cleanliness, and accommodation services in Mallorca, all were in favour of British tourists.

7.5. Level of Future Behaviour and Intention

The objective of this section is to examine how likely actual tourists are to come back and recommend their holiday experiences to their friends and relatives and how likely these findings change from one destination to another or from one group of customers to another. An independent t-test was employed to investigate if any statistically significant differences existed between the intention of those in

Mallorca and in Turkey. Findings indicate that both British and German tourists in Turkey were more likely than those in Mallorca to recommend their holidays ($p < .01$). This finding is congruent with that of the comparison research (questionnaire 2) conducted amongst those who visited both destinations ($p < .001$). British tourists in Turkey had higher mean scores than those in Mallorca to revisit the same resort in the future ($p < .001$). This finding corresponds with that of the comparison research ($p < .001$). The comparison research also shows that German tourists had a higher intention to revisit the same resort in Turkey ($p < .001$). Both groups were more likely to visit other resorts in Turkey than those in Mallorca. These findings suggest that Turkey had a better impression than Mallorca although mean scores for both destinations were high. A higher level of tourist overall satisfaction in Turkey could support this view. There was no much difference in the level of future behaviour and intention between British and German tourists.

7.6. Analysis of Tourist Comments

The analysis of comments is based on the findings of a questionnaire survey (Q 1) in which respondents were asked to indicate destination attributes that need to be improved. Findings refer to feedback received separately from British and German tourists visiting Mallorca and Turkey (Table D60). As the detailed information was given in Chapter 6, items were ordered according to the number of times that they appear. The frequency values were then calculated for each item by dividing each value by the total size of the sample population in each tourist group. Responses were ranked in order of the percentage value. Chi-square test was performed to explore if any differences exist between two destinations and between two sample groups on the basis of comments for improvement of destination attributes.

The following conclusion can be reached when all attributes are ranked on the basis of their percentage weightings by each customer group in Mallorca and Turkey (internal benchmarking). Overall cleanliness of resorts, attitude of shopkeepers, level of prices, attitude of local people, food and local transport services were

ranked by British tourists in Mallorca as the first six most significant attributes to which priority should be given. Level of prices, overall cleanliness of resorts, availability of sport facilities and activities, food, quality of accommodation facilities and natural environment were the first six most significant attributes in Mallorca which German tourists expect to be improved. Overall cleanliness of resorts, attitude of shopkeepers (harassment), signposting, facilities and services at the resort airport, food, and attitude of local people and staff were the first six most important attributes emphasised by British tourists in Turkey. Language communication, attitude of shopkeepers, level of prices, overall cleanliness of resorts, signposting and quality of accommodation facilities were the first six attributes in Turkey stated by German tourists as needing improvement.

Where comparison between Mallorca and Turkey is concerned (external benchmarking), British tourists were more concerned about level of prices, local transport services, natural environment, quality of services at bars and restaurants in Mallorca than those in Turkey. The amount of difference for these three attributes was less than five percent. Those in Turkey had higher percentiles with signposting, facilities and services at the resort airport, harassment and the lack of air-conditioning systems than those in Mallorca. The difference for these three attributes was approximately five percent. There was little difference for overall cleanliness of resorts, variety and quality of food, feelings of safety and security, language communication, quality of accommodation facilities, availability of sport facilities and activities and the remaining attributes. In comparison with those in Turkey, German tourists in Mallorca were more concerned about the overall cleanliness of resorts, level of prices, variety and quality of food, natural environment, feelings of safety and security, quality of accommodation facilities, availability of sport facilities and activities and cleanliness of beaches. Attitude of shopkeepers, language communication and availability of facilities and services at the resort airport were the major concerns of German tourists visiting Turkey compared with those visiting Mallorca. There was no such difference for the attitude of local people, local transport services and signposting. These findings were largely congruent with

those of other two questionnaire surveys discussed above and differences between Mallorca and Turkey.

As far as comparison between two nationalities is concerned, differences were found to exist between British and German tourists. For instance, German tourists in Mallorca were concerned more about the overall cleanliness of resorts, level of prices, quality and variety of food, the attractiveness of natural environment, signposting, quality of accommodation, availability of sports facilities and activities, language communication and feelings of personal safety and security whereas British tourists were more keen on the further improvement of the attitude of shopkeepers and local people in Mallorca. Similar differences were recorded between those who visited Turkey. German tourists were more likely to be keen on the overall cleanliness of resorts, attitude of shopkeepers, level of prices, language communication and quality of accommodation facilities. British tourists specifically emphasised the 'harassment' problem in Turkey.

These findings demonstrate that some attributes stated as needing improvement were related to a particular destination such as language communication in German, availability of facilities and services at the resort airport, availability of air-conditioning systems and signposting in Turkey; and natural environment, quality of accommodation facilities and availability of sport facilities and activities in Mallorca. Moreover, both destinations had a high level of comments about similar attributes such as overall cleanliness of resorts, attitude of shopkeepers and local people and level of prices, although some differences existed between tourists in Turkey and Mallorca for such attributes.

7.7. Repeat Tourists' Perceptions of Changes

The purpose of this section was to consider the repeat tourists' perceptions of changes in respect of the performance of sample destinations by examining under two categories such as positive (or better) and negative (worse). Data were col-

lected by administering an open-ended questionnaire (Q 3). Respondents were asked to indicate in which respects they had noticed any significant differences in comparison to their previous holidays. The attributes which were found to be better and worse than previous years were then ranked on the basis of percentage scores. No statistical test was applied because data were evaluated within a single destination (internal benchmarking).

About two-thirds of the sample population of British tourists had at least a previous experience in Mallorca (67%) whereas one-third of those travelling to Turkey had at least a previous experience in Turkey (36.7%). According to their perceptions, airport facilities and services, road and traffic conditions and cleanliness were the most important three attributes which were believed to have been improved both in Mallorca and Turkey (Table D61), but with a higher percentage volume in favour of Mallorca. Such destination attributes as people, accommodation facilities, shopping and other facilities, language communication, service, catering for families, exchange rates, food, value for money, beaches, facilities on beaches, air-conditioning, water supply quality, safety and nightlife/entertainment were amongst others. Albeit a very small sample, these are potential benchmark elements to which customers give priority and therefore should be taken into account. As far as tourist perceptions of negative changes in Turkey are concerned, over-commercialisation and its subsequent results such as busy atmosphere, overdevelopment and an increase in the number of buildings were the most significant problems which need to be taken into consideration (Table D62). It is clear that these are the direct consequences of attempts to become a mass tourist destination. Those with smaller observation values do not seem to be creating any problem at the moment, but attention should be paid to improve them before the number rises.

7.8. Analysis of Tourist Expenditure

This section of the destination benchmarking study was devoted to the analysis of findings of an empirical investigation (Q 1) which aims to measure and compare

British and German tourists' total holiday expenditure levels while in Mallorca and Turkey. Findings are expected to be useful not only for illustrating the profile of those visiting both destinations on the basis of the amount of overall spending and its distribution on various tourism products and services such as food and drink, transport and entertainment, but also for identifying potential areas benchmarking studies could be conducted on. The amount of the total expenditure, excluding package tour prices (flight and accommodation), were calculated by asking respondents the amount of money they spent in total and based on each of six main categories such as food and drink, souvenirs and gifts, visiting attractions (charges), clothes, local transportation, and day trips and rent-a-car services.

Along with the line of the suggested procedures in Chapter 6, findings were analysed in two steps. First, mean scores were calculated to estimate how much each group spent in total and for each category. The share of each category in total spending was calculated in percentiles by using mean scores. These findings were assessed using the mean difference (t) test to make a comparison between each tourist group. This research took total spending into account rather than the average scores per person or per day due to multiple variables. A similar approach was followed by Spotts and Mahoney (1991).

Second, each category of expense was divided into five sub-categories in order to indicate the level of spending such as little (light), lower medium, medium, upper medium and high (heavy) spenders. Light spenders were those who spent less than £250 for British tourists and less than 750 DM for German tourists. Lower medium spenders were those who spent between £250 and £499 for British and between 750 and 1499 DM for German. The range of medium spending was £500 and £749 for British and 1500 and 2249 DM for German tourists. Upper medium spenders were those who spent between £750 and £999 for British and between 2250 and 2999 DM for German. Finally, high spenders were defined as those who spent over £1000 for British and over 3000 DM for German tourists. Findings were then cross-tabulated to investigate if there was any difference between the

amount of each tourist group's spending for each category on the basis of significance level of a chi-square statistical test at .05 or higher.

Although considerable differences were observed between two destinations in terms of several socio-demographic and socio-economic characteristics of tourists and their numbers, there was no much difference in the amount of their total spending. No much difference was found between a similar comparison of British tourists' spending in Mallorca (£209,223) and Turkey (£220,371). The amount of German tourists' total spending in Mallorca (534,390 DM) was more than that in Turkey (497,578 DM), but statistically insignificant. There was no significant difference between the average mean scores, either. These findings suggest that data are comparable to carry out further stages of analysis, as a contribution to the external destination benchmarking approach.

7.8.1. British Tourists' Expenditure Levels

Table 7.7 shows that the amount of average spending by British tourists in Mallorca was £617 and £602 in Turkey. Those who were in Mallorca spent 55% of their holiday budget on the consumption of food and beverages, whereas this was nearly 44% in Turkey ($p < .001$). Unsurprisingly, British tourists in Turkey spent three times more than those in Mallorca on buying clothes, e.g. leather ($p < .001$). No substantial differences between the two segments were found in terms of the distribution of souvenirs and gifts, charges for visiting tourist attractions and local transport expenses and between overall spending ($p > .05$).

Table 7.7. Distribution of Tourist Expenditure (by sub-categories and destinations)

Sub-Categories	Mallorca (£)			Turkey (£)			t value	Sig. t
	Mean	Total	%	Mean	Total	%		
Food and drink	343.2	114,771	54.8	258.7	97,128	44.0	19.522	.0000
Souvenirs and gifts	92.8	31,251	14.9	91.4	31,765	14.4	.028	.8657
Visiting attractions	41.0	12,677	6.0	34.4	12,788	5.8	1.838	.7755
Clothes	19.1	6,299	3.0	58.2	20,586	9.3	6.200	.0000
Local transportation	17.3	5,675	2.7	20.4	7,467	3.4	1.615	.2041
Day trips and rent-a-car	39.3	13,995	6.7	21.1	15,540	7.0	.087	.7682
Total	617.2	209,223	88.1	602.8	220,371	83.9	.292	.5890

Note: Categories do not add up to the total because of missing observations and exclusion of other expenses.

However, the findings of the cross-tabulation analysis indicated that there were differences between expenditure patterns of British tourists in Mallorca and Turkey for local transport services, day trips and rent-a-car services, and buying souvenir and gifts (Tables D63 to D69). Although the proportion of low spenders for souvenirs and gifts in Turkey was slightly higher than those in Mallorca, there was also a greater distribution of heavy spenders in Turkey than in Mallorca ($p < .05$). Those in Turkey were more likely than those in Mallorca to spend on local transport services ($p < .001$), and day trips and rent-a-car services ($p < .05$). The proportion of low spenders in Turkey for food and beverage consumption was higher than in Mallorca. As expected, British tourists in Mallorca in the same category was higher than in Turkey ($p < .001$). Those in Turkey spent more than did those in Mallorca on buying clothes ($p < .001$). The results of the chi-square test also confirmed that the level of differences between the two destinations on the basis of total spending and charges for visiting tourist attractions was statistically insignificant ($p > .05$).

7.8.2. German Tourists' Expenditure Levels

Table 7.8 shows that German tourists visiting Mallorca spent an average of 1349 DM and those in Turkey 1362 DM. As can be seen, there is no significant gap between the expenditure patterns of these two groups. One might speculate that German tourists are likely to spend the same amount of money while on holiday either in Mallorca or in Turkey. This speculation also applies to British tourists.

Table 7.8. Distribution of Tourist Expenditure (by sub-categories and destinations)

Sub-Categories	Mallorca (DM)			Turkey (DM)			t value	Sig. t
	Mean	Total	%	Mean	Total	%		
Food and drink	617.9	244,905	45.8	404.6	142,443	29.5	16.807	.0000
Souvenirs and gifts	135.9	54,343	10.1	234.1	82,405	17.0	12.913	.0003
Visiting attractions	94.9	37,716	7.0	49.8	17,555	3.6	10.371	.0013
Clothes	54.2	21,499	4.0	151.8	53,357	11.0	41.981	.0000
Local transportation	32.9	13,062	2.4	49.2	17,327	3.6	5.038	.0251
Day trips and rent-a-car	176.0	70,430	13.1	154.9	54,546	11.3	1.249	.2640
Total	1349	534,390	82.4	1362	482,080	76.0	.0324	.8571

Note: Categories do not add up to the total because of missing observations and exclusion of other expenses.

Considering the distribution of total spending by each sub-category, the percentage of spending on food and drink is 46% in Mallorca and 30% in Turkey. Thus, those

in Mallorca were likely to spend more on food and beverages than those in Turkey. Similarly, those in Mallorca spent much more on visiting attractions than those in Turkey ($p < .01$). German tourists in Turkey spent more than their counterparts in Mallorca on local transport services, buying souvenirs and gifts and clothes. The first three categories on which German tourists in Mallorca spent more were food and beverages, day trips and rent-a-car and souvenirs and gifts, in terms of internal ranking by each category respectively. Food and drink, souvenirs and gifts and day trips and rent-a-car were respectively the first three categories for those in Turkey.

These results were further confirmed by the analysis of findings of cross-tabulation. It indicated that there was no significant difference between the distribution of total expenditure by those in Mallorca and those in Turkey (see Tables D70 to D76). The proportion of low spenders in Turkey on food and beverage consumption was higher than in Mallorca. The proportion of heavy spenders in Mallorca for the same category was slightly higher than in Turkey ($p < .01$). The proportion of heavy spenders in Turkey buying souvenirs and gifts was higher than in Mallorca even though there was no major difference between low spenders ($p < .01$).

The proportion of spenders for all categories of visiting tourist attractions in Mallorca was higher than those in Turkey ($p < .001$). Surprisingly, about 70% of those who visited Turkey mentioned that they had not spent anything on visiting attractions while this was 53% in Mallorca. This ratio reveals that the sample population was less likely to visit tourist attractions. This could be because they were on a summer holiday. The proportion of heavy and moderate spenders in Turkey who bought clothes was much higher than those in Mallorca ($p < .001$). This is also significant for the tourism industry in Turkey as a certain number of tourists come to the country to buy clothes and souvenirs either for themselves or as a present, particularly leather and jewellery.

The local transportation services attracted a high proportion of little (low) spenders for both Mallorca and Turkey ($p < .001$), but this was more significant in Turkey. The majority of respondents both in Mallorca and Turkey were considered as

low and moderate spenders on day trips and rent-a-car services (nearly 80% in between 1 and 299 DM) and the rest of the others as heavy spenders (300 DM and more). The proportion of heavy spenders in Mallorca was slightly higher than those in Turkey ($p>.05$). Even though the findings were not statistically significant, it is important to analyse these findings to explore how likely the respondents were to be active and interested in seeing other places.

7.8.3. Comparison between Two Nationalities

In order to make a comparison between the expenditure patterns of the British and German sample population, the value of German currency was converted into British Sterling (£1= 2.854 DM; as of 2.9.1998). Expenses for food and drink, souvenirs and gifts, visiting attractions, local transportation services were the sub-categories where British tourists spent more than German tourists both in Mallorca and Turkey. The expense of day trips and rent-a-car was the only sub-category where the latter spent more than the former. There was no significant difference for the amount of money spent on buying clothes. The level of overall expenditure was higher for British tourists (see Table 7.9). The reason why British tourists spent more on food and drink than German tourists could be that German tourists mostly prefer half-board accommodation while the British sample chose bed and breakfast and self-catering. Moreover, the all-inclusive type of accommodation was the second choice of German tourists in Turkey (23.1%). One can speculate that the second reason is the larger size of the British tourists' holiday parties.

Table 7.9. Comparison of Expenditure Patterns of British and German Tourists

Sub-Categories	Mallorca (£)			Turkey (£)		
	British	German	Average	British	German	Average
Food and drink	343.2	216.5	279.8	258.7	141.7	200.2
Souvenirs and gifts	92.8	47.6	70.2	91.4	82.0	86.7
Visiting attractions	41.0	33.2	37.1	34.4	17.4	25.9
Clothes	19.1	18.9	19.0	58.2	53.0	55.6
Local transportation	17.3	11.5	14.4	20.4	17.2	18.8
Day trips and rent-a-car	39.7	61.6	50.6	41.1	54.2	47.7
Total	617.2	472.6	544.9	602.8	477.2	540.0

Note: Categories do not add up to the total because of missing observations and exclusion of other expenses.

In terms of a general comparison between Mallorca and Turkey, the former destination yielded higher receipts on food and beverage consumption and visiting tourist attractions per questionnaire survey. Souvenirs and gifts and clothes were other sub-categories on which tourists in Turkey spent more. There were no major differences between the two destinations for local transport, day trips and rent-a-car expenditure. No significant difference was observed between the amount of total tourist spending in Mallorca and Turkey.

7.8.4. Determinants of Tourist Expenditure

Multiple regression analysis was utilised to assess the relationship between one dependent and several independent variables. The level of overall tourist spending was considered as the dependent variable. The independent variables were the level of prices paid for package tours, the number of people in the party, length of holiday, type of holiday, age, level of household income, type of accommodation used and past visits. It was the purpose of this analysis to investigate the extent to which the dependent variable was influenced by changes in each independent variable. The analysis is accomplished through the use of dummy variables concerning socio-demographic and holiday taking behaviour of tourists, as suggested in the literature (Perez and Sampol 2000).

The results of multiple regression analysis indicated that booking time, the level of income, the length of holiday, the number of people in the party, the age level and cost of package tour were the significant predictors for influencing the total amount of expenditure in Turkey (see Table D77). Those who booked their holidays in advance of the minimum of seven months spent more than others. Those with an income level of £30000 to £44999 spent more than others in the same category. People who stayed a week spent less in total figures than those who stayed longer, but the former spent more than the latter on a daily basis. People travelling alone spent 44% and those with another companion spent 23% less than what others spent. Thus, larger groups spent much more than other groups with no

or fewer companions. Those in the category of 45 to 54 years old were likely to spend more. Those who paid £600 or more per person for the package tour spent less than those who paid less. There was no relationship between changes in repeat visits, the type of holiday and accommodation, and changes in the level of total tourist expenditure ($p > .05$).

Except for repeat visits, age, income, booking time, the type of accommodation used and cost of package tour, the remaining independent variables were found to be statistically significant for explaining the relationship to the British tourists' total expenditure in Mallorca (see Table D77). In terms of the number of people in the party, the higher the number, the higher the amount they spent, but those who travelled alone spent more per person. The length of the holiday was also one of the strongest predictors of the total tourist expenditure in Mallorca ($p < .001$), but those who stayed for two weeks spent less per day than those who stayed for a week. Individuals who used all-inclusive options spent less than those who bought self-catering or bed and breakfast accommodation. In a similar way, those who stayed in hotels spent less than those who stayed in apartments.

The results indicated that repeat visits, the number of people in the party, the length of holiday and the cost of the package tour were the most significant predictors for influencing the total amount spent by German tourists visiting Turkey (see Table D78). Thus, larger groups spent 17% more than did others ($p < .001$), but relatively less per person. Individuals who stayed for longer periods (two weeks) spent 22% more than those stayed for shorter, e.g. one week ($p < .001$). There is not much difference in tourist expenses per day between those staying for two weeks and those staying for one week. Repeat tourists spent 11% more than first-time tourists. Those who paid between 700 DM and 1299 DM for the package tour spent 15% less than other groups. Changes in income level, the type of holiday and accommodation, booking time and age did not affect changes in the total tourist expenditure in Turkey ($p > .05$).

Excluding repeat visits, age and the type of accommodation, all other independent variables were found to be statistically significant for explaining the relationship with the amount of German tourist expenditure in Mallorca (see Table D78). Individuals with lower incomes (0-29999DM) spent 16% less than those with higher incomes ($p < .001$). Similarly, those who paid more for the package tour (over 1900 DM) spent 13% more at their destination than those who paid less (less than 1900 DM) ($p < .001$). Those with more companions (4-6 people in total) spent 15% more than those with only one or two ($p < .001$). Those who stayed shorter (a week) spent 21% less than those who stayed a longer time ($p < .001$), but there is a very small difference between the daily amount spent by those staying one week or two weeks. The level of spending by those who booked their holidays much earlier (over seven months in advance) was 11% higher than that of those who booked later ($p < .05$). Those who bought all-inclusive or half-board holidays spent about 25% less than others, e.g. self-catering customers.

In an attempt to investigate if there was any relationship between tourists' overall satisfaction with their holidays and the level of their expenditure, correlation coefficient values were calculated. Findings suggest that there was a positive relationship between the two variables for both British and German tourists in Turkey ($\beta = .119$, $p < .05$; $\beta = .448$, $p < .05$ respectively). This means that satisfaction is a significant factor on tourists' intention of spending while on holiday in Turkey. The more they are satisfied the more they tend to spend. No similar relationship was confirmed for those in Mallorca ($p > .05$).

To sum up, some of the findings on the relationship between tourist spending and effective factors reported here, were largely consistent with those of other surveys which looked only at British tourists visiting the same sample destinations. For example, using a similar way of analysis, Perez and Sampol (2000) demonstrated that those who booked their reservations late, younger tourists, first-time tourists spend less than their reference groups. Those with full board holidays also spend less. Fish and Waggle (1996) found that income is a predictor of tourist spending and

the number of trips taken. According to their findings, families with higher income levels appeared to spend more and take more trips than those with lower income levels. This argument shows that both the amount of and the determinants of overall tourist expenditure at destinations can be similar, provided that individuals take package tours to geographically different destinations which provide similar products for their summer vacations. However, the distribution of total expenditure for each sub-category could differ depending on the purpose of visits and their experiences at their destination.

7.9. External Performance Analysis of Mallorca and Turkey

Questionnaire 3 was designed to measure the overall performance of Turkey and Mallorca in comparison with their counterparts which were self-selected by respondents. As it was an open-ended questionnaire, each reply was numbered and summarised into a list of keywords and phrases which encapsulated the customers' experiences of the services and facilities. Three sets of cards were created, one for the replies relating to experience of better services (satisfiers), one for the replies of worse services (dissatisfiers) and one for the replies of the items which made the holiday satisfactory and choosing which destination to revisit (see Tables D79 to D84). Respondents were more likely to choose a destination in the Mediterranean to compare with their holiday experiences either in Mallorca or Turkey. This has helped to make a successful and reliable comparison among similar destinations.

The first seven highly-ranked attributes found by British tourists visiting Turkey to be better than those of other destinations visited since the beginning of 1995 were hospitality -positive attitudes of local people and staff towards tourists- (52%), level of prices (34%), weather (17%), plenty to do and see (15%), overall cleanliness of the resorts (13%), scenery (11%) and quality and variety of food (11%) respectively (see Table D79). As far as a similar comparison is concerned for Mallorca, overall cleanliness of the resorts (19%), level of prices (18%), hospitality (18%), cleanliness and quality of beaches and the sea (16%), weather (12%),

plenty to do and see (12%), the availability and suitability of entertainment and nightlife (10%) were respectively among the most significant attributes of Mallorca (see Table D81). When the findings about Turkey and Mallorca are compared, the overall cleanliness, level of prices, hospitality, weather, and plenty to do and see were the items found to be similar in favour of Turkey and Mallorca in comparison with other destinations. Although hospitality and level of prices were joint attributes of both destinations, their rankings for the list of Turkey had higher percentage values than for Mallorca. Therefore, in addition to these two attributes, scenery, and quality and variety of food were those in favour of Turkey while quality and cleanliness of beaches and the sea, and suitability of entertainment and nightlife were in favour of Mallorca.

Among those found to be worse in Turkey than other self-selected destinations were harassment -the perceived negative attitudes of local shopkeepers in the resort to sell goods and services- (34%), poor conditions of roads and driving -traffic- (11%), overall dirtiness of the resorts (8%), poor quality and dirtiness of beaches and the sea (7%) and the lack of air-conditioning systems (5%) (see Table D80). The highly ranked negative attributes of Mallorca were overcommercialisation (18%), overcrowding (12%), noise (10%), level of prices (8%), dirtiness (7%), lack of entertainment and nightlife (6%), poor quality and variety of food (6%) (see Table D82). As can be seen, except for overcommercialisation, negative comments were related to the same attributes stated by those in Mallorca and Turkey, but in different rankings. This may be a result of movements in the tourism industry to commercialise the industry. The main problem in Turkey was that respondents felt disturbed to be pressured by local shopkeepers to buy something from their shops. The other elements of the list were mainly based on tangible things (e.g. poor traffic, dirtiness and lack of air-conditioning). The complaints presented by those in Mallorca were mostly related to the results of overdevelopment of the tourism industry. As Mallorca attracts a large number of domestic and foreign tourists, a noisy, dirty and overcommercialised atmosphere has become apparent. These can also be good benchmarks for Turkey to control overdevelopment in

the tourism industry in the near future. Some problems in Turkey did not appear in Mallorca (e.g. harassment, poor roads and driving, beaches and air-conditioning) because Mallorca has improved its tourism infrastructure and services to reach standards set in Europe.

Although respondents had a higher tendency to choose mostly either Mallorca or Turkey rather than other destinations they visited as a best destination in terms of their holiday experiences, the findings could be significant in understanding which factors (attributes) were effective in their decision-making process; and why Mallorca or Turkey was selected as the best. Hospitality (39%), plenty to do and see (14%), weather (10%), level of prices (9%), overall cleanliness (8%) and value for money (7%) were attributes respondents liked most and considered to be important while choosing Turkey as the best compared with any other destination (see Table D83).

Moreover, hospitality (16%), plenty to do and see (15%), quality of beaches and sea (12%), level of prices (11%), being family-oriented (11%), overall cleanliness (10%) and suitability of accommodation facilities (10%) were the similar attributes of Mallorca (see Table D84). Except for hospitality and plenty to do and see, the other attributes among the first six listed differed from Turkey to Mallorca. There is ground to argue that hospitality of local people and plenty to do and see while on vacation are more important attributes than ever when evaluating tourists' overall experiences in respect to their holidays at sample destinations.

In summary, hospitality, plenty to do and see, level of prices, weather conditions and value for money were perceived to be among the most effective attributes in the competitive position of Turkey. It is interesting to note that both hospitality and harassment were ranked as the first positive and negative attributes respectively. Despite the difficulty of assessing it, this finding might be regarded as an indicator of rapid development in tourism in the country. Those attributes positively affecting the competitiveness of Mallorca were hospitality, plenty to do and

see, quality of beaches and the sea, being family-oriented and suitability of accommodation facilities. Though Mallorca was perceived to be cleaner, it was found to be dirtier than some other destinations. Therefore, it is not clear whether this attribute will be taken into consideration as a positive or negative element of the tourism industry in Mallorca. All the attributes examined here will be re-evaluated in detail in the following chapter, based upon the analysis of qualitative data.

7.10. Competitor Analysis

In questionnaire 3, a competitiveness set has been produced by collecting data on the respondents' previous visits to other destinations in the last four years (Table D85). The objective was to ascertain if both sample destinations were in the same competitiveness set on the basis of other multiple destinations recently visited by respondents. According to this set, except for the US, the first ten destinations were in the Mediterranean basin even though slight differences appeared on the ranking list. These destinations are the Canary Islands, Greece, France, Spain, Ibiza, Portugal, Cyprus, Italy, Turkey (or Mallorca) and Malta. The share of these destinations for those who visited Mallorca was higher than for those who visited Turkey. The US was ranked as the most visited second destination by British respondents who have been to Mallorca (25.2%) whereas it was ranked as the fourth by those who have been to Turkey (18.0%). The share of other destinations such as long-haul (e.g. the Far East and Africa) and short-haul (e.g. other European countries) out of the total destination population visited by the sample remained much smaller.

As a consequence, one could suggest that the sample population selected in this study had a much higher loyalty to Mediterranean basin destinations and the US (particularly Florida) for the purpose of taking a mainly 'sea-sand-sun' vacation. Such an attempt at competitiveness analysis could be significant for destination benchmarking research in order to have a better understanding of competitors in the same set in a particular market and make a decision about whom and what to

benchmark. For instance, as far as the competitiveness set discussed in this study is concerned, both Mallorca and Turkey would have an opportunity to select their benchmarking partner(s) from those in the Mediterranean basin.

7.11. Summary

Briefly summarising the results of the above analysis, it appears that applying internal and external benchmarking approaches and performing several statistical tests and carrying out three different types of questionnaires, differences (gaps) have been recorded between two destinations on several tourist satisfaction attributes, motivation items, socio-demographic profiles and holiday-taking behaviour, and level of tourist expenditure on various sub-categories. The findings have also provided grounds for identifying the areas where Mallorca and Turkey have strengths (core competencies) and weaknesses not only against each other but also some other competitor destinations. Moreover, cross-cultural differences have been recorded in respect of the two sample populations' motivations, expenditure levels and satisfaction or performance perceptions of Mallorca and Turkey as summer holiday destinations. Both theoretical and practical implications for carrying out destination benchmarking research along the line of the primary research findings are presented in Chapter 10. The next chapter will present the analysis of qualitative data to illustrate the root causes of differences between the two destinations by using direct quotations from open-ended questions and reflections from the researcher's first-hand observations based upon several categories of destination attributes.

Chapter Eight

Analysis of Data II

8.0. Introduction

The structure of this chapter is based on the assessment of the open-ended questions and personal observations to monitor how each destination was progressing on the basis of the nine major categories. These categories extracted from factor analysis in earlier chapters are hospitality and customer care, level of prices, local transport services, facilities and services at the resort airport, level of language communication, overall facilities and activities, accommodation services, hygiene, sanitation and cleanliness, and overdevelopment and commercialisation. Although the concept of overdevelopment and commercialisation is not one which is directly extracted from factor analysis, it is believed that this attribute also needs to be examined as it plays a significant part in the performance evaluation of coastal destinations. Some photographs taken during the participant observation have been taken into consideration where needed (see Appendix E). Implications for destination benchmarking are presented in Chapter 10.

8.1. Hospitality and Customer Care

According to the results of questionnaire surveys presented in earlier chapters, hospitality and customer care were the most significant attributes contributing to the level of tourist satisfaction in Turkey. As a part of the term of 'interactive quality' described as an outcome resulting from interaction between the customer and personnel or other people (Lehtinen and Lehtinen 1991), this attribute was also one of the most critical elements of those destinations in Turkey which gave one of the largest positive gaps in comparison with that in Mallorca. This means that both

British and German tourists were mostly satisfied with the helpfulness and friendliness of local people and staff in Turkey. This could be because the tradition in the country views travelling at home or abroad as a sign of prestige and sees the function of host to tourists as one commanding respect, regardless of tourists' culture or nationality. Since the Turkish culture is sensitive to nature and beauty, service providers are highly recommended to wear elegant work uniforms, to be stylish and to keep every place in the business as clean and tidy as possible. There is also a motto established by the Ministry of Tourism which is highlighted every April during 'tourism week': "Tourists want hospitality and friendliness".

Despite the strength of Turkey's tradition of hospitality, a major complaint from tourists has always been harassment by shopkeepers and restaurateurs. This finding corresponds with the proposition of the dual-factor theory in customer satisfaction measurement. This theory suggests that a person may be both very satisfied and very dissatisfied with a product or a service (Yi 1990). The difference between cultures in western and eastern countries is emphasised in this case. While local shopkeepers see inviting tourists into their shops to buy something as a way to encourage business, tourist from the West perceive this as being harassed, because in their culture the customer is expected to make the first move. The absence of this type of complaint in Mallorca may signal that cultural differences between these communities (between German and Mallorcan and between British and Mallorcan) would be minimal.

Similarly, Turkey used to be a male-oriented country and even today relations between men and women are not quite the same as those in the West. The expansion of the tourist industry gives Turkish men an opportunity to learn to feel at ease with foreign women despite the fact that few of the former speak any foreign language fluently and are not quite sure how to treat foreign women. However, things are improving. To the credit of Turkey, one respondent said that attitude towards tourists had changed for the better since her last visit by stating that "it is good to

see women out. This means that European women (like myself) get hassled a bit less by men. It did seem dangerous to travel in Turkey in 1971".

Alternatively, another causes of the problem of harassment may be that Mallorca and Turkey are at different stages of developing their tourist industries. Turkey is perhaps still at the stage where 'informal' sectors, though declining, are still evident. For example, there are still businesses run from temporary, makeshift premises - often selling food, drinks, clothing and gifts, who pester tourists for custom. This can even happen on the beaches (Photograph 1). Kermath and Thomas (1992) suggest that 'informal' sectors enter tourism before 'formal' sectors and the prevalence of one over the other is an indicator of the stage of tourist development. Informal sectors are expected to start declining as the volume of formal sectors increases. In contrast, tourism in Mallorca is so well-established that the 'formal' sector has almost entirely taken over from the 'informal'.

In the analysis of open-ended questions, it was observed that tourists tend to offer suggestions on how to solve the problem of harassment in Turkey. One respondent emphasised that "... We would have bought much more if allowed to browse and not to be pestered continually!". Similarly, another said that "... If they hassled a little less they would probably sell more". This finding may refer to the results of the tourist expenditure survey in which those in Mallorca spent more on food and beverages than those in Turkey. This provides a potential practical implication to be investigated further. Interestingly, the researcher's observations (in Marmaris in the summer of 1999) indicated that some restaurants added a note at the top of their menus or billboards stating that, as part of their efforts to improve their image and marketing strategies, there is **no harassment** in their restaurants (Photograph 2). Although this evidence indicates that some restaurateurs have eventually become aware of tourist complaints about the negative attitude of local shopkeepers, the promotion of the terms of harassment or no-harassment could not be an effective marketing strategy; further it may bring other side-effects. A comment about

this problem given by a customer may be significant: "It would be better if they just let you decide if you wanted to go to their shops".

8.2. Level of Prices

The analysis of questionnaire findings in earlier chapters revealed a significant gap between tourist perceptions of the price levels in Mallorca and Turkey. The latter was found to be more satisfactory and much cheaper than the former. Turkey is perceived as a cheap sun and sea destination and has become increasingly popular in the last 15 years amongst tourists who travel to enjoy good weather, sea and beaches. As a result of the researcher's personal observations, the level of prices in Mallorca seems to be higher, particularly for food and drink, gifts, visiting attractions and day trips, although it varies between resorts and between service providers.

The primary findings of this study indicate that British tourists visiting Mallorca paid more than those in Turkey to book their package tours. This could be a further indicator that Turkey is cheaper than Mallorca in the British market. Though a steady increase has been recorded in the retail price-index in Turkey, the number of inclusive holidays to Turkey tends to be increasing gradually as the Turkish Lira (TL) is losing its value against British Sterling and the German Mark. As Table 8.1 shows, the TL has lost its value against Sterling by 115% and against DM by 106% over the last two years. This ratio is only 28% in the examination of a similar relationship between Peseta and Sterling over the same period, indicating that Peseta is also very strong against the TL. This could be a significant factor for choosing Turkey as a holiday destination. The share of value added tax (VAT) for tourism and related products in Turkey (15%) is almost double that of Mallorca (7%). Despite this, it appears that Turkey is still cheaper because of the higher level of VAT in Turkey is offset by the weakness of the TL against foreign currencies. One repeat tourist explains the potential reason for choosing Turkey in the future as "the strong British Pound makes it a good value holiday".

Table 8.1. Changes in Exchange Rates (1998-2000)

	British Sterling (£)		German Mark (DM)	
	Value	Change (1998-2000)	Value	Change (1998-2000)
1 Turkish Lira				
July 1998	0.000000226	---	0.0000068	---
July 2000	0.000000105	115%	0.0000033	106%
1 Spanish Peseta				
July 1998	0.00465	---	---	---
July 2000	0.00363	28%	0.01175	---

Source: Daily newspapers in July 1998 and 2000.

The high level of prices was found to be one of the major concerns in this study which need to be improved in Mallorca. This finding also corresponds with other relevant research studies continuously carried out by the Department of Tourism in Mallorca (Govern Balear 1997). This item has been on the top of the list of 'complaints and things to be improved' in Mallorca. As far as tourist perceptions of higher prices in Mallorca are concerned, the level of prices tends to increase due to their entry into the European Community and the Spanish Peseta is stronger in terms of the international exchange rate. As a result, the findings of past research revealed that the amount of spending per person (or group) is decreasing although the number of people visiting shops tends to increase (Bruce and Serra 1996).

8.3. Local Transport Services

The availability of transport services in Turkey was found to be much better than that of Mallorca. As the authorities confirmed, transport is a serious problem in Mallorca. Being a small island and having the highest density of cars in mainland Spain and its islands, traffic becomes heavier from one day to the next. There is only one type of public transport service in Mallorca run by local councils, based on a strict timetable. A number of tourists returning to Mallorca commented favourably on the continuing improvement in both roads and public transport services. In Turkey, transport services are more flexible and are mostly carried out by private vehicles called 'dolmus'. Offering a frequent service, without the restrictions of timetable, their routes take them past almost all the hotels and other holiday accommodation. In terms of ticketing practices in public transport services, like in

the UK, each passenger is provided a printed-ticket while boarding on the vehicle in Mallorca. In contrast, passengers in Turkey are able to pay in cash while on the vehicle through their final destination in the resort, but are not provided any ticket. There could be several reasons for this practice. First, it could be a sign in that use of technology is not at the desired level or the benefits of its use are not absorbed yet. Second, this could be a result of an unorganised administration.

8.4. Facilities and Services at the Resort Airport

The findings of both questionnaire surveys 1 and 2 confirmed that those visiting Mallorca were more likely to be satisfied with the availability of facilities and services at the resort airport than those in Turkey. Observations appear to give strong support to the validity of this finding. Palma has had a brand new airport since summer 1997, which is much better than the old one. Dalaman airport in Turkey was opened for military purposes in 1976 and became an international airport in 1988. Dalaman airport serves approximately 4 million passengers whereas 15 million per year pass through Palma airport. Mallorca provides a larger airport with 150 check-in desks, 7 X-ray check points and 52 departure gates. In comparison, Dalaman has 10 check-in desks, 2 X-ray check points and 6 departure gates.

There is sometimes a long queue at the airport in Turkey since it is obligatory to have passports checked and get them stamped by the police. One customer complained that "... Dalaman airport on arrival... Passport control is far too slow..." while another came up with a solution by highlighting that "... Longer queues at the airport... Takes a long time passing through... We should be able to pay our visa to a travel agent in the UK instead of having to queue here...". In Mallorca, even though British but not German citizens are obliged to show the police officers their passports, it takes only a few seconds. That is why check-in and check-out services in Mallorca take a much shorter time than those in Turkey. Check-in and boarding services in Mallorca are more organised. Passengers are taken to the gate 45 minutes before departure. But this sometimes varies due to flight delays. In ter-

minals C and D, each gate is separate (Photograph 3). In Dalaman, passengers may be called any time between 15 minutes and 1 hour before departure.

Another main feature of Palma airport is to provide many more facilities. There are many restaurants and cafes to eat and drink in and many places to have a rest before departure, as one customer agreed: "I think that the airport has greatly improved; there seems to be more space for passengers, more shops and a better customer service for passengers..." (Photograph 4). The airport in Turkey is so much smaller that there are only two cafes and couple of hundreds of seats (Photograph 5). Palma airport has a better air-conditioning and lighting system, more toilets (almost one for each gate) and more public telephone kiosks throughout the airport. It has a better transport service with small vehicles available within the building for wheelchair and elderly passengers. It also has separate service desks at both departure and arrival lounges for each flight company and tour operator. Except on Fridays, Saturdays and Mondays, there seem to be enough trolleys at Palma airport, but at Dalaman the airport building is so small that there are no trolleys for departing passengers.

Observations further revealed that Palma airport was much cleaner than its counterpart in Turkey. Each dining room at the departure gates in Mallorca is cleaned immediately all the passengers have boarded. Palma airport has many litter bins, one for each gate and others located in corridors while Dalaman airport lacks litter bins due to security concerns.

The length of transfer time between the resort airport and the resort is critical for the marketing of a destination (Goodall 1990). Distance between the airport and the furthest resort in Mallorca is very short, about forty minutes by bus. However, in Turkey transfer times ranging from one to three hours can make passengers feel stressed and tired during the hot Turkish summer. Therefore, a new airport, based in Bodrum/Milas which is an important resort on the Aegean coastline, has been opened. It is expected to lower the tourist traffic of Dalaman airport and give easy

access to some other resorts. As a brand new airport, Bodrum/Milas airport is cleaner, bigger, more relaxed and better organised than Dalaman airport. What benchmarking can offer is that Dalaman airport needs to be physically modernised to deliver a better service. Check-in and check-out services need to be reassessed to keep the waiting time to a minimum.

Finally, other unfavourable observations about the airport in Mallorca are as follows. As the airport is so large, some tourists may feel confused or tired. A quotation from one tourist demonstrates the importance of this problem: "...The new airport is much too large.. Have heard some visitors will now find an alternative holiday destination because of the long walks within the airport complex...". Permission for smoking at the airport seems to be the next problem. Flight delays in Mallorca ranging between 1 and 12 hours sometimes upset passengers. This is a very common situation particularly between Thursdays and Mondays. Passengers have to wait for boarding without being given any further information. As a consequence, in order to better serve air passengers visiting Palma airport, a collaboration project between tour operators and airport management has been released. TUI and Neckerman und Reisen (NUR) are involved in this pilot project which is looking for ways to minimise the disadvantages of heavy traffic in the summer season and to promote staggered arrivals and departures.

8.5. Level of Language Communication

The level of language communication in Mallorca was perceived to be better than in Turkey. This is perhaps because resorts in Mallorca are largely dominated by British and Germans, either as residents, tourists or shopkeepers. As a result, tourists may not need to communicate with the local people. There are a range of brochures, maps and catalogues prepared in different languages such as English, German, French and Spanish in Mallorca. This also applies to menus in restaurants and bars. It is interesting to see that in Mallorca an example of the food (dish) is pictured on the menu with its price (Photograph 6). In Turkey the menu is written in

English along the Aegean coast and in German along the Mediterranean coast (Photograph 7). The main similarity between Mallorca and Turkey is that the restaurants in both have a larger-than life sized or magnified menu outside which gives names and prices of available dishes. This could be helpful for both the customer and the staff to ease communication and to give an advance idea of what to expect. A further reason may be that Mallorca welcomes German and British entrepreneurs running businesses such as pubs, restaurants or souvenir shops, or as employees in the tourist industry. There are some legal restriction in Turkey on non-nationals owning businesses or working in the industry.

At Palma airport, announcements are made first in Spanish (or Catalan) and then in other relevant languages, e.g. German, English, Italian and Romanian. In Dalaman, the first language is English along with other relevant languages such as German, French or Romanian. Palma airport also has a better signposting system than Dalaman. Most signs are in Spanish, but German and English language ones are rare. Perhaps that is one reason why on arrival passengers are not sure how to reach the baggage claim area. Passengers are not informed about any delay. Although the Spanish word 'retrasado' is written on the board, passengers do not know that this means 'delayed'. There is room for improvement here. Police officers at the airport (passport control) do not speak any foreign language well, which is also a common problem at the airport in Turkey. This is more important in Turkey because police officers have to speak directly to foreign passengers due to passport endorsement and visa requirements.

Mallorca has a better traffic signing, signposting to tourist attractions and a more efficient delivery of written information to its customers. It is possible to obtain leaflets about every attraction from either tourism information centres and local agents or from accommodation receptions. In Turkey, both traffic signing and signposting to tourist attractions need to be improved to increase road safety and aid tourists to have an easy access. Leaflets in multiple languages conveying information about resorts need to be published.

8.6. Availability of Facilities and Activities

The general availability of facilities and activities in Turkey was found by both sample groups to be slightly better than that in Mallorca. This was confirmed in both questionnaires. This is not an unexpected result because, as a new destination, Turkey offers its customers various opportunities during their holiday. There are daily or 2-3 day tours to other main cultural and historical attractions as well as daily boat tours (Photograph 8). Resorts in Turkey are also richer in watersports and shopping facilities. Although no difference in health services was observed by customers, it is difficult for the researcher to make any judgement due to limited first-hand information. Considering the assessment of the context of open-ended questions and interviews, there could be more rationale for supporting the reliability of these findings. "I enjoyed Marmaris (Turkey) the best because there is a lot more nightlife and things to do during the day. It is also a bigger town; so there is lots more to see...". Although the availability of facilities and services is in Turkey's favour, there is one significant complaint to improve their air-conditioning services including the accommodation facilities as it is very hot in summer time.

There was only one variable which was found to be better in Mallorca in this category, which is the availability of facilities and activities for children. This might be one of the most significant reasons for British and German tourists with children choosing Mallorca. As one customer points out, 'Mallorca is a children-friendly destination' which could mean that it has more for children. As observations indicated, Mallorca provides a number of facilities and activities particularly for family groups, such as sports, watersports, private swimming pools, nursery services and playgrounds. Some restaurants in the area attempt to attract this customer group by offering a special, half-price menu for children under twelve and providing a private playground. They also serve a special menu for those who are under 12 years old, at half price. In Turkey, such services are still in their infancy and are provided only by some large establishments like holiday villages and five-star hotels. In Mallorca, it is possible for parents to rent pushchairs or car seats. Such

services are not well-developed in Turkey. Most importantly, the infrastructure in many Turkish resorts (e.g. Marmaris) does not comply with standards in order for parents to be able to carry their pushchairs on the pedestrian roads.

8.7. Accommodation Services

As the majority of the accommodation stock was built after the mid-1980s and from the early 1990s, Turkey has many new hotels with richer facilities. Customer care in hotels is also the priority. In Mallorca, as a more mature destination, the accommodation stock is too old and unable to meet current requirements. The improvement of the product stage therefore primarily focuses on the modernisation of existing accommodation and introducing higher standards for the construction of new ones. It is considering the regeneration of accommodation infrastructure which was built before 1984 and needs further technical improvement to bring them up to current standards. The inspection process covers details about safety matters, fire prevention, quality of services, furnishings and food safety regulations. Some old buildings are replaced by new green zones. Tourism facilities must also conform with standards for saving water and energy and treating the environment responsibly. In this context, the construction of new buildings must conform to a minimum standard of four-stars with a maximum height of three storeys. Photograph 9 shows how high some existing hotels are and how close to each other and to the seashore. Foreign tour operators such as Thomsons collaborated with the project by investing considerable financial resources to upgrade the physical and service quality standards of hotels and apartments in Mallorca. Specific guidelines covered food, facilities, entertainment, room decor and staff service.

8.8. Hygiene, Cleanliness and Sanitation

The researcher's observations in Santa Ponsa and Alcudia showed that Mallorca has a better and more efficient system for delivering a cleaner environment. There

are many litter bins close to both sides of pedestrian walk ways. For example in Alcudia, there are small and large litter bins on beaches about every 20-25 metres (Photograph 10). There are toilets for both men and women and buffets (cafeterias) every 100 metres on the beach. The sand is clean as it is cleaned regularly, but the seashore and sea seemed to be dirty. Perhaps that is why one tourist observed that "... Streets seem dirtier and lots of cigarette ends on beaches...". Keeping streets and beaches clean seems to be harder in Turkey because all litter bins were removed due to security concerns or in some places replaced by small ones (Photograph 11). There does not seem to be a major problem with the cleanliness of the sea yet as Turkey is a very new destination in international tourism; but action should be taken to make it better if any lesson needs to be learnt from Mallorca in this respect.

Mallorca has a well-designed blue flag signposting system at regular distances, informing users about the availability of facilities and activities on beaches and about any restrictions, e.g. Alcudia and Santa Ponsa beaches (Photograph 12). There are six signposts in Alcudia. Many beaches in Turkey hold blue flags which are not effectively used in practice. It is hardly possible to see a blue flag signpost located in different parts of beaches although they have been awarded, e.g. Icmeler (Marmaris). Alternatively, one can see hand-written signposts on beaches (Photograph 13). It is interesting to see that customers still complain about the dirty environment in Mallorca although it delivers an acceptable level of services for providing a clean environment. Perhaps this prompts the discovery of the root causes of customer complaints and why the system does not work adequately.

8.9. Overdevelopment and Commercialisation

Such evidence as over-commercialisation, overcrowding, noise and dirty environment can be regarded as prime indicators of rapid developments in tourism in Mallorca, a mature destination in international tourism. As a consequence of the emergence of mass tourism, it has attracted a high volume of tourists, but with a

low level of tourism income and spending. To meet the increasing demand, accommodation capacity was extended and widened to other unspoilt areas causing environmental deterioration. This also led to overcrowded beaches by the mid-1980s. Since Mallorca has reached the mature stage of its destination life-cycle, the local authority has decided to revitalise the image of Mallorca by establishing a long-term planning policy.

Most of the tourist complaints of overdevelopment in Mallorca are related to losing its original culture, nature and food. As Dogan (1989) highlights, the more tourism development there is, the more local people may want to make more profits and moral (or cultural and natural) values are replaced by values based on money. One first-time tourist has drawn attention to the extent of this problem by underlining that "It is very commercial... Losing its culture and heritage.. Like visiting a British resort in the sun...". The next case addressed by another tourist has links to support this statement:"... Too much fast and easy food is available... Nothing fancy or different is available...". One could speculate that the local cuisine has a limited number of dishes and it is therefore easy to find traditional British food in Mallorca, e.g. fish and chips (Photograph 14) or British style pubs (Photograph 6). There are some customers who observed the results of the implementation of the recent tourism development plans: "... It has become more commercialised and is starting to detract from the island's original attraction. Happily, all new building appears to be of low height, reducing its detrimental effect...". Despite being perceived to be largely a family holiday destination, Mallorca attracts a mixture of both young and middle-aged tourists in the summer season while older tourists prefer to go between October and May. This has raised a number of potential problems particularly for those who travel as a family. Such resorts as Magaluf and Arenal have become more popular with younger people who tend to continue drinking and staying up late which keeps up other holidaymakers.

Though resorts in Turkey are much younger and not so over-commercialised as those in Mallorca, there is already some evidence of a potential threat (dirt,

crowds, noise and loss of culture and nature) in the future unless tourism development in Turkey is controlled. Findings address the importance of paying attention to improving tourist destinations in Turkey before it reaches the maximum development stage. Feedback obtained from some repeat tourists is significant in identifying factors which lead to a destination moving on to the next stage in the destination life-cycle. Among these are a busy atmosphere and the lack of original culture and nature. One pointed out that it is "... Getting too overcommercialised, spoiling natural beauty as too many hotels are being built...". The next one observed that "Turkish resorts are becoming too commercial and losing their cultural charm...". The third observation is very similar to one made about Mallorca and signals the degree of potential threats for the tourism industry in Turkey in the future: "It is busier with more tourists... It has become too English, e.g. prices in English, restaurants named after English programmes...". If external benchmarking is believed to be worthy of consideration, this is what Turkey has to choose as a benchmark and learn lessons from Mallorca.

8.10. Summary

This chapter has attempted to (1) partially illustrate the root causes of differences between two destinations, and (2) monitor whether there are examples of good practice for use in destination benchmarking. The analysis of data has been carried out using direct quotations from open-ended questions and reflections from the researcher's personal observations along with a series of photographs taken by the researcher. All these findings suggest that Turkey outperforms Mallorca on hospitality, level of prices, local transport services, accommodation services and overall destination facilities and activities. Harassment is a serious problem in Turkey. Mallorca makes a more attractive destination particularly for family groups by providing a variety of facilities and activities. Mallorca has a richer and much better airport in terms of the variety of facilities, cleanliness and efficiency. Although Mallorca is progressing well in delivering a cleaner service, there are still customer complaints about dirtiness. Mallorca has the advantage of better language commu-

nication with its customers. Finally, reaching the saturation point of the destination life-cycle model, Mallorca is a more mature, overdeveloped and commercialised destination. Thus, there could be some lessons that Turkey will learn from experiences of tourism development in Mallorca. The analysis of primary data is now complete. The next chapter is devoted to the analysis of secondary sources of data in Mallorca and Turkey, as a part of the quantitative destination benchmarking measurement method.

Chapter Nine

Analysis of Data III

9.0. Introduction

The collection and analysis of secondary data gathered by tracing such sources as books, research notes, articles, news bulletins and statistics is one of the main steps in benchmarking (Karlof and Ostblom 1993). Of these, as being another leg in measuring destination performance, the analysis of quantitative measures is a useful method for comparing results and observing changes periodically, and setting new targets or revising earlier ones. This chapter therefore presents a statistical interpretation of quantitative measures relating to the sample destinations' performance levels. Variables selected as quantitative measures for both Mallorca and Turkey are the accommodation capacity, the volume of tourist arrivals and tourism receipts. Excluding the accommodation capacity, the other measures are selected from Table 4.3 given in Chapter 4. Provided in Appendix D, data are evaluated from the perspective of both internal and external performance.

9.1. Analysis of Accommodation Capacity

This study suggests that the analysis of the accommodation capacity provides a clear picture of the tourism industry in one destination and its potential for improvement in the future. For instance, the accommodation capacity in Mallorca is mostly dominated by hotels (53%). As it was designed for a particular market, there is a much greater proportion of small and medium-capacity than large-capacity accommodation. The quality of the total accommodation capacity is assessed at three-stars (64%), two-stars (15%), four-stars (15%), one-star (6%) and five-stars (1%). As of 1996, the accommodation capacity on offer was 260,000,

representing 17.5% of the total accommodation capacity of Spain. Nearly one hundred and forty thousand of these were in the form of hotel beds, 97,000 in apartment, 7,500 in holiday villages, 484 in agrotourism and 1,000 in camping beds. Hostels have a 5% share in the total accommodation stock (Table D86). Besides these, there are a substantial number of undeclared beds consisting of lodgings, apartments, villas and second homes, which are difficult to quantify.

In Turkey, two-star and three-star hotels are currently attracting the most investment from entrepreneurs. The rest of the accommodation capacity is formed of holiday villages, motels, boat hotels, thermal hotels, apartments, boarding houses, inns, campsites and golf clubs. Figures also suggest that large scale establishments such as five-star hotels and first and second class holiday villages have a distinctive place in tourism. As of 1997, Turkey had 1,914 accommodation establishments with 312,000 beds licensed by the Ministry of Tourism as opposed to 1,260 establishments and 173,227 beds in 1990 (Table D87). In addition, there are also others certified by local municipalities. When adding those which are not registered and the bed capacity of second homes, it is estimated to exceed one million. The accommodation capacity of the facilities licensed by the Ministry of Tourism is expected, with the completion of facilities which are still under construction, to reach nearly 800,000 beds by the end of 2000. Those which are registered under municipal licences are expected to reach 1.3 million by the same period. In respect to the distribution of the accommodation establishments and beds, the Aegean and Mediterranean coasts and the Marmara region are Turkey's leading tourist destinations. These three regions account for over 80% of the country's total accommodation stock as a result of the Tourism Encouragement Laws and Legislation (Table D88). As of 1997, the total number of overnight stays by foreigners was 3.3 million in the Marmara, 2.5 million in the Aegean and 2.6 million in the Mediterranean region.

In terms of the average occupancy rates of the accommodation establishments, Turkey enjoyed an increase in occupancy levels from 48.1% in 1990 to 54.5% in 1997 (Table D89). The Gulf crisis was the main reason for decline in 1991, but

there was no obvious reason for the decrease in 1994. Since then, it has started rising gradually. This type of analysis was not applicable to Mallorca as there was no data available.

Comparing the accommodation stock to another destination could pinpoint whether two destinations have the same structure of tourism development. For instance, Turkey has over-invested in the infrastructure and superstructure of tourism in the country, but has spent less on marketing them. Therefore, the distribution of large-scale accommodation establishments in both destinations is diverse. Turkey is encouraging the construction of large hotels and holiday complexes whereas Mallorca has given priority to small and medium-sized establishments by demolishing old large hotel buildings. Considering its customer profile, Turkey may need to re-evaluate the structure of its accommodation capacity.

9.2. Analysis of Foreign Tourist Arrivals

This section examines the performance of sample destinations by evaluating not only changes in the number of foreign tourist arrivals compared to the preceding years (internal performance) but also changes in its share out of Mediterranean and international tourism (external performance).

Mallorca is one of the earliest tourist destinations in the Mediterranean basin. In Mallorca, tourism boomed in the 1950s. It recorded remarkable improvements in the 1960s since the Spanish economy was stabilised in 1959 and tourism was encouraged to increase foreign currency earnings. The opening of the airport on the island encouraged the development of tourism activities from abroad. However, as in other major tourist destinations, it experienced brief interruptions at the time of the 1974 and 1979 international crises. Then, it continued to grow again in the 1980s. Although Mallorca was the most exclusive island in Mediterranean tourism, it now has the highest concentration of tourism in the world. Mallorca has trans-

formed its society from a largely agricultural economy into a service-based culture and now dominates the Spanish package-holiday industry, of which it claims 40% of the market.

Compared to the figures of 1985, the number of tourist arrivals to Mallorca had almost doubled by 1997 (Table D90). However, Mallorca has been unable to yield a considerable and stable increase in proportion to Mediterranean tourism in terms of the number of tourist arrivals. It experienced a decrease starting in 1987 and continued up until 1992. From 1993 onwards, it has gradually increased. This statement also applies to the proportion of tourist arrivals in Mallorca in international tourism. As of 1997, Mallorca represented a 1.11% share of international tourism figures.

The number of foreign arrivals in Turkey remained stable at about one million until the beginning of the 1980s (Table D91). Political change stimulated the development of the tourism industry beginning in the mid-1980s. In other words, the rapid growth of the tourism industry in the country has been very much associated with the economic development in the region. Since Turkey adopted an open doors policy in the early 1980s, its economic ties with the rest of the world have been rapidly developed. As a result, international tourist arrivals in Turkey have grown substantially during the last two decades. They have shown the largest increase both in Mediterranean and world tourism market shares. Turkey raised its share in Mediterranean tourism from 1.94% in 1985 to 5.17% in 1997 and its world tourism market share from 0.68% in 1985 to 1.55% in 1997. This figure marks Turkey as the 19th most popular destination in terms of tourist arrivals while it was 52nd in 1980. According to statistics, actual tourist arrivals in Turkey increased almost forty-five-fold between 1963 and 1997 from about 200,000 to 9 million and is expected to reach 17 million in the year 2000, representing a growth rate of 88%. Turkey raised its foreign tourist arrivals by twenty-four-fold between 1965 and 1980, nearly five-fold between 1980 and 1985, and nearly five-fold again between 1985 and 1997.

Comparison between Mallorca and Turkey reveals that both destinations are progressing well by continuously increasing their share in Mediterranean and international tourism in terms of the number of foreign tourist arrivals. Direct comparison between two destinations seems to be difficult due to differences in the size of land, the accommodation stock or other facilities. Based upon figures presented in Table D90 and D91, one could suggest that the calculation of the percentage share of arrivals at the destination out of the actual annual tourism demand in the Mediterranean and in the world is a possible method of measuring the development of the national tourism industry. For example, almost 4.7 million people visited Mallorca in 1988, with a 3.52 percent share in the Mediterranean (or 1.16 percent in international tourism) while 5.5 million people visited in 1995 resulting in a 3.29 percent share (or 0.98 percent in international tourism). In spite of an increase in the number of arrivals, there is a decrease in its proportion of international figures. From these findings, it appears that comparing the number of arrivals to previous years' figures does not always reflect the real performance of the destination.

9.3. Analysis of Distribution of Tourist Arrivals by Nationality

This type of criterion analyses how well a destination performs with each market group and illustrates differences between current and past figures. For example, German and British tourists play a significant role in Mallorca's tourism activity (Table D92). British and German outbound tourism to Mallorca has experienced a boom over the last four decades since it has become a cheaper holiday destination for these markets. From 1970 through to 1997, the UK accounted for more than 28% of all visitors, peaking at 35% in 1985. British tourist arrivals in Mallorca in 1995 totalled 1,650,000, an increase of 31% compared to 1990 and 41% compared to 1985. By contrast, Germany, which contributed about 20% of all visitors during most of the 1970s, increased its proportion to become the dominant nationality in 1991 at 41.3% and in 1997 at 46.7%, accounting for almost half of the total market for international tourism in Mallorca.

There is an apparent decrease in the percentage of those who are from France, Italy, the Benelux countries, Sweden, Finland and Denmark. Such countries as Austria, Norway and Ireland have had an upward trend in taking a greater role in the number of total tourist arrivals to Mallorca. Marketing strategies were widened to attract new potential markets such as The Netherlands, Switzerland and eastern European countries. The first two markets were already familiar with Mallorca but needed encouragement while the eastern European countries formed a new market which had appeared after changes in their political structure in the early 1990s.

OECD countries always take first place in the table of the distribution of arrivals in Turkey by nationality (Table D93). In 1987, the eastern European countries overtook the Asian countries and became the second largest market in terms of volume of arrivals. As of 1997, the eastern European countries still appeared in the same order and the Asian countries came third. Other regions' shares remain very weak. In particular reference to tourist-generating markets, Germany is the number one country accounting for the majority of foreign tourist arrivals in Turkey. While its share was less than 1% in 1980, it reached about 24% in 1997, recording a significant performance over the last two decades. Tourists from the UK have more than doubled in the last few years, from 314,000 in 1992 (4.44%) to around 900,000 in 1997 (9.44%). Nearly one in eight British citizens choose Turkey for their holidays. Research findings predict that the number of British travellers going to Turkey will tend to increase in the future (Travis 1996).

Although Turkey relies on the British and German markets, the country attracts a wide range of tourism demand from the US, a large number of European countries and the former Communist countries, e.g. Yugoslavia, Romania, Poland and Russia. With the exception of the US, Turkey is unable to maintain the input from these countries in proportion to the total arrivals. Despite the fact that the number of foreigners coming from eastern Europe and the former Soviet states are rapidly increasing and even overtaking some other foreigners, some of those could not be regarded as genuine tourists since the main purpose of their visits to Turkey is to

shop and sell the merchandise they acquire in their own countries. This is due to the economic crises that first appeared in such countries in early 1990s.

Compared to the figures in 1985, there has not been much change in the share of such tourist-generating countries as Austria, Spain and Japan. There has been a positive trend in the share of arrivals from the Benelux countries, Israel, Bulgaria, Czechoslovakia and the Scandinavian countries. It is important to explain the reasons for the fluctuations in the market from Bulgaria in the early 1990s. These figures increased due to the large number of immigrants who came to Turkey as permanent residents and cannot be accepted as genuine tourists. Among those countries whose demand for Turkey as a tourist destination is decreasing are France, Switzerland, Italy, Greece, Syria, Iran and eastern European countries. As Turkey has extensive border-trading relations with Iran and Syria, its neighbours on the south-east, the proportion of these countries' nationalities visiting Turkey seems to be high.

In terms of comparison between Mallorca and Turkey, the former's tourist trade is dominated by the European markets, primarily British and German. These are also the major markets choosing Turkey, but the country attempts to extend its market to the US and Japan despite the distance barrier as well as eastern European countries. According to the figures of 1997 (WTO, 1999), the top four tourism spenders in international tourism are the US (14.6%), Germany (13.1%), Japan (9.4%) and the UK (7.9%). These findings endorse the attempts made by Turkey to extend the market. Nevertheless, Mallorca is heavily dependent on the two specific markets which account for an increasingly large share in the tourist trade each year. In terms of attracting domestic tourists, about 10% of all arrivals in Mallorca can be classed as domestic tourists including those who come from other islands and mainland Spain. It is difficult to calculate accurately the percentage of domestic tourism in Turkey due to the lack of reliable secondary data.

9.4. Analysis of Average Length of Stay

This type of measurement examines the average length of stay by nationality. Excluding those from France and Italy, it is clear that other tourist groups stay in Mallorca between 11 and 14 days. Compared to figures in 1990, tourists from Austria significantly reduced their annual average number of days, from 12.8 to 7.9 days. This market needs further investigation. There has been a slight decrease in other groups. The average length of stay is 11.80 days (Table D94).

There are variations in the length of stay by nationality in Turkey. There appears to be a low level of stays ranging between two and seven days. As of 1997, the longest average staying periods were realised by Austrian, German, British and Scandinavian tourists. From 1990 onwards, with the exception of Romania, Japan, the US and Switzerland, all countries increased their average length of stay. This could be largely due to the increase in package holidays, especially to the west coast and south of Turkey. Overall, the average length of stay in Turkey remains at a low level, at just 3.56 days. This figure has shown no significant variation from one year to the next (Table D95).

Comparison between both destinations indicates that tourists travelling to Mallorca have a much longer period of overnight stay than those in Turkey. These figures were doubled by German tourists in Mallorca and tripled by those from the UK, Switzerland and the Benelux countries. France and Italy have about four-fold longer stays in Mallorca. The period of overnight stay brings both advantages and disadvantages depending upon tourists' socio-economic and socio-demographic characteristics, their intention to spend, and the types of accommodation facilities or holidays they prefer. As mentioned in Chapter 7, some tourists stay longer but spend less. Some others stay for a shorter time while spending more. This relationship needs a further investigation. The difference in the average period of overnight stay between the two destinations can be accounted for by Mallorca's higher proportion of package holidays which tend to run for a minimum of seven days.

9.5. Analysis of Foreign Tourist Arrivals by Months

The examination of the volume of foreign tourist arrivals by months could indicate how seasonal the tourism product is in a destination or a country. The analysis of its past and current figures is also helpful for investigating if there is any difference over years and between destinations.

The tourism industry in Mallorca not only displays a heavy concentration of its market on two specific nationality groups, but is also concentrated in terms of time, specific social groups and in space. The temporal concentration is between the months of May and September, especially in July and August when 72% of all foreign visits take place (Table D96). Thus, the majority of visitors are coming to enjoy the summer sunshine, with an emphasis on sunbathing and water activities. The direct consequences of seasonal concentration are exceeding the carrying capacity of the destination and environmental problems have become a major concern of tourism in Mallorca. There is an ongoing attempt to widen tourism products in Mallorca into other months by attracting senior citizens and providing sports activities and facilities.

As in Mallorca, demand for tourism in Turkey is also highly seasonal and is concentrated in the peak summer months particularly from June to September (Table D97). The reasons for this are speculated as being the holiday-taking patterns of tourist-generating markets (e.g. school and work holidays) and the seasonal climate of the tourist-receiving countries. The structure of seasonality is unlikely to change in the very near future even though efforts are still being made by both public and private industry.

Although there are some differences between the tourism industries of both areas, each place as a Mediterranean destination has overlapping similarities in terms of tourism and geography. Turkey and Mallorca are in the Mediterranean tourism region, which is highly competitive in international tourism. Meanwhile, the major

reasons for visiting both destinations in summer are to enjoy sea, sand and sun (3Ss). Turkey and Mallorca are two examples of established international tourist destinations dominated by the inclusive tour market and heavily dependent on tour operators. Mass tourism still preserves its importance to both destinations. Both are now attracting Cohen's (1972) 'organised mass tourists' who rely on a holiday company. Therefore, seasonality is a feature of tourism and a problem, particularly for mass tourism destinations.

9.6. Analysis of Tourism Receipts

This study considers the volume of total tourism receipts as a significant indicator of the measurement of destination performance and its competitiveness due to its strong multiplier effects. This criterion is evaluated in two stages: the proportion of tourism receipts in GNP and export earnings (internal performance), and its proportion in Mediterranean and international tourism (external performance).

As a result of the difficulty of finding specific figures for tourism in Mallorca, the analysis of this section is carried out by interpreting tourism income figures for the whole of the Balearic Islands from 1990 (Table D98). Revenue from international tourism is important to the national economy of the Balearic Islands. Tourism is the top foreign exchange earner in the national economy with its contribution 85% of export earnings. Tourism income also accounts for about 34% of the GNP. Their contribution to Mediterranean and international tourism is not stable. They accounted for 5.21% of Mediterranean tourism in 1990 and 5.59% in 1991; then it began decreasing to 4.64% in 1993. This pattern was also mirrored in relation to their share in the international market. Both figures slightly increased in 1994 and 1995, but recorded a negative trend in 1996. As data for export earnings are limited at the year base, analysis is based on the other three options. The Balearic Islands have had a consistent share in Mediterranean and international tourism; thus, they each increase or decrease proportionately from one year to another. This indicates the external performance of the destination. In terms of measuring the inter-

nal performance, with its remarkable place in the national economy, tourism constitutes approximately one-third of the GNP figures.

Tourism contributes a great deal to Turkey's economy and has tremendous positive affects on foreign exchange reserves and the national balance of payments (Table D99). Tourism revenues accounted for 4.2% of GNP as of 1997 whereas it was only 0.1% in 1963. The share of tourism receipts in exports increased from 11.2% in 1980 to 30.8% in 1997. The Turkish balance of payments has been traditionally characterised by a deficit in the balance of trade, which is easily compensated for by tourism. The tourism balance of payments has always yielded a large positive result (\$4 billion surplus in 1995). The economic impact of international tourism in the area has remained relatively small generating only \$8 billion in tourism receipts despite attracting around 9.6 million foreign arrivals.

According to WTO statistics (Table D99), the share of the Turkish tourism industry within both the Mediterranean and world tourism markets is significantly increasing. For instance, Turkey's contribution of tourism receipts to world tourism reached 1.82% in 1997 while it was only 1.25% in 1990. However, The Gulf War affected the tourism industry in Turkey between 1991 and 1992 as it did other major tourist destinations within the region. International tourism earnings dropped by 18% in 1991 while it increased ten-fold between 1980 and 1991. This figure was much greater than similar revenue in Greece and Portugal. It has subsequently begun to recover, with \$3,639 billion generated in 1992 and \$4,321 billion in 1994 and \$7 billion in 1997. Although the number of tourist arrivals experienced a massive decrease in the share of the Mediterranean and world tourism activities in 1993 and 1994, it is an optimistic result to see an increase in the proportion of tourism receipts over the same categories. The number of foreign arrivals experienced a massive 10% decrease in 1993.

As a result, one may generalise that the growth rate of tourism income and its share in world tourism is favourable. Turkey has now been ranked 20th in the list

of world tourist attracting countries based on the total of tourism receipts, whilst in 1980 it was only ranked 46th. It is assumed that tourism will be the leading industry in the country's economic structure and that Turkey will occupy a leading place amongst the tourist-receiving countries in the beginning of the 21st century. Tourism receipts are estimated to reach \$13.8 billion by 2000 (Ministry of Tourism 1995). It is predicted that Turkey will be the fastest growing destination amongst the OECD countries over the next ten years (*The Times* 1997a).

Comparison between Mallorca and Turkey reveals that the former has not been stable since 1990 but the latter has been progressing well on the basis of the proportion of tourism income in Mediterranean and international tourism. Direct comparison between two destinations seems to be difficult due to differences in the structure of the national economy. The national economy in Turkey is diverse with industries of agriculture, textiles and, to a lesser degree, manufacturing while Mallorca is dominated by tourism as a single industry making a massive contribution to the local economy. The improved service quality, specialisation and many years of experience are the strengths of Mallorca against Turkey. The contribution of tourism to the national economy in Mallorca is much stronger than that in Turkey. Tourism incomes in Mallorca constitute about 35% of GNP compared to only 4% in Turkey. Unsurprisingly, the proportion of Turkey's share in Mediterranean and international tourism is greater than Mallorca's both in terms of the volume of tourist arrivals and tourism incomes. Although Turkey virtually seems to be stronger than Mallorca; in fact, Mallorca must be regarded as a stronger destination since it is much smaller than Turkey in terms of both economic and geographic indicators.

Considering the external performance analysis, both destinations experienced some brief interruptions in terms of the proportion of tourist arrivals and tourism incomes from Mediterranean and international tourism, e.g. between 1988 and 1992 in Mallorca and in 1986, 1993 and 1994 in Turkey. Based upon figures presented in Table D98 and D99, one could suggest that the calculation of the percentage

share of tourism income in the main indicators of the national economy or in the figures of Mediterranean and international tourism is a more appropriate method to measure the development of the national tourism industry. An increase in the amount of tourism income compared to previous years sometimes does not refer to a similar contribution to the national economy or an increase in the share of international tourism.

9.7. Overview of Quantitative Measures

This chapter has investigated developments in Mallorca and Turkey as peer tourist destinations based on the assessment of historical data. It has also looked at the similarities and differences between the two in terms of several quantitative measures. The volume of tourist arrivals was interpreted on internal performance measures such as years, months, nationality and length of stay; and external performance measures such as its share in Mediterranean and international tourism. The volume of tourism receipts was analysed as its share in GNP and export earnings as internal performance measures and in its share of Mediterranean and international tourism as external performance measures. At present the effective evaluation of some figures is limited due to the lack of data, i.e. records only going back by a few years or insufficient comparisons. As more data become available there will be the potential to compare these figures with those of the Mediterranean and international tourism industry.

An overview of findings is showed in Table 9.1. Based on outputs, these findings are crucial in a destination benchmarking investigation. The comparative assessment of quantitative measures could pinpoint whether the sample destinations have the same structure of tourism development and if not, where they differ. These type of measures and their assessment, from the perspective of internal or external performance, can be used in destination benchmarking in two ways. The first is the stage before benchmarking. The second is the stage where benchmarking has been completed and improvements are expected.

Table 9.1. Overview of Quantitative Measures

Measures	Internal Performance		External Performance
	Mallorca	Turkey	
Accommodation stock	Largely dominated by small- and medium-scale hotels and apartments. Needs to be upgraded.	As it is a very young destination, there has been a remarkable increase over the last 15 years, especially in large-scale hotels and holiday villages.	There is a greater proportion of small- and medium-scale establishments in Mallorca than in Turkey. Turkey has slightly more rooms than Mallorca.
Tourist Arrivals	There has been an increase despite several fluctuations	Recorded a stable increase.	Mallorca is unable to sustain its proportion in Mediterranean and international tourism. Turkey is progressing well by increasing its proportion in the same figures.
Tourist Arrivals by Nationality	Heavily dependent on two specific markets, Britain and Germany.	Heavily dependent on German and eastern European markets	As for comparison between Mallorca and Turkey, the former attracts mainly European tourists as the latter focuses on OECD and eastern European markets.
Length of Stay	Average length of stay is 11.8 days. This figure has decreased since 1990.	Average length of stay is 3.56 days. There has been a slight increase since 1990.	Mallorca has a much longer period of stay in general. Tourists from Germany, UK, France and Italy stay much longer in Mallorca.
Tourist Arrivals by Months	Tourism demand is highly seasonal concentrating in peak summer months.	Tourism demand is highly seasonal concentrating in peak summer months.	As for comparison between Mallorca and Turkey, both have the seasonality problem.
Tourism Receipts	The contribution of tourism receipts to national economy is significantly increasing.	The contribution of tourism receipts to national economy is gradually increasing.	Mallorca has had an unstable record in the proportion of Mediterranean and international tourism. Turkey's proportion in Mediterranean and international tourism is significantly increasing. Compared to those in Turkey, tourism receipts in Mallorca make a massive contribution to the economy.

First, as in individual organisations, destination managers also need to gather data to assess the level of their internal or external performance and monitor changes on it periodically. Either in internal or in external benchmarking, it is possible for destination managers to evaluate their performance levels and progress recorded compared to the indicators of international tourism and also against other destinations. This process may be helpful to decide whether the destination needs to be involved in any kind of benchmarking exercise at a broader level. If so, policymakers, destination managers and representatives of tourism businesses may need to collaborate to explore the factors influencing the development of tourism in other countries and what types of problems they are still experiencing or have experienced in the past. The investigation of methods or strategies used to eliminate these problems could also be worth carrying out. For instance, even though Mallorca is a mature mass tourism destination, which particularly attracts tourists in summer season, it is worthwhile examining how it is progressing in transforming itself from a summer

to a winter destination. This type of data assessment could then be helpful for establishing local or national tourism policies, laws and regulations to bring the tourism industry up to the desired level. However, due to economic and geographical differences, it is only possible to consider the volume of tourist arrivals by nationality, months and length of stay, as quantitative measures for a direct comparison between peer destinations.

Second, improvements in qualitative measures are expected to stimulate developments in the success of quantitative measures. Although the purpose of benchmarking is to sustain quality improvement, the expected result is to enable an increase in outcome or output measures. Quantitative measures seem to be useful in assessing the success of the implementation of earlier benchmarking findings which are based upon qualitative measures, such as tourist satisfaction if a proper destination benchmarking study is conducted and is given time to obtain the essential feedback in return. These quantitative measures may be influenced by changes in products or markets depending upon destination positioning studies or improvements in the overall performance of the destination as an impact of increase in satisfaction or positive word-of-mouth recommendation. If benchmarking is applied to increase in tourist arrivals or revenues and widen its multiplier effect in low season, the recorded progress in input measures must be directly reflected by outcome measures sooner or later. This must be a function of the review stage in benchmarking, which is not to be tested in this study due to the time needed to implement findings and regularly monitor its impact.

As for the limitation of using such quantitative measures in destination benchmarking, the link between qualitative and quantitative measures cannot be established in this study. Moreover, as briefly mentioned in this chapter, there could be several external factors influencing the success of the tourism industry in a destination either in the short- or in the long-term. As they are uncontrollable and unpredictable, this study excludes the possible impacts of factors such as distance and risk and the possibility of emerging alternative destinations. Domestic or interna-

tional social and political unrest are other issues which need to be considered within the perceived risk of tourist destinations. For instance, the existence of unrest in some countries such as Romania, the former Yugoslavia, Tunisia and Egypt in recent years has negatively affected their trends in the development of tourism activities.

9.8. Summary

This chapter has attempted to present the level of both countries' performance in the different areas of quantitative measures and a short discussion about how tourism authorities can use such data as performance indicators of a destination benchmarking exercise. Quantitative measures can be used as an element of destination benchmarking. As outputs, they could be useful in evaluating the results of earlier benchmarking programmes. However, the examination of findings suggests that the inclusion of some quantitative measures such as the total volume of tourist arrivals or tourism income in external destination benchmarking seems to be limited due to differences in economic indicators between destinations. The analysis of both primary and secondary data is now complete. The next chapter will set out a discussion of research findings in respect of both theoretical and practical implications.

Chapter Ten

Discussion

10.0. Introduction

This chapter sets out a general discussion of research findings in respect of both theoretical and practical implications. It is based upon data gathered by primary and secondary data collection methods and analysed in the previous chapters. The chapter starts by presenting theoretical implications considering research hypotheses and contributions to the existing benchmarking and destination competitiveness literature. The potential differences between organisation and destination benchmarking are briefly examined. In the light of benchmarking findings, practical implications and recommendations for both sample destinations are finally discussed.

10.1. Theoretical Implications

As discussed earlier, there are deficiencies in both the theory and practice of benchmarking. Major criticism focuses upon the types of benchmarking used, types of measures developed and methods used to test them, and the investigation of cross-cultural differences either between organisations (or destinations) or between customers. Given this, the theoretical implications of this study are based upon the discussion of four sets of hypotheses detailed in the methodology chapter, and their outcomes as a contribution to the existing benchmarking and destination competitiveness literature. The discussion starts with an overview of research hypotheses. It then briefly discusses findings and their contribution to the literature on the basis of the model proposed and practices, methods and tools used.

10.1.1. Discussion of Hypothesis 1

Benchmarking can be applied to tourist destinations to identify their performance gaps and take action for improvement. This requires the establishment of destination-specific performance measures.

This hypothesis aims to determine whether the benchmarking approach can be applied to tourist destinations, in particular whether it can be used to identify internal and external performance gaps. Qualitative measures included the assessment of tourist motivations, satisfaction and comments. Quantitative measures comprised the assessment of tourist arrivals and their distribution by nationalities and months, average length of stay, annual tourist incomes, number of previous visits, and tourist expenditure and its distribution into sub-categories. A list of qualitative and quantitative measures developed and tested in this study is presented in Table 10.1.

Table 10.1. Measures Developed and Tested.

Measures	Internal	Analysis	External	Analysis	Methods
I. Qualitative Measures					
Motivations	N/A	N/A	X	Comparison between peer destinations	X^2 and t-test
Tourist satisfaction	X	1. Identifying the impacts of items on overall satisfaction and future behaviour 2. Examining repeat tourists' perceptions of changes in the destination	X	1. Comparison of between peer destinations 2. Comparison between the sample and other self-selected destinations	Factor analysis, regression analysis and t-test
Tourist comments and complaints	X	List of attributes need to be improved	X	Comparison between peer destinations	X^2 test and content analysis
Future behaviour and intention	X	How likely tourists are to come back and recommend	X	Comparison between peer destinations	t-test
II. Quantitative Measures					
Volume of tourist arrivals	X	Compared to previous years	X	Share in Mediterranean and international tourism	N/A
Distribution of tourist arrivals by nationality	X	Compared to previous years	X	Comparison between peer destinations	N/A
Average length of stay	X	Compared to previous years	X	Comparison between peer destinations	N/A
Average length of stay by nationality	X	Compared to previous years	X	Comparison between peer destinations	N/A
Distribution of tourist arrivals by months	X	Compared to previous years	X	Comparison between peer destinations	N/A
Volume of annual tourism receipts	X	1. Compared to previous years 2. Share in export earnings 3. Share in GNP	X	1. Share in Mediterranean and international tourism 2. Comparison between peer destinations	N/A
Number of repeat visits	N/A	N/A	X	Comparison between peer destinations	X^2 test
Level of tourist expenditure	N/A	N/A	X	Comparison between peer destinations	X^2 , t-test, regression

N/A: Not available in this study.

Tourists' own motivations such as relaxing, meeting other people, the opportunities for sports or sunbathing are vital in influencing their decision to go on holiday or in selecting a destination. It is difficult to respond to customer needs and wants and to grasp the extent to which products and services at the destination can match their motivations unless priority is given to examining them. Sandbach (1997) underlines the importance of understanding what customers want, what motives they have and how satisfied they are with various destinations, in order to be competitive in the market. Examination of motivations or the reasons for choosing a particular destination as performance measurement criteria could provide valuable implications for destination benchmarking in order to identify the profile of tourists a destination attracts. Using t- and chi-square tests, this study showed significant differences in tourist motivation between two destinations. These findings could help not only to identify how one destination can differentiate itself from others but also in the choice of a partner destination suitable for external benchmarking.

This study revealed that the impacts of destination-based satisfaction items on the level of overall satisfaction and future behaviour, and repeat tourists' perceptions of changes in the performance of destinations compared to preceding years, could be considered as qualitative measures to investigate the internal performance of destinations. The rationale for such an analysis stems from the existence of different customer groups for each destination and of cultural differences in practices and laws between various destinations. In addition, the way in which tourists are satisfied may vary from destination to destination. In terms of external benchmarking, as the comparison of mean scores between peer destinations and the comparison between the sample and other self-selected destinations are the subject of the next hypothesis, they are not explained now. However, it is apparent that such an analysis reports differences in regard to the areas of strengths and weaknesses of one destination vis-à-vis another.

In addition to the measurement of tourist satisfaction, the assessment of tourist complaints and comments also worked fairly well indicating major areas where

both destinations need to consider improvements, e.g. level of prices and tourism development in Mallorca; and harassment, poor signposting and poor air-conditioning in Turkey. These are the areas tourists mentioned important to their holidays but lacking or getting worse. These findings were obtained from tourists' own experiences not only in the sample destination but also in other self-selected destinations; therefore the level of comments or complaints could be effective measures to learn about a destination's performance in the international market and whether it is essential to carry out benchmarking.

In terms of evaluating the repeat tourists' perceptions of changes within destinations compared to their earlier visits, these instruments provide significant implications for practitioners. Repeat tourists have a wider and more in-depth experience of the same destinations than those who are on their first visit (Cohen 1974; Crompton and Love 1985; Laws 1991). First-time tourists take time to get to know the surroundings of the hotel and try to explore other resources at the destination. Repeat tourists not only revisit familiar places but also extend their knowledge of them and visit other places to gain a broader perspective. Thus, observations and comments of repeat tourists could be valuable for evaluating the overall performance of a given destination and how it is continuously performing.

The examination of actual tourists' intention of revisiting the same destinations or visiting other destinations in the country and of recommending their holiday experiences to their friends and relatives could be a valuable criterion while assessing the internal performance of one destination. For instance, a high level of intention for word-of-mouth communication could mean that the destination is found to be satisfactory. Its comparison to other destinations could indicate how better one destination performs than others in these respects (external performance). If tourists in other destinations have a higher intention of repeat visits or recommendation, then its reasons could be investigated, e.g. Turkey in this research. As for the limitation of this method, it is clear that some tourists tend to visit different destinations for the following holiday despite the fact that they have found the previous

destination they visited extremely satisfactory. This means that sometimes there could be no association between the perceived performance of one destination and the intention to return, but this may not apply to the intention of recommendation.

As far as quantitative measures are concerned, changes in the performance of destinations on the basis of the volume of tourist arrivals and their distribution by nationality and at different times of the year could be observed. This enables seasonality and changes in the distribution of markets to be benchmarked. These historical records provide a good opportunity to evaluate how a specific destination performs over time and to monitor whether improvements in qualitative measures are effective in outcome (quantitative measures) since benchmarking aims at continuous improvement in an operation.

The volume of tourist arrivals is interpreted on various criteria such as by years, months, nationality and overnight stays as internal performance measures; and its share in Mediterranean and international tourism as external performance measures. The volume of tourism receipts is analysed as its share in GNP and export earnings as internal performance measures and in its share of Mediterranean and international tourism as external performance measures. As far as comparison between qualitative and quantitative measures is concerned, quantitative measures such as occupancy rates, number of tourist arrivals, average length of stay, level of repeat visits and the level of tourist expenditure could be easier to measure, to evaluate the performance of the destination and find reliable metrics in relation to comparable destinations.

A number of points need to be considered when creating measures, e.g. making measures easy to control and thinking in a broader perspective (Hauser and Katz 1998). When incorporating this idea into the quantitative performance measurement of tourist destinations, limiting the comparison of tourist arrivals only to previous years would be too narrow a choice. Taking the number of tourist arrivals or the value of tourism receipts of a country and comparing them to total international

tourism statistics may give a clearer picture of a destination. This type of analysis showed the significance of tourism revenues in the national economy as a measure of internal performance, and in Mediterranean and international tourism as a measure of external performance. It is a weak criterion to consider that the national tourism industry is improving to some extent or that the national economy makes a good profit from the tourism industry once an increase is observed in terms of the number of tourist arrivals or the total income from tourism compared to previous years. It is possible either that international tourism is developing as a whole or that the national economy itself is growing.

Unlike the amount of tourism income and the total number of tourist arrivals, some other proposed quantitative measures such as the examination of the distribution of tourist arrivals by nationalities and by months, and the average length of stay and its distribution by nationalities could be considered as examples of both internal and external benchmarking. Comparison to previous years' figures indicates areas where changes are observed in the market structure (internal benchmarking). For example, a significant increase is observed in the proportion of those from eastern Europe and the former Soviet states visiting Turkey over recent years. In contrast, there has still been an increase in the proportion of British and German tourists in Mallorca. In the light of this statement, comparison between peer destinations could reveal in which markets the host and the partner are more attractive and the periods of the year in which tourism is concentrated (external benchmarking).

This study revealed that as one destination attracts a higher number of repeat tourists another declines. The consideration of the number of repeat tourists as a criteria could show reasons why repeat tourists are likely to come back or the extent to which the destination is attractive to a particular market group. Is it an attractive destination meeting customers' expectations? Or are there any other reasons reflecting either destinations' or customers' characteristics? This study confirmed that familiarity and satisfaction are amongst the primary factors attracting repeat tourists to Mallorca.

In terms of measuring the contribution of tourist expenditure to the local economy in total and its distribution into several sub-categories, there are differences between the two destinations. For instance, those in Turkey spent more on clothes than those in Mallorca just as those in Mallorca spent more on daily tours and rent-a-car services than those in Turkey. This part of destination benchmarking research has great potential for further development because the investigation of differences in the amount or the proportion of tourist expenditures on various categories provides answers to a number of questions, e.g. why those in one destination spend more on one category than those in another destination?

This study has attempted to develop and test a variety of qualitative and quantitative destination benchmarking measures. As discussed in earlier chapters, there is no single best practice which can bring performance improvement and competitive advantage. The selection of measures therefore depends on the aims and objectives of each destination authority. Different destinations might have different objectives and expectations from the tourism industry. Some destinations tend to offer a variety of tourist facilities and activities and be year-round destinations which attract top-class customer groups. Some others offer only seasonal facilities and services for middle or low income customer groups. As a result, the rationale for measuring performance differs from one to another. One might use it to increase customer satisfaction and subsequently raise the volume of arrivals or tourism receipts. Another may think that it is an effective method of having a sustainable form of tourism development within the area, despite fewer tourists or a lower tourism income.

10.1.2. Discussion of Hypothesis 2

Where tourists have visited multiple destinations comparative surveys are used to explore performance gaps.

This hypothesis was based on the assumption that tourists visiting multiple destinations would be better able to identify gaps between the performance of different destinations. To test this hypothesis, two types of questionnaire were designed.

The first questionnaire (Q 2) aimed to measure the performance of one destination against another (peer destination) on various attributes by employing a revised form of semantic differential scales and asking tourists, who visited both destinations, to compare them directly on the same questionnaire. Findings were analysed to investigate which destination was perceived by those who knew both to be better or worse than another. The next questionnaire (Q 3) was designed to understand how one particular destination was perceived compared not only to one other destination but also to multiple destinations. As in the earlier questionnaire, the rule here was that tourists should have travelled to these destinations and have selected only one of them to compare with the sample destination.

The contribution of this hypothesis refers to the significance of choosing a correct sampling method. As discussed in Chapter 6, consumer behaviour research considers the examination of the strength or weakness of services from the perspective of those who have experienced them. If the purpose is to measure the performance of any destination, either host or partner, and use the term 'performance ratings', the sample can be selected from amongst those who had holiday experiences in both destinations. As shown in Table 10.2, the findings of questionnaire 2, with few exceptions, confirmed those of questionnaire 1. Such direct comparison surveys could be used to make a further contribution to the benchmarking literature by directly comparing a destination's performance with that of another (perhaps with the partner). As external benchmarking is part of the comparison process with others dealing with similar issues, the advice should be to choose a destination which is in the same competitiveness set.

In addition to questionnaire 2, the use of questionnaire 3 also has valuable implications for destination benchmarking research. This instrument was designed to measure one's performance not only against some specific destination but also its major competitors. It could be regarded as a valuable instrument in comparing a destination's performance with that of some other self-selected destination probably in the same competitiveness set. The destination authority is able to understand not

only its own perceived performance against one destination but also against its main competitors. In addition, this instrument helps to view both positive and negative aspects of the tourism product a destination delivers. For instance, harassment was found to be the most serious problem in Turkey compared to other European destinations, though outside Europe, e.g. in Gambia, the problem is perceived to be worse. Similarly, Turkey is perceived to have a better tradition of hospitality than several of its European counterparts.

Table 10.2. Comparison between findings of Questionnaire 1 and Questionnaire 2

Factor Attributes	Questionnaire 1	Questionnaire 2
I. British Tourists		
Accommodation services	No statistical difference	Turkey is perceived to have better
Facilities and activities	No statistical difference	Turkey is perceived to have better
Local transport services	Turkey is perceived to have much better	Turkey is perceived to have much better
Hospitality and customer care	Turkey is perceived to have much better	Turkey is perceived to have much better
Resort airport services	Mallorca is perceived to have better	Mallorca is perceived to have better
Hygiene, sanitation&cleanliness	No statistical difference	Turkey is perceived to have better
Level of prices	Turkey is perceived to have much better	Turkey is perceived to have much better
Language communication	No statistical difference	Turkey is perceived to have better
II. German Tourists		
Accommodation services	Turkey is perceived to have better	Turkey is perceived to have better
Facilities and activities	Turkey is perceived to have better	Turkey is perceived to have better
Local transport services	Turkey is perceived to have much better	Turkey is perceived to have much better
Hospitality and customer care	Turkey is perceived to have better	Turkey is perceived to have better
Resort airport services	Turkey is perceived to have better	Turkey is perceived to have better
Hygiene, sanitation&cleanliness	Turkey is perceived to have better	Turkey is perceived to have better
Level of prices	Turkey is perceived to have better	Turkey is perceived to have better
Language communication	Mallorca is perceived to have better	Mallorca is perceived to have better

10.1.3. Discussion of Hypothesis 3

There are differences between tourists from different countries visiting the same destination. This issue needs to be considered while forming a destination benchmarking study.

Differences in qualitative and quantitative measures between tourists from different countries visiting the same destination were investigated to test this hypothesis. Findings are presented in Table 10.3. This study found significant differences in the proposed measures between tourists from the UK and Germany.

The analysis of findings demonstrated that British tourists were more likely to be satisfied with almost all individual attributes found to be statistically significant at any probability level than German tourists visiting both Mallorca and Turkey. Ex-

ceptions were the quality of food at the accommodation facilities and at the destination's bars and restaurants in Turkey, and the availability of day tours to other destinations and main tourist attractions in Mallorca. Overall, considering only factor items, the largest gaps between German and British tourists' satisfaction levels appeared for the level of language communication, availability of local transport services and level of prices in Turkey and for the level of prices, level of hygiene, sanitation and cleanliness, availability of facilities and activities, level of language communication and level of accommodation services in Mallorca; in each case the British tourists responded more favourably. Perhaps these are the potential areas where destination authorities should investigate the root causes of such differences. Some of these findings are congruent with those of the tourist comments survey. German tourists are more concerned about the improvement of cleanliness, the level of prices, language communication and quality of accommodation while British tourists are more concerned about the problem of harassment or attitude.

Table 10.3. Comparison between British and German Tourists by Measures

Measures	Mallorca	Turkey
I. Qualitative Measures		
Motivations		
<i>Culture</i>	Higher scores by German tourists	No statistical difference
<i>Pleasure and relaxation</i>	Higher scores by German tourists	Higher scores by German tourists
<i>Fantasy</i>	Higher scores by British tourists	Higher scores by British tourists
<i>Physical</i>	Higher scores by German tourists	Higher scores by German tourists
Tourist Satisfaction with		
<i>Accommodation services</i>	Higher satisfaction by British tourists	No statistical difference
<i>Facilities and activities</i>	Higher satisfaction by British tourists	No statistical difference
<i>Local transport services</i>	No statistical difference	Higher satisfaction by British tourists
<i>Hospitality and customer care</i>	No statistical difference	No statistical difference
<i>Resort airport services</i>	No statistical difference	No statistical difference
<i>Hygiene, sanitation & cleanliness</i>	Higher satisfaction by British tourists	No statistical difference
<i>Level of prices</i>	Higher satisfaction by British tourists	Higher satisfaction by British tourists
<i>Level of language communication</i>	Higher satisfaction by British tourists	Higher satisfaction by British tourists
Tourist comments	German tourists were concerned more about the overall cleanliness of resorts, level of prices, quality and variety of food, the attractiveness of natural environment, signposting, quality of accommodation, availability of sports facilities and activities, language communication and feelings of personal safety and security; British tourists were more keen on the further improvement of the attitude of shopkeepers and local people.	German tourists were concerned more about the overall cleanliness of resorts, attitude of shopkeepers, level of prices, language communication and quality of accommodation facilities. British tourists specifically emphasised the 'harassment' problem.
II. Quantitative Measures		
Volume of annual arrivals	German tourists had higher proportion (45%)	German tourists had higher proportion (24%)
Length of stays	German tourists stay slightly longer	German tourists stay slightly longer
Number of previous visits	More repeat visits by British tourists	More repeat visits by German tourists
Level of tourist expenditure	More spending by British tourists	More spending by British tourists

Personal observations partially support the statement that these findings demonstrate the real performance of destinations in different respects. For example, the largest gap between mean scores of British and German tourists concerned the level of language communication with local people or staff in Turkey. The reason could be that the destinations where this survey was conducted concentrated on attracting customers primarily from the British market. Thus, the primary foreign language in these places is English. The share of the German market is growing, albeit slowly, as a result, some problems with the German language could have arisen. Moreover, the second largest gap between mean scores of British and German tourists' perceptions of satisfaction in Turkey related to the level of prices. The weak value of the TL against foreign currency exchange rates could be mentioned in this part of the study. Past research indicated that tourism demand from the UK market ($\beta=3.419$) is much more sensitive than that from the German market ($\beta=1.188$) towards changes in the value of its own currency against the TL (Icoz, Var and Kozak 1998). This could be one explanation of why British tourists had higher satisfaction scores for the level of prices in Turkey and why they spent more than German tourists.

Whiting (1968) notes that considering more than one organisation or customer group in empirical studies may make the generalisation of the findings possible. In line with this statement, one could suggest that British tourists are likely to have higher satisfaction outcomes than their German counterparts regardless of the destinations they both visit. This supports Pizam's (1994a) prediction stating that tourist satisfaction is not a universal issue and not everyone gets the same satisfaction from the same service experience. Yi (1990) classifies the product or service performance into two categories: objective and perceived performance. The former reflects the actual level of the product or the service performance and is believed to be constant across customers. The latter is assumed to be changeable from one customer group to another. As a result, this study provides grounds to suggest that some destination-based tourism products and services fall into the category of the perceived performance, e.g. the level of prices, the level of language communica-

tion and so on. While one nationality is less satisfied, some others may be more so. It may be difficult to consider every customer's comments and complaints and alter tourism products and services in accordance with them. For instance, what would happen if one nationality was dissatisfied with standard of cleanliness of the beaches and sea while another was perfectly satisfied?

On the basis of comparison of the socio-economic and socio-demographic differences between the two samples in Mallorca, British tourists had a higher tendency than German tourists to buy all-inclusive and self-catering holidays, stay for two weeks, stay in apartments, choose their first destination and book their holidays earlier, represent older age groups, have a higher number of repeat visits and to travel with more companions, both adults and children. Comparison between British and German tourists in Turkey indicated that the latter group was more likely to choose all-inclusive and half-board holidays, stay in hotels, stay between 8 and 13 days or between 15 and 20 days. German tourists in Turkey also booked their holidays earlier, returned more often, had less intention of choosing Turkey as a first destination and were more often accompanied by children.

Further differences are recorded in quantitative measures between British and German tourists. The latter group has a greater proportion in the number of total tourist arrivals to both destinations. This group stays slightly longer in both destinations. In terms of the extent of repeat visits, German tourists in Turkey and British tourists in Mallorca make a higher number of repeat visits. British tourists spent more than German tourists in both destinations.

In the light of these findings, one could suggest that a separate benchmarking study should be undertaken for each customer group representing a particular country. This might cover all the stages, either in internal or external destination benchmarking, from performance measurement to taking action. This would make the assessment of destination performance and comparison process between peer destinations simpler.

10.1.4. Discussion of Hypothesis 4

The comparison of international tourist destinations is impeded by their cultural, economic and geographical differences. These need to be considered while proposing a destination benchmarking study.

The purpose of this hypothesis was to examine political, cultural, economic and geographical differences between international destinations. A discussion is also carried out to include the demand-based factors. A summary of the discussion is presented in Table 10.4.

Table 10.4. Main differences between Mallorca and Turkey

Factors	Mallorca	Turkey
I. Political Factors		
EU membership	A Member of EU	Not a member of EU
Government system	Decentralised system	Centralised system
II. Cultural Factors		
Hospitality	Local people see foreigners as tourists and do not pay much attention. Harassment is very rare.	Local people regard foreigners as guests and attempt to treat them in a hospitable and friendly way. Local shopkeepers see tourists as customers to earn much money.
Bargaining while shopping	Not a cultural tradition	A cultural tradition
Cultural attractions	Has limited cultural attractions	Has diversified cultural attractions
Language communication	Welcomes all people from the UK and Germany either as tourists or residents or entrepreneurs	Used to be a closed country to Europe. Learning another language is recently becoming more important among individuals
III. Economic Factors		
National economy	An homogeneous economy	A diversified economy
Accommodation stock	Small- and medium sized establishments. Self-catering apartments	Medium- and large-scale establishments. 4 and 5 star hotels, Clubs.
Strength of currency	Much stronger	Much weaker
IV. Geographical Factors		
Size of land	Smaller	Much larger
Natural attractions	Has limited natural attractions	Has diverse natural attractions
V. Demand-based Factors		
Number of previous visits	Higher number of repeat visits (British tourists)	
Type of holiday	Greater intention to choose half-board and self-catering (British tourists)	More likely to book all-inclusive and stay in holiday villages (German tourists)
Length of holiday	Less than two weeks (British tourists)	Less than two weeks (German tourists)
Income levels	Higher income levels (British tourists)	Lower income levels (German tourists)
Number of people in the party	Higher proportion of companions (British tourists)	
Booking holidays	Much earlier, e.g. at least 7 months in advance (British tourists)	Earlier, e.g. at least 4 months in advance (German tourists)
Age		Younger age (German tourists)

Given examples from this study, Mallorca is seen to have a better technology system and has the benefit of being a member of the EU which aims to raise the competitiveness of its member countries by improving their environment and labour quality. The EU sometimes publishes specific tourism plans to provide tourist des-

tinations with guidelines and funds, e.g. the Community Action Plan to Assist Tourism, between 1993-1996, with a total budget of ECU18 million (EIU 1993). Moreover, as a result of EU regulations, bills can be paid in the Euro currency as well as in the local currency. Such an application would make it easier for a tourist from a member country of the EU to exchange money before or during the holiday. Tourists could easily compare the level of prices at the destination with those in their own country as prices are expected to be in harmony among the member countries.

There are political factors that make the operationalisation of destination benchmarking slow, such as passport, visa and custom control at the airport in Turkey. Resorts in Mallorca take more care over providing facilities for disabled people as a sign of commitment to the EU regulations. Turkish resorts seem to be careless about this as there is no formal sanction to be followed. The authorities and tourism organisations in Mallorca must continuously check the level of their facilities and services' performance in accordance with the EU standards and guidelines. Turkey, now accepted as an applicant for full membership of the EU, will have to revise its laws, regulations and practices. This could offer Turkey an opportunity to close some of the gaps between itself and other European destinations.

Differences could be observed among different international destinations in respect of the organisational structure of their governments. For instance, as explained extensively in Appendix A, Turkey has a centralised government system where the central government has the power to set goals, take decisions and implement them while Mallorca has a decentralised system where local government and city councils are given the power to take decisions and collaborate. As Keller and Smeral (1997) emphasise, keeping bureaucratic barriers to a minimum could improve tourist services and quality which will lead to enhancing competitiveness in the international arena. The former model may create bureaucratic problems and delays in making efficient decisions since the central government deals with everything in the country. Political unrest may sometimes make it worse. In the latter model, lo-

cal institutions are given the responsibility of regulating tourism businesses and activities, inspecting and supervising them and developing their own promotion campaigns, locally and abroad, in order to renovate and revitalise the attractiveness of the destination. Briefly, such differences are another piece of evidence indicating that cross-cultural differences in managerial practices could hinder the successful implementation of benchmarking research findings which a different political system could easily accomplish.

This study provides some evidence that, as a significant part of local culture, hospitality and harassment could not be considered as an external benchmarking element or good practices although one destination is found to be better than another; but several solutions may exist to improve these elements in an internal benchmarking process. This perception may be the outcome of cultural differences between the tourists' own country and destinations visited. In this study, Turkey was perceived to be more hospitable. Although this could be a strong point for tourism in Mallorca, too, it is a delicate matter to suggest to local people in Mallorca that they embrace Turkey's tradition of hospitality or visit Turkey to see how tourists are welcomed there. It is a part of Turkish culture to accept tourists as guests. Interestingly, on the other hand, harassment is a major problem in Turkey while no complaint was registered in Mallorca. There could be many reasons for this result, e.g. the socio-economic and socio-demographic characteristics of those people in Turkey and so on.

One could also point out the existence of other traditional cultural values. For instance, bargaining is one of the national trading habits in Turkey whereas shopkeepers in Mallorca seem to be rather reluctant to reduce prices for shoppers. In terms of the availability of either local or familiar food, the Mallorcan cuisine is much closer to its markets' taste such as offering customers dishes with pork, but the Turkish cuisine is limited partly due to cultural reasons. A further example could be given from the availability of condom machines located in certain parts of resorts in Mallorca. The culture in Turkey is not ready to accept this yet. Briefly,

any best practice which is efficiently working in one place or is found to be useful for its customers may not easily be transferred to another place if it is culture-oriented.

A further point concerns differences in the level of language communication between destinations. This attribute seems to have a partial limitation in external destination benchmarking because Mallorca is a more mature destination with a high level of repeat visit customers, many British and German citizens living on the island and some tourism businesses run by British or German citizens. Moreover, as a consequence of the university students' exchange program called 'Erasmus' and established only in EU member countries, students are able to study in other countries such as Germany or Britain. This enables them to improve their foreign language skills and could ease communication with foreign tourists visiting the island. As long as Mallorca and Turkey are the sample destinations, it is less likely to suggest one destination to choose another as the partner in this respect. However, other services in respect of the improvement of brochures, maps and catalogues in the relevant languages and tourist information centres could be the subject of good practices and of further research in destination benchmarking.

Tourism contributes much more to Mallorca's national economy than it does to Turkey's. Tourism contributes about 35% of GNP in Mallorca compared to only 4% in Turkey (internal performance). As a measure of external performance, the proportion of Turkey's share in Mediterranean and international tourism is greater than Mallorca's both in terms of the volume of tourist arrivals and tourism incomes. Although it appears that Turkey is stronger than Mallorca, in fact, Mallorca must be regarded as a stronger destination since it is much smaller than Turkey in terms of both economic and geographic indicators. Turkey has a diversified economy while the Mallorcan economy has concentrated heavily on income from tourism. These findings confirm that such quantitative measures could be measurable and compatible, but may not be useful for comparison (benchmarking) with those of other destinations, as for a variety of economic and geographic reasons, they vary

from one destination to another. Does the destination with a greater proportion of tourism income operate more efficiently and effectively than another with a lower proportion? Similarly, does the destination with more accommodation or blue flags operate much better than another with fewer? All these discrepancies might also be related to differences in the size of beaches or the land available for tourism activities or government policies to encourage the development of accommodation stock between two independent destinations.

It is easy to see diversity in the distribution of the scale of accommodation establishments between destinations. For example, Turkey is encouraging the construction of large-scale hotels and holiday complexes in the coastal resorts whereas Mallorca has given priority to higher quality small- and medium-sized hotels and apartments by demolishing old large hotel buildings. Grading schemes classify holiday accommodation in order of quality. Such differences on the supply side as well as differences in the type of holidays taken on the demand side (e.g. self-catering versus half-board or full-board) might influence the quality of tourist experiences according to the level of their holiday. This could result both in different degrees of satisfaction depending on the quality of accommodation and in the differences in spending between a group who stay in a holiday village and another who stay in a self-catering apartment.

In respect of economic measures, the level of prices is not an independent variable controlled solely by destination authorities or tourism organisations. There is a close relationship between changes in exchange rates and changes in the level of prices. In other words, positive or negative changes in the exchange rate of one country against another, tourist generating, country or fluctuations in inflation rates may lead to changes in the prices tourists have to pay (Icoz and Kozak 1998). As a result, some countries become more expensive (e.g. Mallorca) while others are relatively cheaper in the eyes of potential or actual tourists (e.g. Turkey). Benchmarking the level of prices is totally dependent on the level of gaps in economic measures between tourist-generating countries and tourist destinations rather than

between two international destinations. One could speculate that such economic indicators are compatible, but not comparable measures which could be used in an external destination benchmarking study.

The results of this study suggest that while Turkey has diversified cultural and natural attractions Mallorca can only offer a limited choice. This is confirmed by the tourist motivation survey. The differentiating personal motivators in Turkey were culture and nature. The differentiating destination attributes for Turkey were the level of prices/costs, people and culture, and scenery and landscape. The study did not indicate any personal motivators that would enable Mallorca to differentiate itself from Turkey. The differentiating destination attributes for Mallorca were being family-oriented, availability of sea/beaches, availability and suitability of nightlife/entertainment and the relatively shorter flight time compared to Turkey. These findings also support earlier studies saying that some people prefer to visit destinations where culture and infrastructure are familiar or similar to those of their own country, e.g. Mallorca. However, others prefer to visit other destinations which are different in these respects, e.g. Turkey (Cohen 1972; Mao, Howard and Havitz 1993). These are other differences between two destinations in the context of attractiveness.

In comparison with those in Turkey, British tourists in Mallorca made a higher number of repeat visits, were more likely to choose half-board and self-catering accommodation establishments and a holiday of less than two weeks or book their holidays more than seven months in advance, pay more for package tours, have higher annual incomes and a higher proportion of companions both over 15 years old and children. In comparison with German tourists in Turkey, those in Mallorca were less likely to book all-inclusive holidays, stay in holiday villages and book their holidays over four months ahead, but more likely to stay less than two weeks and to represent lower income and age groups. Such differences on the demand side might suggest further implications for destination benchmarking. It seems difficult to gauge the extent to which such differences in the profiles of customers affect research results.

These arguments provide grounds to suggest that some qualitative and quantitative measures may be evaluated as a good example of internal benchmarking rather than of external benchmarking considering a comparison activity between peer destinations. As a consequence of the differences mentioned above, one could suggest that some variables relating to social, economic or political issues could be measurable, compatible but might not be used for benchmarking against other destinations, e.g. level of prices, hospitality or harassment, language communication or formal regulations such as visa or passport control. The concept of destination benchmarking seems to be closer to the involvement of facilities relating to sport, beach, airport, transport, accommodation, food and drink, child care, signposting and tourist information centres (physical aspects of quality). In other words, the performance of such facilities could be measurable, compatible and also comparable for benchmarking against those of other destinations.

10.1.5. Contributions to the Benchmarking Literature

In the light of the destination benchmarking model proposed and tested in earlier chapters, this study provides useful theoretical implications for the literature on benchmarking, destination management and competitiveness. The following discussion is based upon the measurement of destination performance, types of destination benchmarking and taking action, which are the three elements of the proposed model.

10.1.5.1. Measurement of the Destination Performance

This section encompasses the discussion of the development and assessment of qualitative and quantitative measures used to measure the performance of tourist destinations as a first stage of the proposed destination benchmarking model. In an attempt to develop and test a variety of destination-specific quantitative and qualitative measures for the benefit of benchmarking, both primary and secondary data

were collected and assessed using various research methods. Quantitative measures comprised the assessment of tourist arrivals and their distribution by nationalities and months, average length of stay, annual tourist incomes, number of repeat visits, and tourist expenditure and its distribution into sub-categories. Qualitative measures included the assessment of tourist motivations, satisfaction, comments, complaints and the intention of repeat business and recommendation.

The number of tourist arrivals evaluates if there is any difference compared to past years and shows the proportion of tourist arrivals to a destination out of international tourist arrivals. The number of repeat tourists is the indicator of the proportion of repeat tourists and how frequent they are. The amount of tourism receipts refers to the proportion of national tourism revenues gained from international tourism and GNP. Developments are observed on the basis of comparison to the indicators of past years. The level of expenditures helps to illustrate the profile of tourists visiting the destination and the factors affecting their total expenditure. The length of stays helps to examine the profile of tourists in terms of the length of their stay at the destination and if there is any difference in the amount of expenditure between tourists in different categories of length of stay.

The assessment of motivations indicates why a specific destination is chosen for holiday and whether there are any differences between destinations on the basis of these factors. The level of tourist satisfaction is helpful to indicate the performance of destinations or their specific elements from the points of actual tourists' own experiences and which one destination is likely to perform better than others. The analysis of tourist complaints and comments is useful to identify the type of attributes with which customers expect improvement, with or without comparison to other destinations. Feedback received from repeat tourists is used to evaluate how the destination has performed compared with past years and in what respects. The level of intention to come back or recommend is a measure to indicate how likely tourists are to revisit and recommend the destination in the future, based on the level of their satisfaction with it.

The findings of this study confirm that there is no practical difficulty in employing quantitative measures as tools for benchmarking destinations. It is known that such measures consist of scales such as interval and ratio which have a fixed origin or zero point. The measurement of destination performance with quantitative measures is easier than with qualitative measures. Assume that one tourist spent £1000 and another only half as much, at £500. Such scores are open to comparison analysis, e.g. comparing the volume of tourism receipts to previous years or to total international tourism figures.

This type of analysis showed the significance of tourism revenues in the national economy as a measure of internal performance, and in Mediterranean and international tourism as a measure of external performance. It is better to see if there is any improvement in the share of target values such as GNP, international tourism incomes or tourist arrivals rather than changes in the figures themselves. Many researchers make the mistake of thinking that the tourism industry is significantly improving or that the country earns a good deal from the tourism industry if any figure increases in comparison to previous years. As this study indicated, there may sometimes be an inconsistent relationship between changes in the number of tourist arrivals or in the amount of tourism incomes and changes in the share of Mediterranean or international tourism. The first may increase while the second remains constant or decreases. The application of some quantitative measures in external benchmarking between peer destinations was also limited in this study due to economic and geographical factors.

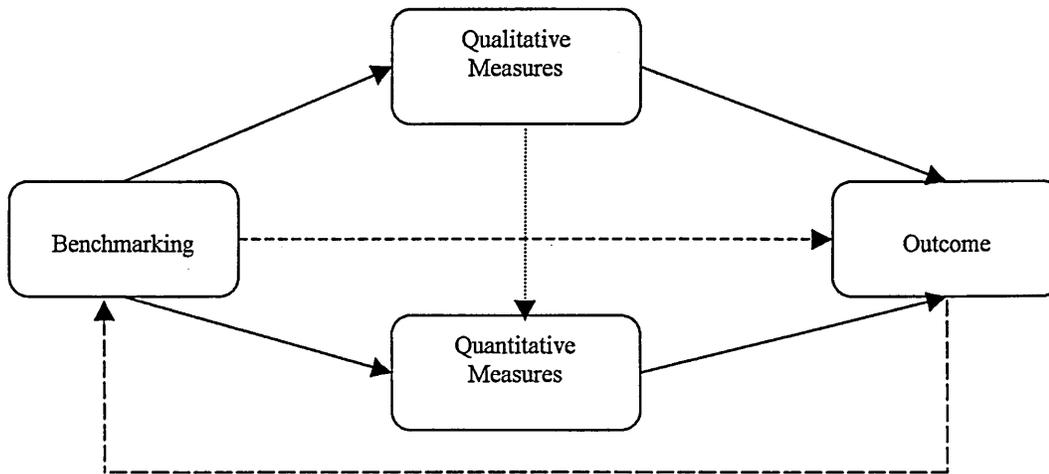
As widely emphasised in the literature (Deming 1982; Peters 1994; Zairi 1996), some other criteria such as customer satisfaction or customer feedback may be more difficult to measure and set standard values, but play a pivotal role not only in identifying the current but also in designing future performance and highlighting where there is a need for further improvement. According to customers, the performance level of destinations is based on mostly qualitative measures, e.g. the extent to which it provides a satisfactory service or it has a favourable image in the

market (Morrison 1989; Um and Crompton 1990). These measures may then be used to make a comparison between destinations to determine which one performs in any particular area better than others. The outcome of this assessment could be effective on their future behaviour of returning or recommending. Customers may not be interested in some aspects of the quantitative performance of destinations such as the number of tourists visiting per annum, the amount of tourism income received or the number of hotels or restaurants. These are the areas which destination authorities are responsible for improving both in quantity and quality. Such quantitative performance of destinations is measured using a timeframe of several years depending upon the availability of data.

Based upon the type of measures used and the results obtained in this research, Figure 10.1 presents the role of qualitative and quantitative measures in destination benchmarking. Benchmarking is a cumulative assessment of the overall destination performance as one measure is strongly related to another. Along with the findings of past (Edgett and Snow 1996) and this current research, this study suggests that the use of multiple measures is more effective than that of single measures for analysing the in-depth performance of destinations. The assessment of performance on the basis of several measures can help to decide whether there is a need to conduct any type of benchmarking. For instance, the assessment of motivations as qualitative measures is vital because further action can be taken by looking into what tourists consider important in visiting a destination and other destinations can be selected on the basis of the examination of similarities or differences in the demand and supply sides. Moreover, improvements in qualitative measures are sometimes expected to stimulate developments in quantitative measures as outcomes. As this study confirmed, there may be a close relationship between various qualitative (e.g. tourist satisfaction) and quantitative measures (e.g. tourist expenses). When tourists are satisfied, they tend to spend more, recommend their holidays or want to return. This probably increases the number of tourists in the following years and may also increase the total income from tourism. After implementing good practices and taking action for improvement, if there is still no suffi-

cient development in outcomes (e.g. tourist arrivals, image or tourism income), this means that the benchmarking project has failed and a new one might be needed.

Figure 10.1. Role of Qualitative and Quantitative Measures in Destination Benchmarking



In summary, reflecting back to the discussion of hypotheses, all these measures were able to demonstrate both similarities and differences not only between the sample tourist groups but also between the sample destinations. It is further suggested that some forms of quantitative measures (e.g. tourist arrivals, tourism revenues and level of prices) and some 'soft' areas relating to qualitative measures (e.g. hospitality or attitude, language communication, visa and passport control services) could not be rationale for external benchmarking due to economic, political, geographical and cultural reasons although they are measurable, comparable and compatible. Perhaps this could provide a piece of evidence to partially support Zairi's (1994) statement suggesting that benchmarking is a method to point out whether the organisation (or the destination) is competitive rather than to improve its performance based on the information obtained from others.

10.1.5.2. Assessing the Destination Benchmarking Process

This section is devoted to the discussion of the practical procedures of internal and external destination benchmarking and the potential methods, which can be used to

collect and analyse data and present the benchmarking findings, in comparison to earlier studies in the field of benchmarking.

The findings of the proposed model, as a type of internal benchmarking, could make a contribution to exploring and understanding a destination's performance without comparing it with other destinations. In comparison with the earlier benchmarking studies, although there is no difference for measuring the internal performance of destinations when using quantitative measures, it differs when using qualitative measures. As quantitative measures are metric values, they can either be compared to the indicators of previous years or those of other destinations (Zairi 1998). This indicates whether there has been any improvement. However, the most common benchmarking approach is relatively simple when analysing qualitative measures. It reports only mean scores for each item on both perceptions of two organisations or destinations (Breiter and Kliner 1995; Edgett and Snow 1996; Min and Min 1997; Thomason *et al.* 1999a, 1999b). Conclusions are drawn by simply comparing the two sets of mean scores and their rankings (gap analysis).

The model tested in this study, depending on the empirical findings, differs from those proposed by earlier research projects which claimed just to establish gaps in numeric values between the two organisations, but not to indicate if customers would be likely to return (Zhao *et al.* 1995; Balm 1996; Min and Min 1997; Zairi 1998; Thomason *et al.* 1999a). The analysis of intention to recommend and revisit are likely to show the strongest as well as the weakest attributes in a destination; in other words, the attributes to which attention should be paid as a part of an internal benchmarking study. This study therefore proposes that internal qualitative measurement of tourist destinations needs to consider how outcomes would influence the overall satisfaction and future intention of such destinations' own customers. This implication also applies to building a theoretical structure for organisation benchmarking. One major criticism of benchmarking is that it avoids the creative thinking of decision-makers (McNair and Leibfried 1992; Karlof and Ostblom 1993). This limitation could be overcome by focusing on the internal performance

of destinations based on the findings of qualitative measures and their assessment with advanced research tools or content analysis identified in this study.

Given an example from the findings of both internal and external benchmarking studies, the level of facilities and services at the resort airport and language communication in German were found to be the attributes needing improvement in Turkey. As both benchmarking studies are consistent, it is clear that these attributes need to be improved through benchmarking. Taking the resort airport in Turkey on board for further examination, observations show that it does not meet the customers' needs as it is a small airport and check-in and check-out services can sometimes be very slow. If internal benchmarking research is conducted, the airport management could take the necessary action by obtaining feedback through its staff members and passengers. There might be no need to visit another resort airport to monitor what they have achieved in this matter. One possible method could be softening the formal regulations to ease the arrival and departure of those foreign tourists visiting the destination. Or if the feedback from tourists is alarm that the destination is becoming overcommercialised or losing its cultural charm, then it might need to return to its normal life.

Previous benchmarking studies had paid insufficient attention to the assessment of repeat customers' opinions while attempting to measure the perceived changes in the performance of destinations when compared to previous visits. As an element of internal benchmarking, destinations could focus their efforts on gaining feedback from repeat tourists in respect of changes within the destination itself. This study proposes that the repeat tourists' opinions about the developments in the facilities and services of destinations would be worth obtaining for destination benchmarking to maintain a continuous progress. As a greater number of tourists return to Mallorca, it is important to get feedback from its repeat customers periodically concerning any potential changes in the destination overall as well as to get feedback from the first-time tourists. Improvements to the attractions, facilities and services at the destination could stimulate further repeat visits as well as future

potential tourists, but any perceived negative trends could prevent the destination from becoming more competitive. However, as previously described (Mansfeld 1992; Ross 1993; Beeho and Prentice 1997; Klenosky and Gitelson 1998; Chan 1998), the perspective of first-time tourists is also important due to the importance of word-of-mouth communication.

The application of external benchmarking, with few exceptions (e.g. New and Szejczewski 1995; Boger *et al.* 1999; Meyer *et al.* 1999), generally lacks the use of statistical tools such as t-, chi-square and analysis of variance tests particularly while measuring the qualitative performance of samples observed and employing structured questionnaires. There may be no need to use statistical tools for the assessment of some quantitative measures, but it is necessary to do so for qualitative measures when a large sample population is involved in the study. Unlike most of the earlier benchmarking studies, this research suggests that using statistical methods could be more valuable than self-selected methods, where simple mean values of organisation A are plotted against those of organisation B on a chart. There may be some gaps, but it is difficult to perceive how significant and how large they are. In overcoming this problem, this study used a series of independent t-tests to investigate if the findings were statistically significant between two destinations and between two nationalities. If so, the result (or the gap) will either be positive or negative. Attributes with larger t-values result in larger gaps than those with smaller mean values in terms of mean scores. This type of analysis also helps to concentrate on those attributes with larger or smaller t-values, depending upon the future objectives. Alternatively, there could be no need to carry out a similar type of statistical analysis when questions lead to direct comparison of performance on the basis of feedback received from tourists visiting both sample destinations (Q 2).

The basic idea behind the benchmarking concept is to identify gaps in performance and close them by monitoring other organisations to get ideas about how they perform and achieve their targets. This refers to what 'process' benchmarking aims to achieve (Watson 1993). If the objective is to investigate the strengths and weak-

nesses of one particular destination or differences between two destinations, in the case of external benchmarking, then it would be necessary to observe those attributes with higher or lower satisfaction levels in order to test if such differences really exist and explore the reason why. Lack of time limited this study to a few hotels, apartments, cafes and restaurants in each case. This stage concentrated on monitoring the sample destination airports, road and traffic conditions, accessibility, cleanliness, sea and beaches, tourist attractions and the attitudes of local people. Personal observations worked fairly well and made it possible to present the likely reasons for the performance gaps between the two destinations, e.g. level of prices, the destination airport, local transport services and facilities for children.

Personal observations preclude the need for lengthy reports. To extend their use, reverse engineering could be applied as in past studies of organisation benchmarking. A group of representatives from holiday resorts would travel as customers to unfamiliar destinations to analyse how they are doing and concentrate on particular aspects of the destinations. Thus, personal observations or site visits, as a significant tool of external benchmarking, might be helpful to identify good practice exemplars in other destinations and apply them to the host destination subject to revision if required. This study indicated the existence of several good practices in the Mallorcan resorts which could be copied by their Turkish counterparts without any major modification, e.g. the picture of a dish with its price, kids' clubs and playground in individual restaurants, menu with half-price for kids under 12 years old, blue flags and their effective application in practice such as good and frequent signposting on beaches, facilities specifically designed for disable people, and leaflets about a variety of attractions and events written in various languages.

In external benchmarking, it is significant to see if there is any difference in the characteristics of the sample population visiting destinations. This type of assessment is helpful for identifying not only the profile of market segments but also partner destinations with which external benchmarking is to be conducted. Such an attempt could be significant for destination benchmarking research in order to have

a better understanding of competitors involved in the same set in terms of a particular market and make a decision about whom and what to benchmark. For instance, the sample destinations could select their benchmarking partners from countries in the Mediterranean basin because the majority of tourists visiting Mallorca and Turkey tend to take their holidays around this region, according to the findings of this research.

Another point to be taken into account in destination benchmarking research is that tourist destinations attract customers from different cultures and countries; therefore it is not reasonable to examine the variables of only one group of customers and take action in line with the feedback. Those who come from other main generating countries should also be included in this type of analysis. This study confirmed the existence of differences in tourists' motivation, satisfaction, expenditure and the number of previous visits between the British and German tourists. For example, the level of the spoken and written language at the destination may be very good for one group, but it may not seem so to those who speak another language. This study therefore suggests undertaking a separate benchmarking exercise for each national group. This type of analysis may assist destination authorities to establish the positioning strategies and explore their core competencies for each group. It may also assist in investigating reasons for differences between customer groups and enabling to establish effective strategies for improvement.

The measurement of one's own performance indicates its current strengths and weaknesses as well as opportunities and threats for the future. Their comparison to other similar destinations may identify how competitive the destination is in various areas and any possible areas needing improvement. These terms could be refined to suit destinations. Strengths refer to items the destination is good at, or something that makes a significant contribution to delivering tourist satisfaction and repeat business; weaknesses are items the destination lacks or something that causes tourist dissatisfaction and may prevent repeat or potential tourists' visits; opportunities are potential elements at the destination that could lead to tourist satisfaction

and repeat business in the future, if developed effectively; threats are potential disruptions that will possibly impact upon tourist satisfaction and demand in the future. Based upon these criteria, the application of the proposed destination-benchmarking methodology identified several key issues for drawing a clear picture of Mallorca and Turkey as summer holiday destinations, of which some details are given in Table 10.5. This table is the summary of what a benchmarking study aims at or is expected to provide. Producing a similar kind of table after completion of the main part of benchmarking (preparation and analysis), destination managers could continue to proceed with the next stage, which is taking action.

10.1.5.3. Taking Action

Having learnt from the data and knowledge during the benchmarking process, this is the next stage in order to set goals for improvement and develop action plans. In this stage, the results of the benchmarking study can be reported to the people it affects or to whom it concerns, e.g. local authorities, airport management, tourism and travel businesses and associations, and local residents. Although the objective of benchmarking is to change either the structure of the organisation or some of its operations in a way that increases its performance, it is not reasonable to expect destination managers to suggest their members change all their products or the style of services or practices they offer where any customer dissatisfaction may result or where destination benchmarking research gives negative scores; but they could show ways (as discussed in the section of practical implications later) in which to improve those areas which bring higher tourist satisfaction and competitive advantage.

A list of goals is provided in Table 10.6. To achieve any of these or similar goals, the following issues could be taken into account both from the supply and demand side while formulating a benchmarking project and taking action afterwards. It is also a fact that there is no need for a destination to benchmark itself if it is content with its position or has no wish to earn more from tourism.

Table 10.5. SWOT Analysis for Mallorca and Turkey

	Mallorca		Turkey	
	British	German	British	German
STRENGTHS	<ul style="list-style-type: none"> ◆ Sea, sun and sand ◆ Nature ◆ Frequent loyalty ◆ Hospitality ◆ Level of language communication ◆ Cater for families ◆ High level of trip satisfaction ◆ High level of intention to come back and recommend ◆ Attractive in winter season ◆ Good airport facilities 	<ul style="list-style-type: none"> ◆ Sea, sun and sand ◆ Nature ◆ Level of language communication ◆ Frequent loyalty ◆ High level of trip satisfaction ◆ High level of intention to come back and recommend ◆ Attractive in winter season ◆ Good airport facilities ◆ Cater for families 	<ul style="list-style-type: none"> ◆ Sea, sun and sand ◆ Culture, nature and history ◆ Hospitality ◆ Level of prices ◆ Good value for money ◆ Level of language communication ◆ Local transport services ◆ New accommodation ◆ High level of trip satisfaction ◆ High level of intention to come back and recommend 	<ul style="list-style-type: none"> ◆ Sea, sun and sand ◆ Culture, nature and history ◆ Accommodation services ◆ Local transport services ◆ Level of prices ◆ Cleanliness and hygiene ◆ High level of trip satisfaction ◆ High intention to come back and recommend ◆ Frequent loyalty
WEAKNESSES	<ul style="list-style-type: none"> ◆ Old accommodation ◆ High level of prices ◆ Poor cleanliness ◆ Negative attitude of shopkeepers 	<ul style="list-style-type: none"> ◆ Poor sports facilities and activities ◆ Poor quality of accommodation ◆ Poor food ◆ High level of prices ◆ Lack of cleanliness 	<ul style="list-style-type: none"> ◆ Harassment ◆ Lack of cleanliness ◆ Poor signposting ◆ Poor airport facilities and services ◆ Poor air-conditioning 	<ul style="list-style-type: none"> ◆ Harassment ◆ Poor language communication ◆ Lack of cleanliness ◆ Poor signposting ◆ Poor air-conditioning
OPPORTUNITIES	<ul style="list-style-type: none"> ◆ Level of prices ◆ Repositioning and improvement of resorts ◆ A brand-new airport ◆ Attractive in winter season ◆ Shorter flight ◆ Special programs for people who return 	<ul style="list-style-type: none"> ◆ Repositioning and improvement of resorts ◆ Attractive in winter season ◆ A brand-new airport ◆ Shorter flight ◆ Special programs for people who return 	<ul style="list-style-type: none"> ◆ Young destination 	<ul style="list-style-type: none"> ◆ Young destination
THREATS	<ul style="list-style-type: none"> ◆ Commercialisation and overdevelopment ◆ Noise ◆ Mixture of family and young individual tourists ◆ Heavily dependent on British market 	<ul style="list-style-type: none"> ◆ Level of prices ◆ Quality of accommodation ◆ Overcommercialisation & overdevelopment ◆ Heavily dependent on German market 	<ul style="list-style-type: none"> ◆ Harassment ◆ Overcommercialisation & overdevelopment ◆ Poor cleanliness of sea and beaches ◆ Poor hygiene and sanitation ◆ Poor road and traffic conditions 	<ul style="list-style-type: none"> ◆ Harassment ◆ Overcommercialisation & overdevelopment ◆ Dependent on German market
COMPETITIVENESS	<ul style="list-style-type: none"> ◆ Easy access to the market (shorter flight time) ◆ Caters for families ◆ Variety of leisure facilities and activities ◆ Relaxed atmosphere (no hassle) ◆ A brand-new airport ◆ Mature (experienced) destination ◆ Attractive for winter tourism 	<ul style="list-style-type: none"> ◆ Easy access to the market (shorter flight time) ◆ Caters for families ◆ A brand-new airport ◆ Relaxed atmosphere (no hassle) ◆ Mature and experienced destination ◆ Attractive for winter tourism 	<ul style="list-style-type: none"> ◆ Culture and history ◆ Hospitality ◆ Level of prices (Good value for money) ◆ Local transport services ◆ Young destination ◆ Good shopping possibilities 	<ul style="list-style-type: none"> ◆ Culture and history ◆ Hospitality ◆ Level of prices (Good value for money) ◆ Accommodation services ◆ Variety of watersport activities ◆ Young destination

Table 10.6. Goals in Destination Benchmarking

Perspectives	Goals
Customer Perspective	<ul style="list-style-type: none"> ◆ Increase customer satisfaction ◆ Decrease customer complaints ◆ Increase customer compliments ◆ Increase the share of repeat customers ◆ Attract new customers
Internal Businesses	<ul style="list-style-type: none"> ◆ Identify and promote core competencies ◆ Deliver a better quality service ◆ Facilitate an effective relationship among local businesses
Innovation and Learning	<ul style="list-style-type: none"> ◆ Introduce new products ◆ Revise destination positioning ◆ Provide continuous improvement ◆ Search for good practices in other destinations or elsewhere
Financial Perspective	<ul style="list-style-type: none"> ◆ Deliver a competitive price ◆ Deliver better value for money ◆ Increase revenue per tourist/group ◆ Increase average occupancy rates ◆ Increase total tourism receipts

Source: Adapted from Kaplan and Norton 1993: 135.

While setting goals and establishing action plans, destination management can benefit from the findings of either internal or external benchmarking exercises depending upon which one has been followed. In the case of external benchmarking, methods used by other destinations and thought to be rational and applicable to one's own purposes can be considered. Attention needs to be paid to the factors that affect the success of practices and the overall performance of benchmarking studies, e.g. cultural differences between tourist-receiving and tourist generating countries, and between different tourist-receiving countries. Types of customers visiting different destinations, the power of marketing channels and their restructuring, and differences in laws and legislation between tourist receiving countries are also the subject of benchmarking research between destinations. This study demonstrated that there are differences in managerial practices and services between destinations although they take place in the same competitiveness set in terms of the market structure and tourism products on offer.

This study confirmed that there are different dimensions related to both tangible and intangible aspects of destinations. For instance, intangible aspects include the quality of facilities, the attitude of local people towards tourists and a sense of per-

sonal safety. As success will depend on delivering the right mix of components to meet customer demand, a destination benchmarking programme needs to involve consideration of all facilities and services which affect the tourist experience. This points to the importance of the implementation of a destination-based TQM programme providing a means of co-operative decision making, collaboration and communication between a set of organisations such as local and central government, private industry and the related international organisations (Goodall and Bergsa 1990; Inskeep 1991; Hall 1994; Gunn 1997; Timothy 1998). This is one of the major roles given to the destination management, which could be led by a 'destination manager'. The benefits of such co-operation would be avoiding wasting financial resources, providing better communication channels to set plans, making decisions and putting them into practice. For instance, being aware of its advantages, the Balearic Islands government has recently begun to pay attention to the protection of natural resources and to upgrade and enhance the national heritage by developing an integrated approach involving collaboration between public and private sector representatives.

Referring to the findings of this research, some items are not related to only one specific resort in Turkey or Mallorca, but could have been a reflection of tourists' multiple experiences in the country. For instance, Mallorca has only one international airport where nearly 15 million passengers are served annually. Any tourist who would like to visit another resort on their next trip to Mallorca would have to use the same airport. Similarly, resorts are connected to each other by local transport services. A good network of public transport services will enable both tourists and local people to have access to other resorts and main tourist attractions. In terms of hospitality, local people in Turkey usually welcome foreign tourists in a friendly and warm manner. These statements emphasise the importance of a strong collaboration and co-operation between local units, units of other resorts and national institutions within a country in order to implement the findings of benchmarking.

Representatives of the local community could be another group to take part in a proposed destination-based benchmarking study while taking action for improvement due to a high level of cross-cultural interaction and communication in tourism between hosts and guests, e.g. actual behaviour towards tourists. They are the people whose quality of life is influenced by the consequences of tourism development within the area, e.g. air pollution, traffic congestion and overcommercialisation (Gunn 1997). As far as mass tourism is concerned, tour operators or their local representatives could also take part in such co-operative and collaborative work to encourage local tourism businesses to improve the standards of their services and facilities. Some evidence can be seen in the tourism development of Mallorca where financial contribution and guidelines are provided by foreign tour operators such as TUI and Thomson to improve the quality of facilities and services. Similarly, airport management in Palma has collaborated with tour operators (e.g. TUI and NUR) to better serve passengers visiting Mallorca in the high-peak season by promoting staggered arrivals and departures.

Although further possible strategies, which could be applicable while taking action, are given for each aspect of qualitative and quantitative measures in the section of practical implications, it is worth presenting in this section a brief overview of strategies for marketing and improvement of performance levels at the destination.

As far as marketing strategies are concerned (marketing management), it might be possible to keep the attention of repeat tourists or attain new tourists, promote holidays with self-catering and bed and breakfast, attract those travelling alone or with less companions and those taking shorter holidays. Focusing Porter's (1996) variety-based positioning strategy, specific products and services differentiating one destination from others could be focused. The level of prices can be reduced to attract tourists in off-season period. In line with Porter's (1996) 'needs-based positioning strategy', a particular segment of customers might be targeted, e.g. family groups in Alcudia and young independent tourists in Arenal in Mallorca (or the use of homogeneous market segmentation strategy, Fornell 1992). Or new products

can be developed, as Mallorca and Turkey currently do, e.g. improvement of sports and recreation activities.

In terms of improving the quality of products or services (performance management), several strategies can be set up. For instance, in increasing the standard of hygiene, sanitation and cleanliness, an effective code of practice may be established to encourage both customers and service providers to become environmentally-friendly and sensitive towards others' health. Eco-label systems or their variants, as part of a generic destination benchmarking exercise, can be helpful on this matter. Training programmes can be instigated amongst staff and shopkeepers to encourage them to behave towards tourists in a friendly manner and to be keen to listen to their complaints. These may then require revising the existing laws, regulations and practices and upgrading the tourist infrastructure, as enablers of performance improvement through destination benchmarking.

In summary, the stage of taking action is possibly one of the most difficult parts of the benchmarking process, as local authorities, tourism organisations and businesses may not intend to implement findings or to take long-term decisions. This may be due to lack of human or financial resources and the sensitivity of the tourism industry to economic, political and social changes. The establishment of action plans may also be influenced by cross-cultural differences in managerial practices, beliefs and values between peer destinations in the case of external benchmarking. This issue also applies to the consideration of cross-cultural differences between tourist groups in the case of either internal or external benchmarking.

10.2. Features of Destination Benchmarking

This study considers two categories of benchmarking in terms of their applications: organisation benchmarking and destination benchmarking. The former deals with the performance evaluation of only a particular organisation and its departments. In contrast, the latter draws a broader picture including all elements of one desti-

nation such as transport services, airport services, accommodation services, leisure and sport facilities, hospitality and local attitudes, hygiene and cleanliness, and so on. Depending upon the analysis of the structure of past benchmarking research, the findings of this study, and the underlying features of tourist destinations described earlier, the main differences between organisation benchmarking and destination benchmarking could be identified.

First, destination benchmarking does not yet need to establish legal agreements between hosts and partners. It is a new concept and is insufficiently developed. There would be no need to get permission for using available quantitative or qualitative data from other destinations. Data such as occupancy rates, number of tourists, tourist revenues and tourists' complaints about the destination may be in the public domain. Nevertheless, confidentiality can make it difficult for businesses to obtain useful data about partners (Camp 1989; Watson 1993; Cook 1995). In destination benchmarking, tour operators or travel agents may also participate in sharing their experiences in other destinations. In future the destination benchmarking process may be carried out more formally. If the application of this model is extended within the tourism industry and demand for it increases, there may be grounds for establishing legal agreements.

Next, destination benchmarking is wider in scope than organisation benchmarking due to its multi-dimensional, heterogeneous and inter-related (multi-related) features. In other words, many organisations are involved in delivering destination performance. In some organisations, customers do not have direct access to the location where goods and services are produced or provided; they can purchase goods and services from retailers. In some cases, they may have experience with only a few attributes provided by businesses. For example, customers can conduct all the business relating to their bank account without speaking to any of the bank staff. They can just use the automatic bank teller machines or their own computers to complete the process. The significant point here is the overall image of the business among its customers and the efficiency of the machines. Such marketing dif-

ferences emphasise the importance of geographical and cultural distance between supply and demand, between destinations and between tourists as being factors influencing the investigation of the operation of destination benchmarking.

10.3. Practical Implications

This section of the research discusses the practical implications based upon the socio-economic and socio-demographic profiles of the sample population and testing of the proposed qualitative and quantitative measures. Possible recommendations for taking action is also provided, where needed.

10.3.1. Overview of Profiles of Sample Population

As emphasised earlier in the third and fourth hypotheses, the analysis of sample profiles of respondents revealed the existence of considerable differences between tourists who were from the same country and visiting two different destinations and between tourists who were from different countries and visiting the same destination on the basis of several independent variables. These findings provide significant practical implications for establishing further marketing strategies on the basis of the consideration of similarities or differences between British and German tourists and between Mallorca and Turkey.

10.3.2. Overview of Quantitative Measures

10.3.2.1. Number of Repeat Visits

Returning tourists are loyal to Mallorca and Turkey, whereas first-time tourists were more likely to travel elsewhere once they had visited either country for the first time. Mallorca possesses more loyal customers than Turkey. Some tourists had a loyalty not only to Mallorca in general but also to particular resorts. This

finding parallels that of previous research carried out by Gyte and Phelps (1989). There could be some tourists who are drawn to one particular destination. One customer mentioned that "I came to Mallorca 30 years ago as a 20 year old and have continued to come as a married man and father... If I win the lottery, I would live here". Obviously, the more mature a destination, the more repeat tourists it has and the more intention its customers have to return in the future.

Marketing literature considers the level of repeat visits as one of the market segmentation criteria (Heath and Wall 1992). As the examination of the results of respondents' willingness to revisit Mallorca and Turkey in the future indicates, neither sample destinations seems to have any major problem with their *destination adopters* (those who consider revisiting in the future). Mallorca and Turkey should therefore establish effective marketing strategies to sustain the interests of those who intend to continue their visits. As is widely known, the cost of marketing activities for attracting repeat tourists is much less than for those who are potential tourists (Fornell 1992).

Looking at these findings, one could suggest that British and German tourists still find Mallorca very attractive. Nevertheless, the high level of repeat visits is not a panacea, since it may not necessarily offer the destination a competitive advantage over similar destinations. In other words, repeat visits can be a problem as well as a strength. Mallorca attaches itself to Plog's (1974) *psychocentric* tourist typology by attracting mass market repeat tourists with their low level of income and tendency largely to prefer package tours. In his conceptual approach, Oppermann (1998, 1999) claims that destination authorities do not need to worry about the density of repeat visits until its ratio exceeds the point between half and three quarters of total tourist numbers from the same market, but it would be better to concentrate its efforts on attracting new market segments either from the same or a different country. Mountinho and Trimble (1991) suggest that authorities should set different marketing strategies appropriate to each segment of the first-time and repeat tourist market.

In response to Mallorca's difficulty in balancing its first-time and high level of repeat customers between both British and German markets, the tourist authority has recently decided to focus on attracting tourism demand from Poland and Russia as emerging potential tourist markets. This shows that tourism organisations in Mallorca aim to move from a defensive marketing strategy (maximising customer retention) to an offensive marketing strategy (attaining new customers). In terms of the volume of repeat visits, research findings did not signal any alarm for the tourism industry in Turkey, but Mallorca could be a worthwhile benchmark for tourism development in Turkey while a decision is being made about what to do or not to do next.

10.3.2.2. Analysis of Tourist Expenditure

This section attempted to measure the total contribution of tourist expenditure to the local economy and is based on several sub-categories. It appears that there are differences between the two destinations in the amount that tourists spend on different sub-categories. For instance, tourists in Turkey spent more on clothes than those in Mallorca just as those in Mallorca spent more on daily tours and rent-a-car services than those in Turkey. There are certainly various supply and demand-based reasons for this result. Although it is the responsibility of process benchmarking to investigate these factors, this study has suggested the possible effect of several factors such as the type of holiday or the number of people in the party. This part of destination benchmarking has great potential for further development.

The level of total spending on food and beverages in Mallorca is higher than in Turkey. The reason could be that those in Mallorca prefer half-board, self-catering and bed and breakfast types of holidays where they would need to spend extra money on food and beverages. The other obvious reason could be differences in price levels between Mallorca and Turkey. Similar items of food and drink may cost more in Mallorca than in Turkey, e.g. coke, tea, coffee, wine, hamburger, pizza and so on. The sale of clothes and souvenirs is a kind of invisible export item

for the Turkish economy. Tourists in Turkey prefer to buy exotic goods such as carpets, jewellery and other types of clothes which reflect Turkish culture.

Nevertheless, tourists in Mallorca would prefer not to buy such goods since they have visited the island more than once, are aware of what is on offer in Mallorca and would prefer not to buy fake western-style clothes and so on. Tourists in Mallorca spent more than those in Turkey on visiting tourist attractions. It is known that theme parks -waterparks and marina parks- are an important part of tourism in Mallorca. These parks are very well promoted at different places such as hotels, rent-a-car offices, tourist information centres and billboards. In Turkey, tourist attractions such as cultural and natural places, with cheap or even free entry do not generate a significant amount of tourism income.

The local transport services in Turkey generated a higher amount of income compared to Mallorca. The reason could be that the resorts in this country are larger than those in Mallorca; therefore tourists had to take taxis or 'dolmus' services. The local transport services in Turkey are also well-organised. Although spending on local transport services is less, it is higher for rent-a-car and day tour services in Mallorca. As it is a small island and rent-a-car agents provide good offers, tourists may tend to explore more widely in Mallorca. In Turkey, it is not so necessary to rent cars as there are regular transport services to the most popular places and due to problems for cars of traffic and limited parking space.

Clearly, the type of holiday taken is related to the type of package holiday on offer. All-inclusive and full-board holidays give tour operators the best profit margins. Similarly, the tourists who choose such holidays tend to spend less at the destination (Poon 1998). A certain amount of the cost of a package holiday is retained by tour operators in the home country. This means that accommodation, individual food and beverage facilities and the destination itself would get less money when selling this type of holiday. The preliminary analysis of the findings demonstrated that those who travelled alone or with one other companion spent more per person

than those who travelled in larger groups. Those who stayed for 7 days spent more person than those taking a 14-day holiday. A possible recommendation could be the promotion of holidays with room only, self-catering and bed and breakfast, to attract tourists with fewer companions who take shorter holidays.

10.3.2.3. Other Quantitative Measures

Mallorca's tourist trade is dominated by the European market primarily Britain and Germany. These are also the major markets choosing Turkey. Mass tourism is still important to both destinations. Both are now attracting Cohen's (1972) 'organised mass tourists' who rely on a holiday company. Although this has a negative effect on the natural and cultural environment (Grant, Human and Le Pelley 1997), local authorities and tourism businesses can also benefit from undertaking maintenance work, training employees and other local people and performance evaluation as seasonality is a feature of mass tourism, e.g. weather conditions and holiday-taking patterns of tourists. Butler and Mao (1997) suggest the use of different marketing policies such as market diversification (e.g. attracting retired people who have more time to spend on holiday) and price verification (e.g. reducing prices of goods and services at the destination as well as tour prices). The other option is product development.

In Turkey, it has now been realised that other types of tourism such as heritage, activity, health and nature-based (ecotourism) should be encouraged and promoted. Among the proposed alternative forms of tourism products are thermal and health spas, religious visits, culture, physical recreation, air ballooning, hunting, golf-tourism, winter sports, camping and caravanning, which are primarily based on recreation, culture and health. Some of these are still in their infancy. In Mallorca, as a part of long-term planning the local authority has decided to revitalise the image of Mallorca, extend tourism to other seasons and attract 'niche market' customers including those travelling to conferences or on business and sports such as

walking, cycling, golf and yachting. To promote this, legislation has been introduced to tighten building controls and prevent overdevelopment.

Turkey has over-invested in the infrastructure and superstructure of tourism in the country, but has spent less on marketing them. Therefore, the distribution of large-scale accommodation establishments in both destinations is diverse. Turkey is encouraging the construction of large hotels and holiday complexes whereas Mallorca has given priority to high quality small- and medium-sized establishments and demolished large old hotel buildings. Considering its customer profile, Turkey may need to re-evaluate the structure of its accommodation capacity.

Tourists travelling to Mallorca stay much longer than those in Turkey. German tourists in Mallorca stayed twice as long and those from the UK, Switzerland and Benelux countries stayed three times as long as those going to Turkey, while tourists from France and Italy stayed about four times as long. The difference in the average period of overnight stays between the two destinations could be accounted for by Mallorca's higher proportion of package holidays which tend to run for a minimum of seven nights. This measure could be a good benchmarking exercise for destination managers to investigate the profile of customers with shorter and longer visits.

10.3.3. Overview of Qualitative Measures

10.3.3.1. Motivations

Relaxation and pleasure were the motivations which scored highest for both sample populations and for both sample destinations. It is clear that people tend to travel abroad to enjoy good weather, relax, spend time with those whom they care about and to be emotionally and physically refreshed. Consistently, Krippendorf (1987) stated that relaxation and getting away from routine life were the first two psychological reasons for taking a holiday. In family life cycle research, relaxation and

escape were found to be the most important reasons for travelling abroad (Hill *et al.* 1990). Briefly, corresponding with Plog's (1974) and Ryan's (1997) related statements, it might be speculated that both Mallorca and Turkey attract primarily psychocentric types of tourists; in the summer season the market is dominated by package tours.

This study suggests that motivations differ from one person (or group) to another and from one destination to another. This finding corresponds with past research suggesting that personal motivations and destination attributes should be used for establishing destination positioning studies (Uysal and Hagan 1993; Solomon 1994; Bothe, Crompton and Kim 1999). The differentiating personal motivators identified in this study as being most useful for positioning Turkey were culture and nature. The differentiating destination attributes for Turkey were the level of prices/costs, people and culture, and scenery and landscape. The study did not indicate any personal motivators to enable Mallorca to differentiate itself from Turkey. The differentiating destination attributes for Mallorca were being family-oriented, availability of sea/beaches, availability and suitability of night-life/entertainment and the relatively shorter flight time compared to Turkey. These findings provide valuable implications for destination benchmarking in order to understand the type of tourists a destination attracts.

The recommendation for destination management authorities could be that Turkey should concentrate its efforts on the development of cultural and natural resources to make itself more competitive in the market. The cross-cultural differences between British and German tourists in Turkey have the potential to attract the German market for culture tourism. There is also an implication that destination management in Mallorca should concentrate their studies on the German market for cultural, natural and sport tourism as this group had higher motivations for these types of tourism than the British sample. Naturally, cultural and natural tourism could bring more tourism revenues than the traditional summer and beach tourism. This is described by Porter (1996) as the 'needs-based positioning strategy', which

aims to target a particular segment of customers when significant differences are observed in their needs.

Mallorca is surrounded by sea and so access to beaches is easy and it has few remains of classical civilisations, so the main products in the region are yachting, beaches, sports (such as golf, mountain biking, hiking), watersports and cruising. It is also perceived to be more family-oriented as it pays a lot of attention to the development of facilities and activities such as watersports and aquaparks particularly for partners accompanied by children. The shorter flight time makes Mallorca attractive for both groups. The wide coverage of Mallorca in the British media shows the strong links between the two countries. A great number of holiday programmes on TV are devoted to Mallorca, e.g. Passport to the Sun, BBC Holiday Series. Specifically, Turkey has the disadvantage of being further away from the British tourist market.

10.3.3.2. Tourist Satisfaction

As stated earlier, the reason for the inclusion of the tourist satisfaction measurement into the concept of destination benchmarking is that each destination needs to know its strengths and weaknesses in order to serve customers better. Several practical implications derived from tourist satisfaction surveys are given below.

Hospitality and customer care were a very significant factor affecting both sets of respondents' overall trip satisfaction in Turkey and their intention to revisit and recommend. This attribute was also one of the most critical elements of those destinations in Turkey which gave one of the largest positive gaps in comparison with Mallorca. This means that both British and German tourists were mostly satisfied with the helpfulness and friendliness of local people and staff in Turkey. Despite Turkey's tradition of hospitality, on the other hand, being harassed has always been a major complaint among tourists visiting the country. In order to satisfy tourists, local people and shopkeepers can be advised to change their behaviour. This is

achieved through training, rewards or incentives. Local civil tourist organisations in Turkey have also become more concerned about this problem. For instance, the Association of Kemer Tourism and Businessmen has recently established a committee to investigate tourist complaints of harassment by shopkeepers in the area (*Cumhuriyet* 7.11.1999). Recommendations for benchmarking destinations in Turkey could be that tourism officers and local service providers should be exposed to cultural awareness training programmes to learn the principles of cross-cultural interaction and communication. This would help service providers to understand and predict the difficulties which may be caused by cultural differences between hosts and guests.

A significant gap has been recorded between tourist perceptions of the price levels in Mallorca and Turkey. The latter was found to be more satisfactory and much cheaper than the former. Being perceived to be a cheap sun and sea destination, Turkey has become popular with tourists who travel to enjoy good weather, sea and beaches. It may not be reasonable to suggest Mallorca to promote itself as a cheaper destination because identifying price levels is a complex issue and influenced by various external factors. One recommendation could be that Mallorca should try to attract customers with higher income levels during the peak-season.

The general availability of facilities and activities in Turkey was found by both sample groups to be slightly better than that in Mallorca. Both questionnaire 1 and 2 confirmed this. This is not an unexpected result because, as a new destination, Turkey offers its customers varied opportunities during their holiday. Mallorca outperforms Turkey on providing catering services for family groups. To be perceived as a family holiday destination, establishments in Turkey should provide a variety of facilities and activities tailored to the special needs of younger children and their parents.

The level of accommodation services contributes strongly to the level of overall satisfaction and future behavioural intention of both British and German tourists in

Turkey. According to British tourists' feedback, there is no major difference between Turkey and Mallorca in the level of accommodation services. Both were perceived to be satisfactory, almost at the 'about the same level'. German tourists, on the other hand, gave a more precise picture showing a gap unfavourable to Mallorca. As the majority of the accommodation stock was built after the mid-1980s and from the early 1990s, Turkey has many new hotels with their various facilities and activities. Customer care in hotels is also a priority. Authorities in Mallorca have decided to replace the old accommodation stock by new buildings in a collaboration with foreign tour operators.

Despite the fact that standards in Turkey were found to be slightly better than Mallorca in terms of the level of cleanliness, hygiene and sanitation, customers in both destinations would like to see further improvements. In comparison with other self-reported destinations, these factors were sometimes perceived as better, sometimes as worse. As Turkey is a very new destination in international tourism, there does not yet seem to be a major problem with the cleanliness of the sea. However, if any lesson can be learnt from Mallorca, any deterioration in the quality of the sea water should be dealt with immediately. Thus, an effective code of practice concerning safety, security and cleanliness should be established to encourage both customers and suppliers to become environmentally-friendly.

It is apparent that German tourists in Turkey are not so happy with the level of language communication and the resort airport as those in Mallorca. Some suggestions may be in order for Turkey, for instance designing tourist information packs. Tourists could be provided with information about attractions, where to swim, walk and shop, day trips, the host-guest relationship. Leaflets, brochures or newspapers printed in various languages could also be helpful. Facilities and services at tourist information centres need to be improved, e.g. accessibility, appearance, communication. More signposts are needed. In terms of the availability of airport facilities and services, a new or a reorganised airport is required since the existing one fails to meet passengers' needs.

Transport services in Turkey are much better than those in Mallorca. As the authorities confirmed, transport is a serious problem in Mallorca. New measures are on the way to improve both roads and local transport services in Mallorca.

Finally, past research further demonstrated that there was a negative association between customer satisfaction and market share (Fornell 1992; Anderson, Fornell and Lehmann 1994). Thus, the level of customer satisfaction decreases while market share increases. A similar finding is also present in this research in spite of the limited range of customer groups. While there was no problem for British and German tourists who stayed in different resorts or accommodation, those who found themselves in close proximity seemed to be dissatisfied with the existence of the other group. Some tourists felt they were being ignored as they assumed that another group were getting better service than themselves. Such cases also apply to different market segments from the same country, e.g. young single tourists and family tourists. Some members of the second group were extremely dissatisfied with the behaviour of young single tourists in Mallorca. Major complaints about this group were that they drank heavily and were noisy at night and in the early morning. More generally, maintaining a certain level of customer satisfaction could be sometimes difficult for destinations that cater to several groups. This is a complex situation for Mallorca which is promoted as a family destination on the one hand and attracts an increasing number of young tourists on the other hand. Thus, working with a more homogeneous segment of the market could provide a competitive advantage (Heath and Wall 1992). It was found that industries selling homogeneous products to homogeneous markets had higher customer satisfaction scores (Fornell 1992).

10.3.4. Documentation

As the tourist market is dynamic and competitiveness requires the deployment of continuous improvement programmes, changes in the market structure need to be well observed and documented. Both Mallorca and Turkey have well-documented

quantitative measures such as the number of tourists per month and per year, the distribution of tourists by nationality and socio-economic and socio-demographic clusters, the distribution of the length of stays by nationality, destination, months and years, level of tourist expenditure, the capacity of accommodation stock by destinations, type and years. In terms of documenting qualitative measures, Turkey is not as successful as Mallorca. The Department of Tourism in the Balearic Islands documents the survey findings of qualitative measures to use as comparative instruments for historical data kept in records on a seasonal and annual basis. The availability of historical data and its extension to future periods will aid in monitoring changes in the market structure, changes in the market's wishes and motivations, and customer satisfaction and complaints. As a significant practical implication of this study, Turkey needs to draw attention to the importance of keeping records of qualitative measures and their potential use in the industry since the collection of these sorts of data is still either missing or not well-organised.

10.4. Summary

This chapter has set out a general discussion of the application of benchmarking in tourist destinations and its implications for benchmarking theory and practice. It was based on the findings emerging from the case studies on Mallorca and Turkey. The relevance of benchmarking to tourist destinations was examined through measuring destination performance, types of destination benchmarking and taking action. Specifically, this chapter has attempted to reach the following objectives: (1) to develop specific measures and test them; (2) to test out the applicability of internal and external benchmarking to tourist destinations; and (3) to examine the possible factors influencing the stage of taking action.

For a destination management to evaluate its actual performance level, a list of quantitative and qualitative measures was developed and tested using sources of primary and secondary data. From the research findings, it is apparent that specific measures could be developed for destinations, e.g. customer satisfaction, customer

comments, tourist arrivals, tourism income, occupancy rates and the distribution of these measures by nationality, seasons or years. These measures may be used to evaluate own performance, examine the possible gaps and make decisions to close them.

The results of the case studies demonstrate how priority could be given to different aspects of destinations. The main feature of the destination benchmarking approach used in this study is that it should start with understanding the motivations and satisfaction level of customers visiting destinations on the demand side. It should end with taking further actions for destination attributes on the supply side. This means that destination benchmarking has two main steps in the actual benchmarking process: demand and supply sides. The demand side refers to the process of converting customer perceptions into quantitative data by employing numeric scales such as likert or semantic differential scales in order to identify gaps, make comparisons and take action. Though it may be impossible to regard tourist motivations as a part of performance measures, they will be very helpful for understanding the types of visitors choosing the destination and features of the main resources at the destination attracting tourists. Data collection is helpful in learning about the performance of destinations and making recommendations. In the supply side, tourism development trends, marketing and promotion, tourism policies and the contribution of tourism to the local economy are analysed (resuming management and marketing strategies). All this supply-related research is expected to help in determining whether the benchmarking results have been successfully put into effect. The strategy to be followed can differ depending upon the type of the benchmarking approach employed.

The applicability of benchmarking to tourist destinations was examined through testing internal and external benchmarking approaches on an individual basis. The main difference between internal and external benchmarking is that the former designs benchmarking along the lines of the feedback obtained from one's own customers and members (internal data). This approach considers the measurement and

improvement of the performance on the basis of a comparison to earlier outcomes. A positive gap shows that the destination performs better than it used to in some respects. External benchmarking refers to identifying one's competitiveness level and obtaining information about new practices and methods by comparing the findings of both internal and external data, examining the potential reasons for gaps and assessing the utility of outcomes for the host destination. The destination which has a superior score is believed to be performing better than the other in the sample area.

Although it has been found that external benchmarking helps to show where a destination is stronger or weaker and to adapt some good practices from another, it is also obvious that each destination has its own regional differentiation and unique characteristics in some respects, e.g. attractiveness, attributes contributing to tourist satisfaction, tourist spending patterns, regional political, cultural and economic structure. In line with these findings, this research suggests that certain aspects of service quality are unlikely to be considered as a proper benchmarking element against other destinations as some aspects of physical or technical quality are. As a result, finding the most suitable destination as a partner and defining the attributes to benchmark is a major problem in external benchmarking.

This research also indicated differences in the majority of measures between British and German tourists. This is a vital issue while undertaking either of the benchmarking approaches. All these findings are useful in bringing about a consensus on what constitutes a proper exercise in respect of carrying out internal and external benchmarking as the literature includes a variety of models. Given this, it is possible to say that this research makes a fresh and innovative contribution to the literature not only on tourism but also on benchmarking. The final chapter summarises the main arguments for the proposed model and discusses the potential contributions to the literature, limitations and recommendations for practices and further research.

Chapter Eleven

Conclusion

11.0. Introduction

This concluding chapter summarises the main arguments and findings of the study and considers some of the potential contributions and implications of the research findings and their limitations on the basis of methodology and theory. Recommendations regarding further theoretical and practical applications of destination benchmarking are also presented. The chapter begins by giving an overview of the proposed model of destination benchmarking built upon internal and external benchmarking approaches.

11.1. An Overview of Internal Destination Benchmarking

The main purpose of internal destination benchmarking is to improve the performance of tourist destinations by identifying their own strengths and weaknesses on the basis of the feedback obtained from travellers and the local population. From the research findings, it appears that internal benchmarking may be used as an alternative method to external benchmarking. In today's multi-functional and multi-cultural world, some destinations may have their own cultural, economical and political characteristics which have limited application to transfer to others or cannot easily be revised by looking at others, e.g. hospitality, hassle, low currency exchange values, and tourist and visa regulations in Turkey. As the findings of this research suggest, these indicators may be measurable and compatible, but not comparable for use in external benchmarking. In deciding which elements to benchmark, internal benchmarking suggests three methods.

First, the performance levels of each benchmark based upon the selected measure can be ranked from the highest to the lowest values. Those with the lowest scores or lower than the expected score can be chosen as the potential areas for improvement. This also applies to the assessment of the relationship between individual measures and the level of overall satisfaction and the intention of repeat business and word-of-mouth recommendation by performing regression analysis for qualitative measures. As this research demonstrates, advanced statistical methods such as factor and regression analysis can be efficient tools identifying the strongest and the weakest destination attributes influencing the level of overall satisfaction and respondents' future intentions. For instance, hospitality and prices (in Turkey) and hygiene and cleanliness (in Mallorca) came out as the strengths of the sample destinations. The research revealed 'hassle' as the main problem in Turkey.

Second, the comparison of the current performance with that of past years on tourist satisfaction and expenses may be another dimension for internal benchmarking. The examination of the overall performance of a destination compared to previous years may potentially support the success of the destination benchmarking study in a process which aims to make a comparison with other destinations. Meanwhile, a destination might measure its annual or periodic performance level by comparing and contrasting the current results relating to tourist satisfaction and complaints to the results in the previous period. The areas with lower scores will indicate where an internal benchmarking study is needed. As benchmarking is a continuous measurement and analysis process, it could be of benefit to understand any positive or negative results on the sustainability of a destination's performance relating to different qualitative items. This type of qualitative measurement requires the establishment of a database where findings are accurately recorded and comparisons are made with previous months or years. In addition to comparison with previous years, repeat customers' perceptions of changes in the performance of organisations could be regarded as an important internal benchmark.

Next, some of the comments made by customers are valuable for undertaking internal benchmarking, e.g. what and how to improve. As a response to the hassle problem in general and the long queues at the resort airport, visitors in Turkey stated that they wanted to make their own decisions about where to shop and they should be allowed to pay for their visas before arrival. Those in Mallorca were more concerned about overdevelopment and segmentation. They wanted the local culture and environment to be protected and different resorts to be provided for different market segments.

In terms of quantitative measures, analysing the share of the tourism industry in the national economy and within international tourism seems to be a better performance measurement criterion than analysing changes in national figures from one period to another. This criterion was only used for the assessment of the volume of tourist arrivals and the amount of tourism revenues in this research. Other measures such as the distribution of arrivals by nationality and months were compared to previous years because data regarding international tourism were limited.

Once the assessment of changes in one's own performance levels is completed, there is a need to assess how big the problem is and how ambitious the goals are. It will not be necessary to take an external benchmarking approach if the destination itself can provide solutions for overcoming the problem and is able to reach its goals. However, it is surely necessary and must be encouraging to review other holiday resorts if the destination management is interested in being open to external ideas and practices and take further steps in international tourism.

A complete internal benchmarking report should include information on what measures have been benchmarked, which methods were used to collect and compare data, where gaps appeared and the potential reasons for them, what has been learnt during the study, how this helps to improve standards, what methods need to be applied in practice, and finally, whether these findings signal the necessity of undertaking an external benchmarking exercise.

In taking action following the completion of the main stage of internal benchmarking, implementation of results is limited to feedback obtained through internal data (e.g. customers' opinions and comments) and internal communication (e.g. comments and opinions of the local people involved in tourism). Once the strategies are proposed and are given support, implementation is turned into practice. By using internal benchmarking, environmental sources, human resources management, collaboration management and market segmentation, which were all discussed in an earlier chapter, may be improved.

As for the strengths of internal benchmarking, it helps to find the methods which are relevant to a particular culture and practices and build up local strategies on the basis of the characteristics of the managerial and social culture and specific objectives. There is no need to spend time in collecting data from others and observing their performance levels. On the other hand, as to its limitations and weaknesses, internal benchmarking seems to be contrary to the purpose of benchmarking, which basically requires looking at others and obtaining information about new practices. There are no external data for comparison and comparable practices to use as examples when carrying out an internal benchmarking process. In the increasingly competitive world of tourism, it may be a mistake to exclude outside observation. If so, it might be unreasonable to expect a destination to reach the level it aims to achieve in international competition.

11.2. An Overview of External Destination Benchmarking

The necessity of developing an external destination benchmarking approach emerges from the fierce competition among international tourist destinations and rapid changes in customer needs, wants and expectations. Therefore, this approach aims to measure one's own and others' performance on the basis of various criteria, compare it and identify if there is any room for improvement in the host destination by looking for good practice and successful strategies used by other destinations. As a result, based upon the methodology used and the findings assessed, this re-

search suggests carrying out an external benchmarking exercise in the following order.

11.2.1. Choosing a Partner

There is limited material on international tourist destinations, but publications such as statistics, industry reports, government sources and academic papers can be helpful in choosing a partner. Additionally, visits to other destinations can provide an opportunity to make observations regarding what and how they are doing. When these observations have been completed, a decision can be made. Generally, it is expected that destinations which are performing better on a number of criteria and are thought to be worth sharing ideas with, can be approached as potential partners. Another method is to obtain feedback from customers visiting other destinations. All these methods would be helpful in evaluating the main features of other specific destinations and their performance levels. To give several examples, mass tourism destinations such as Cyprus, Greece, Tunisia, Portugal, Spain and Turkey seem to offer similar types of products with similar marketing campaigns, facilities and attractions.

When looking for a suitable partner, destination management should initially pay attention to the characteristics of each destination, to their similarities and their differences. The classification presented in Chapter 4 (Table 4.1) provides basic information with regard to the features of each destination. International tourist destinations differ depending upon the types of tourism activities and tourism demand they have. While choosing a partner, customers' satisfaction levels, and their socio-demographic, socio-economic and holiday-taking characteristics and motivations should be investigated. This research also considers the number and types of tourism businesses and activities, their current position and performance indicators such as customer satisfaction and occupancy rate. This could help destination authorities obtain a broader picture of their and their partner's visitors. This type of approach is helpful in making a decision about whom and what to benchmark.

11.2.2. Data Collection Tools

Use of multiple sources of data collection provides sufficient evidence to carry out a full destination benchmarking study. Both quantitative and qualitative research methods are suitable for using in destination benchmarking research in different respects. The former is used to explore differences between the levels of tourist satisfaction, motivations and tourist expenditures. The latter gives an overview of secondary sources of data, the administration of open-ended questionnaires and personal observations. This could support the findings of quantitative research. Structured questionnaire surveys only show where any weaknesses or gaps appear, but are limited in indicating their root causes (performance benchmarking). To be able to understand this, secondary data collection methods and further empirical research such as observations and interviews with customers, tourism suppliers and authorities need to be considered in the analysis stage of destination benchmarking (process benchmarking). As each destination is different, it is necessary to take a more qualitative approach and the focus should be on process/practice benchmarking as it attempts to identify why one is better than another.

11.2.3. Identifying Performance Gaps between Destinations

Once data has been collected and analysed, the strengths, weaknesses, opportunities and threats of each destination can be clearly understood and recommendations for improvement formulated. In order to be able to make an effective analysis of performance gaps between destinations, two methods are recommended.

A factor analysis is carried out to include all attributes, to subdivide and narrow them into specific groups, and differences between the two destinations in respect of each group can be presented by using a gap analysis model. There has been a very limited use and variety of statistical tools to test the significance level of results yielded from the comparison of qualitative measures such as mean scores. There may be no need to use statistical tools for the assessment of some quantita-

tive measures, but it is necessary to do so for qualitative measures when a large sample population is involved. There may be gaps but it is difficult to perceive how significant and how large they are. Unlike the traditional gap analysis model, this research suggests using statistical methods to reveal the magnitude of the proposed gaps. The result will either be positive, negative or neutral. Attributes with larger statistical values result in larger gaps than those with smaller mean values in terms of mean scores. This type of analysis also helps to concentrate on those attributes with larger or smaller statistical values, depending upon the future objectives.

This method has one major drawback, namely, if two destinations have different types of customers and different types of products and services. In which case, questionnaire 2 can be recommended as it gives customers an opportunity to make a direct comparison between their holiday experiences at the destinations they have visited. There is no need to carry out a similar type of statistical analysis for this type of survey.

Following this form of analysis, a negative result indicates that a performance gap exists between the host and the partner destination either overall or for specific attributes. A positive gap indicates the superiority of the host destination compared to the partner. Differences between attributes where the partner is strong and the host is weak refer to the negative gap (and vice versa). This research confirmed that a benchmarking gap can also be neutral where no identifiable difference in performance between compared attributes or overall is found. A large negative gap will be a warning signal which means that a radical change is required, e.g. Mallorca with its larger negative gaps on the level of prices and hospitality compared to Turkey.

11.2.4. Focusing on the right issues (Deciding what to benchmark)

The findings of external benchmarking identify performance gaps between destinations and opportunities for improvement (McNair and Leibfried 1992). Although it

seems easy to learn how people perceive destinations by employing a set of attributes, destination benchmarking has a problem in finding the most appropriate attributes to measure. Here, attention must be paid to both controllable (e.g. facilities and services) and uncontrollable attributes (e.g. weather and culture). The measurement of controllable attributes in destination benchmarking offers more potential for bringing about improvement. For instance, people can perceive climate, culture or natural attractions at one destination as being worse and better than another. This does not necessarily mean that these attributes should be considered as benchmark elements. They are unique to different destinations and it is hardly possible to change them in the short run or even in the long run.

In benchmarking, variables are classified as being changeable either in the short or long term. Depending on the destinations' policies, either of these variables can be taken into a benchmarking study. Watson (1993) emphasises that the importance of benchmarking emerges from the reality of what measure or measures give the best results in terms of what needs to be known and can potentially be changed. To accomplish this, there should be a prioritisation process according to whether the element is important to customer dis/satisfaction, whether results are unexpected and whether there is a possibility of improvement (Balm 1992). Prices, hospitality (culture) and accommodation services are some of the areas providing opportunities for Turkey to focus on for improvement as these are potential core competencies in the future.

In summary, the main benchmark elements to be measured can be divided into the two broad categories of supply and demand. The former can be related to the contribution to the local economy, marketing and promotion of the destination, and availability of infrastructure and superstructure. The latter can be related mainly to tourist perceptions and experiences, their profiles, expenditure levels, repeat visits and so forth. Therefore, sometimes one type of research method, e.g. customer surveys, may be inadequate to understand the relevant aspects of any destination such as analysis of tourism development, product development, effective factors in

the past and in the present. This may require other methods such as statistics, observations, case studies and documents.

11.2.5. Presenting the Benchmarking Findings

Upon deciding which attributes should be benchmarked, site visits to the partner destination could be arranged in order to conduct more detailed investigations into how their partner is performing and how it has achieved success on particular results or subjects. During this stage, local private businesses and public authorities may be interviewed, formal policies and legislation could be examined and the overall position of the destination could be monitored. All these activities can be carried out in the host destination. The outcome will produce a similar table to Table 10.4, but in an extended form. This type of summary table is useful in helping to decide which areas to focus on. The complete benchmarking report will include information on what measures have been benchmarked, which methods used to collect and compare data, where gaps appeared and what the potential reasons are, whether the partner is a suitable one in relation to applying its practices or strategies, what has been learnt during the study and what methods need to be applied in practice.

11.2.6. Taking Action

While taking action as a result of external benchmarking, opinions can be received through both internal and external data. Further sources are also available through internal and external communication with the representatives of the local and other destinations and through personal observations (reverse engineering). The completion of this stage could then be followed by encouraging internal communication amongst the related bodies of the destination such as professional organisations, government offices, local residents and travel agents. Through internal communication, the management can discuss the outcomes of the external benchmarking activity and its implications for the performance improvement of their own holiday

destination, inform members about good practice applied by other destinations, encourage them to get feedback on what to do and how to do it in the future, and ask for support in the implementation of the required changes or strategies.

11.2.7. The Rationale for External Benchmarking

It seems obvious that destinations need to benchmark their facilities and service levels against those of their counterparts. In conducting external benchmarking, current performance levels in terms of the competition are measured. Benchmarking can enable a destination to learn from others' successes as well as to evaluate mistakes. By learning what other destinations are doing, destination management can build a stronger case for allocating resources in ways similar to those of successful destinations. Without benchmarking no comparison can be made and therefore the performance gap cannot be established. Reviewing the proposed model and the findings presented earlier in this research, it seems possible to suggest that an external benchmarking approach offers destination managers three benefits: (1) measuring one's own performance and comparing it with others, (2) identifying the strengths of the destination, (3) searching for best practice in other destinations to apply to their own cultures and how to do this.

First, this research suggests that the examination of quantitative measures is not enough to evaluate the performance of destinations. There are other specific measures of success which will lead to the destination raising their sights and achieving higher performance levels. The success of these measures, called qualitative measures, may also make a contribution to the success of quantitative measures - more tourists returning, more word-of-mouth recommendation, more customers and increased tourism revenues, and as a result, possibly a higher share of international tourism. The essence of performance measurement in destination benchmarking research could be the identification of the profile of tourists, their motivations, their satisfaction levels, their comments for improving resorts with poor scores (or images), and comparison with competitive areas. All these suggestions may also ap-

ply to the competitor destinations in an external benchmarking study. Such an analysis may be helpful in identifying where one destination differs from another and areas where further improvement is needed. The identified measures could also make possible a continuous review of destination performance.

Second, this type of benchmarking exercise is helpful in determining how one destination differentiates its products and services from another, e.g. variances in customer service, quality and image (strategic benchmarking). Attributes which make one destination distinctive or more competitive than its rivals are described as 'determinant' attributes in the marketing literature (Swan and Combs 1976). The findings presented in this research could support the notion that destination satisfaction may be vitally important for maintaining a regional competitive advantage. As noted earlier, the concepts of benchmarking and competitiveness are strongly related. It is extremely important in maintaining competitive advantage in international tourism to know how to sell the experience of a holiday in a particular place (Crouch and Ritchie 1999). Such factors as cleaner beaches and establishments, more hospitable and friendlier local people, and cheaper prices could make one destination more competitive than others. In this research, for instance, Turkey is perceived as superior to Mallorca on prices, hospitality, accommodation services, local transport services and clean environment, the potential elements making it a direct competitor of Mallorca. Mallorca outperforms Turkey on the availability of facilities and services at the destination airport, language communication, in offering family-oriented products and offering a relaxed atmosphere without hassle. Such attributes could be used to differentiate Mallorca from its rivals, particularly those in the Mediterranean basin. Destination managers should set action plans to keep the current strength of their destination's performance on these attributes. Porter (1996) views this type of analysis as a 'variety-based positioning strategy' which is based on the choice of a specific set of product or service varieties rather than looking at market segments.

As emphasised earlier, some attributes are not related to only one specific destination in Turkey or Mallorca, but could have been a reflection of tourists' multiple experiences in the country. For instance, Mallorca has only one international airport. Similarly, local transport is important as it provides connections to other neighbourhood resorts. Hospitality and welcoming in a friendly manner is a general characteristic of the Turkish community, not limited to only one destination. All these statements also apply to the assessment of quantitative measures such as the number of tourist arrivals and the amount of tourism income. These measures are more appropriate for showing a general structure and picture of tourism in a country rather than in a particular destination. Given these reasons, it is possible to suggest that the outcomes of a benchmarking project make a direct contribution to enhance 'regional or national competitiveness'.

The findings of external benchmarking are also capable of indicating similarities between destinations. Taking the level of tourist expenditure on board, no significant difference was observed between the amount of total tourist spending in Mallorca and Turkey, although Grabler (1997) expected that there would be differences between destinations for different age groups based on average incomes. The survey further indicated that the majority of German tourists (70% in Turkey and 53% in Mallorca) mentioned that they had spent nothing on visiting attractions. Similarly, some categories such as local transport, rent-a-car and day trips attracted a high proportion of low spenders in both destinations. It is important to analyse these findings to explore how likely the respondents were to be active and interested in seeing other places. It is unreasonable to expect that people spend more on local transport than on day trips and rent-a-car services if they want to travel more widely. These findings require further investigation in both places if a benchmarking study is to be carried out on this subject.

Finally, this research suggests that external destination benchmarking might be helpful in identifying several examples of good practice in other destinations. To achieve this, feedback can be obtained from customers through their comments and

perceptions of holiday experiences in the host and partner destinations and through applying 'process benchmarking' which requires personal observations to register how others are doing. Following this type of approach, several examples of good practice were observed in Mallorca, e.g. a bigger airport with a relaxed atmosphere and air-conditioning, frequent signposting on beaches, facilities for disabled people, and half-price special menus for kids under 12 years old. Two items identified in Turkey as examples of good practice were the hospitality and the local transport services.

However, there are several limitations in external benchmarking. It may not be possible to succeed in improving pure service-based attributes (some dimensions of service quality) such as hospitality or the attitude of local people or language communication by copying service practices elsewhere because of cultural differences. It is more likely that success can be achieved in improving the tangible elements of tourism products and services such as facilities and services for children, accommodation, airport facilities and services, local transport services, and sports activities (service quality and technical quality); and improving hygiene and cleanliness, economical use of energy and water, disposal of waste and so on (standards of environmental quality). Thus, the external part of benchmarking appeals to different limitations in different countries. Attention must be paid to the distinctive features of each destination on the basis of economics, cultural, practices, beliefs, laws and regulations, which may lead to ethical dilemmas. This could be a barrier influencing the development and implementation of action plans, and whether they are successful or require revision.

As a result, rather than copying what others are doing, external benchmarking could be considered as 'a learning process for drawing lessons from one organisation and translating them into the unique culture and mission orientation of a different organisation', as Watson (1994: 6) suggests. This statement, along with the research findings, convincingly supports what the benchmarking literature suggests as being 'apple to apple comparison' which means choosing similar items, practices

or activities and focusing upon them (McNair and Leibfried 1992). The success in the preparation, analysis and action stages of benchmarking is likely to influence success in the later stages and periods. It is worth noting that external benchmarking should be perceived as a tool not only for performance management and improvement but also for revising marketing strategies.

11.3. A General Overview of Destination Benchmarking

The recommendations for the practical applications of benchmarking include the stages of identifying measures to benchmark, the design of the approach to follow, deciding how to collect data, setting out strategies and their implementation. It is important to bear in mind that there is no best practice to observe and apply; therefore, benchmarking must be perceived as a method of learning from our own as well as others' successes and mistakes and assessing their utility to one's own culture and objectives, rather than accepting it as an attempt to copy what others are doing and providing.

As discussed earlier, developing and using destination-specific measures helps to identify current performance and monitor the direction of changes over a period. Measures identified during the planning stage of benchmarking may also help to determine the magnitude of the performance gaps between destinations and select what is to be benchmarked, as they do in organisation benchmarking (Vaziri 1992; Karlof and Ostblom 1993; Madigan 1993). It is also possible to shape up future strategies depending upon the measures and their findings obtained in a benchmarking project. For instance, it might be necessary to pay more attention to those areas where satisfaction scores indicated lower performance. In terms of the potential use of measures in destination benchmarking, the quantitative measures can only indicate where gaps exist, but are unable to provide any insight into why the selected areas perform well or poorly. This is what the use of qualitative measures aims to achieve. For instance, any problem with a low level of satisfaction with cleanliness could pinpoint the potential reason and arrive at the conclusion that it

needs to be improved. It seems probable that there is also a potential link between both measures. Improvements in qualitative measures may lead to improvements in quantitative measures, e.g. the impact of the increased satisfaction over the number of tourist arrivals or increased tourist expenditure.

As in every organisation and industry, destination management authorities need to establish an effective mission statement which is feasible, motivating, distinctive, achievable and conforms to the general aims of management. In a competitive environment, each destination has to check the positions of its products and services on a regular basis. If necessary, older strategies may be replaced by newer ones. In the light of these guidelines, the mission statement of destinations can be set as, for example, 'to benchmark our performance levels against those of other destinations in order to seek better practices and gain a higher level of performance through a higher level of services, a better image and more effective word-of-mouth recommendation'.

Different destinations have different objectives and expectations from the tourism industry. Some destinations tend to offer a variety of tourist facilities and activities and be year-round destinations which attract top-class customer groups whereas some others only want to offer seasonal facilities and services for middle or low-class customer groups. All such objectives will be related to destination benchmarking as they will influence the extent to which authorities are ambitious in the international market. There could be different marketing mix concepts for different market segments relating to tourist destinations as customers may have different personalities, needs and desires. Hence, for example, destinations can focus only on specific tourism products to approach specific segments of the tourism market.

Due to the differences between tourists from different markets, as benchmarks for tourist destinations, measures could be examined in particular ways, e.g. by nationality and season or by comparison with other destinations. This type of assessment helps to measure the real performance of destinations for each market on the basis

of, for example, the type of motivations, the level of tourist satisfaction, comments or complaints, the share of tourist arrivals, the volume of repeat tourists, the level of tourist expenditure and the length of stays. A separate benchmarking study should also be undertaken for each customer group representing a particular country (both in internal and external benchmarking).

Destination management should identify the attributes that really need to be benchmarked and set clear goals and objectives regarding what is expected to be gained at the end of the process. There is always a need to define clearly the goals of every plan and programme. Goals are the main vehicles for establishing plans and taking action. Objectives are the operational and measurable forms of goals (Heath and Wall 1992). The goal stating that 'annual tourism revenues will be increased' can be transformed into an objective such as, for instance, 'a 10% increase in tourism revenues will be expected'. As such, objectives are more specific and clearly identified to reach goals. Goals and objectives can be prepared as a part of short and long-term planning procedures. Depending upon the type and mission of destinations, objectives can be set to increase the number of arrivals, the level of tourist expenditure, increased satisfaction and a better image, maintenance of a sustainable form of tourism activity balancing supply and demand or focus on attracting only some markets. Based on developments in the business environment and changes in tourism demand, destination management may define its goals and objectives for every new tourism season or term.

Although destination management can decide on a benchmarking exercise at any time, there should be a specific reason for carrying out a benchmarking study. It should usually be carried out when:

- ◆ tourism demand for the destination or tourism revenues are in decline,
- ◆ there appears to be tourist dissatisfaction or a lower level of satisfaction,

- ◆ there is enthusiasm for following recent developments in the tourism and travel industry,
- ◆ findings of market research and destination performance measurements fail to meet expectations,
- ◆ the objective is to maintain a competitive advantage and overtake competitors in the market.

Considering Butler's (1980) model used to evaluate the indicators of life-cycles of destinations, each stage could be an indicator to show how the destination performs. Destinations where tourism is a new industry could model themselves on others which are regarded as being mature and at the next stage. For those that are at the stage of 'stagnation' and 'decline', the best benchmarking partners would be those who had had similar negative experiences in the past (Watson 1997). Drawing conclusions from others' previous negative experiences may sometimes provide positive or better experiences and advantages.

In addition, depending on the type of destinations, a benchmarking study can be carried out at the end of each season in order to set a performance measurement portfolio. If the destination has a year-round clientele, then it could be useful to prepare such a portfolio for particular periods to identify the main features of customer needs, wants and the structure of the local tourism industry and whether there are any seasonal fluctuations. These may help destination management review its strategies according to each period's features and particular requirements. Mass tourist destinations may conduct such data collection procedures at the end of each season. This will help destination management learn more about their seasonal performance levels, see whether they have recorded any improvements and make changes for the next season. For instance, the Department of Tourism in Mallorca has created a database with the findings of surveys carried out three times a year; these are published for the information of those who are interested in tourism on the island. Interpreting these findings, it is possible to see how much difference

there is between the current year and previous years and between high and low seasons.

Following the benchmarking process, it is possible to learn about the present and future performance of destinations. Presenting the findings helps to elicit what strengths and weaknesses have emerged and what opportunities and threats exist to maintain a sustainable development. This data will be instrumental in setting goals and making recommendations. Upon completing all these stages in benchmarking, an action plan containing future goals and recommendations should be presented. Setting goals will consist of defining a destination's strengths and how to minimise weaknesses and threats in order to cope with the new applications and developments. Depending on the projected future performance of destinations, destination management may wish to change its marketing policies or markets. It may also attract similar groups of tourists by preserving its current image and by improving its existing performance.

Although the objective of organisation benchmarking is to change either the structure of the organisation or some of its operations in a way that increases its performance, it is not reasonable to expect that destination management should suggest that its members change all their products or the style of service they offer where any customer dissatisfaction may result or destination benchmarking research gives negative scores; but it can show ways in which to improve these areas. To do so, all bodies in one destination should have a commitment to improvement.

Finally, what quality management aims for is to sustain an ongoing improvement of the standard of facilities and services they provide. This is also what benchmarking aims to achieve. In the light of these two statements, it is possible to suggest benchmarking as a management technique to improve the quality of service provision. However, as the subsequent impact is expected to lead to an increase in the market share, benchmarking also helps to maintain the competitiveness of a desti-

nation by identifying methods for improving its performance and increasing its market share in the international arena.

11.4. Limitations

Though results are largely consistent with the research hypotheses and support the proposed model, several caveats have been identified, these relate to both the design of the research methodology and the underlying theory.

11.4.1. Limitations of Destination Benchmarking Methodology

The limitations of the methodology for destination benchmarking research can be summarised as the scale development (capturing all relevant items), sampling and operationalisation of questionnaires including carrying out surveys and performing statistical tests.

1. **Scale Development:** Since the development of a perfect scale (or instrument) requires considerable effort, time and financial resources, this study was limited to extending scale development procedure. As a result, this research might not cover all angles of possible tourist motivation and satisfaction. In addition, the list of pull motivation items (destination-based) was designed as an open-ended question. This section needs to be transferred to the structured format of a research instrument to be able to examine how likely each variable is to be important to those visiting different destinations. This will in turn make the comparison process easier.
2. **Sampling:** The sample population of this study includes those visiting a mixture of destinations in Mallorca and Turkey. A desirable method would be to select those who visited only one destination in each country. Although the sample size is large, the current study is limited by its focus on only two types

of countries called 'mature' and 'less mature' and two types of sample population representing those from the UK and Germany. This was due to time and funding constraints and the difficulty of monitoring or observing the performance of several destinations. It would be desirable to replicate this study in different settings. For instance, future research could explore whether similar implications exist among winter destinations or between winter and summer destinations. A further cross-cultural comparison between different markets should also be considered.

3. **Data Collection:** The researcher experienced some difficulties in getting access to the collection of secondary sources of data relating to the tourism industry in Mallorca due to the geographical distance and language barrier. Though it was one of the purposes of this study to deliver another copy of questionnaire 2 for the part of research undertaken in Mallorca, it failed because the researcher had to complete the administration of surveys on his own in this destination.
4. **Data Analysis:** The literature suggests that separate factor analysis should be performed for each group when the sample is heterogeneous (multiple sampling), e.g. a sample of British and German tourists in this study. Nevertheless, in comparison research, all four groups of respondents were counted in the same pooled data (aggregated data) set of motivation and satisfaction items used for comparison assessment by performing a single factor analysis. It was practically difficult for the researcher to process a separate analysis for each sample group and then compare the findings due to the possibility of loading an attribute in a different factor for each sample group. Moreover, in addition to individual factors, the level of overall satisfaction may also affect future performance. This should be the subject of a separate study.
5. **Comparison Study:** The survey instrument used in this study was originally designed in English and tested undertaking a pilot study among British tourists.

The survey administered to German tourists was a direct translation of this without further modification. Although statistical tests were conducted to confirm the reliability of the individual scales for both nationalities, it is possible that there may be a specific attribute for each nationality.

6. **Future Behaviour:** The reliability of some findings such as tourist satisfaction is unknown since no test-retest analysis was performed due to the difficulty of its application into the phenomenon of consumer behaviour in tourism. The consideration, as a part of internal performance measurement of destinations, of the strength of the relationship between future behaviour intention and actual future destination choice is difficult to assume at present (Mayo and Jarvis 1981). This study did not consider whether tourists would like to come back either in the short term or in the long term. Future research should suggest a particular time limit within which tourists intend to come back.
7. **Specific Destinations:** This study considered both Mallorca and Turkey as single destinations and compared the overall performance of both destinations using quantitative measures rather than focusing on a specific destination in each country. The difficulty of reaching quantitative data (e.g. tourist numbers and tourism revenues) specifically relating to single destinations was one of the reasons for this limitation.
8. **Quantitative Measures:** This study attempted to test the availability of quantitative measures in destination benchmarking using broad output measures such as tourist arrivals and tourist expenses. Although these are significant measures in indicating the overall performance of destinations in a certain period of time, some other more focused quantitative measures might also be chosen for testing the destination performance. For example, the average length of check-in or check-out at airports or in hotels, how often the beach is cleaned or the level of prices using a standard basket of commodities.

11.4.2. Limitations of Destination Benchmarking Approach

The following nine paragraphs discuss the theoretical limitations of the destination benchmarking approach. These limitations are of interest when considering the future research and further development of the benchmarking model presented in this study.

1. **Industry-specific Features:** The existing organisation benchmarking studies mentioned in the benchmarking literature follow a defined sequence of activities such as plan, do, check and act (Camp 1989; Codling 1992; Watson 1993; Cook 1995). These activities could also be relevant to benchmarking destinations to some extent. However, as discussed earlier in this study, it appears to be more difficult to benchmark service operations than to benchmark products. This is due to the difficulty of quantifying qualitative measures and the lack of fully-accepted industry-wide standards and criteria on which to evaluate effective performance (Shetty 1993; Blumberg 1994; Johns 1999). For instance, it is not clear to what extent customers should be regarded as satisfied or dissatisfied with a destination or whether they would come back.
2. **Comparison Research:** Several conclusions have been drawn from customer-based comparative research (Smelser 1973; Deutscher 1973; Warwick and Osherson 1973; Mayo and Jarvis 1981). Attitude scales including satisfaction and image measurement cannot be evaluated by playing with the scores as numbers are just symbols indicating the direction of scales for each item (from negative to positive or vice versa). It may be impossible to reach a conclusion by multiplying or dividing scale values (Moser and Kalton 1971; Hair *et al.* 1995). The interpretation of the strength of a scale, for example 'terrible', could vary from one tourist to another. One person's feeling could be weaker or stronger than another's. As tourist opinions are not fixed, changes in people's values and perceptions are evident over time (Mayo and Jarvis 1981). This is defined by the marketing literature as 'temporal satisfaction' (Czepiel *et al.*

1974). In a reference to the difficulty of comparison research, Deutscher (1973) claims that the structure of language and the meaning of words in two different cultures or nationalities can be different. Warwick and Osherson (1973) further suggest that what is important to one nationality may be less important to another or not important at all. Thus, results obtained and assessed by using methods such as gap analysis and using the same set of questions in the survey instrument could still be problematic and superficial in a comparative research activity.

3. **Destination-based Features:** With reference to the above statement, there appears to be a problem in collecting the right kind of information upon which destination/s are to be compared, what dimensions/elements are to be taken into account and the difficulty of implementing findings because of the cultural, legislative and geographical differences and of undertaking continuous measurement. There are many reasons, sometimes differing between nationalities, which affect what tourists want from a particular destination. Each group of customers might have a different set of expectations, needs and wants as a reflection of their culture. Destination benchmarking has to find a unique solution for this issue. There may be no major problem for measures such as the level of language communication or the availability of facilities; but there may be differences between how two different nationalities perceive the overall cleanliness and the level of prices? It may appear easy to learn how people perceive destinations by employing attributes, however the selection of appropriate attributes which can be used to measure the performance of destinations, then be used to compare findings and finally decide what can be achieved and how it can be changed is highly complex. For instance, people can perceive climate, culture or natural environment in one destination better or worse than in another. This does not mean that such attributes could be considered as benchmark elements as these are unique dimensions in each different destination and it is impossible to change them in the short run or even in the long run; but each destination can emphasise its unique resources.

4. **Demand-based Features:** The different holiday-taking behaviour of two nationalities could influence the findings of comparative surveys. In other words, measuring the extent of tourists' first-hand experiences with several facilities, activities and services is limited in a cross-cultural comparison study as well as in a destination benchmarking study. One group stays in a hotel with full-board while another stays in a self-catering apartment. One has to use the hotel restaurant; another has to choose a restaurant outside or prepare something themselves. Or the two groups take holidays of different lengths. Or one group has more repeat visits than another. One might speculate that the level of tourists' satisfaction may be coloured by their past experiences and, as a result, either higher or lower satisfaction scores might appear in comparison with those of first-time tourists (Crompton and Love 1995). Past research confirmed that repeat customers are more likely than first-time customers to be satisfied (Westbrook and Newman 1978). For instance, it is not reasonable to expect that both groups in this study had experiences of the same depth or extent. This point therefore needs a considerable amount of attention in future research.

5. **Accommodation Facilities and Services:** Although this study attempts to analyse the types of accommodation available and their performance levels based on research findings, attention should be paid to the type of accommodation and holidays tourists prefer to buy. For instance, in this study, one quarter of German people stayed in apartments in Mallorca as opposed to a small minority in holiday villages. These are two extremes of accommodation. Of German tourists, a quarter preferred all-inclusive holidays in Turkey. In comparison with those in Turkey, British tourists in Mallorca preferred to choose half-board holidays. All these findings may signal an imbalance or unequal distribution of tourist experiences or observations regarding where they stayed. One group takes full advantage of the services on offer while another chooses to be as independent as possible. From these findings, one could speculate that the usefulness of benchmarking for the performance of accom-

modation services and other directly-related facilities and services such as individual restaurants in two destinations would be limited.

6. **Process Benchmarking:** Presenting outcome measures such as the number of tourists, tourism income, distribution of tourist expenditure and level of satisfaction, performance measurement has a wider coverage than process benchmarking in this study. Future research could be recommended to focus further on applying solely process benchmarking which aims to investigate operating systems, e.g. length of time to serve waiting customers, methods to keep beaches, sea and footpaths clean or reasons for high or low prices. As the domain of inquiry here concerned mostly the analysis of quantitative and statistical data, future research could be directed at a sample of qualitative data such as designing interview and focus group surveys with both customers and suppliers for activating process benchmarking. Benchmarking is not only related to the satisfaction levels of external customers but also that of internal customers including local residents, employees, tourism businesses and associations because these are affected by a destination's performance at different levels (Kotler *et al.* 1993; Atkinson *et al.* 1997). Further research should therefore focus on how to involve these groups in destination benchmarking and may extend the body of knowledge in designing a broader destination benchmarking model.

7. **Tour Operators:** Tour operators have an enormous power in marketing destinations in mass tourism even though the degree of dependence on the tour operator may vary from one destination to another depending on the amount of revenue. The prime purpose of tour operators is to create customer loyalty to themselves rather than to destinations they promote (Carey, Gountas and Gilbert 1997). Hence, it could be claimed that tour operators are the only group able to reduce or increase the volume of tourism demand, not the destinations themselves. The image of a destination may be primarily affected by the tour operator's promotional activities in the tourist generating-country (Goo-

dall 1990). This provides further insight into the involvement of tour operators in benchmarking mass tourist destinations.

8. **Determinants of Consumer Behaviour:** It is important to bear in mind the existence of other non-satisfaction determinants affecting consumer behaviour (Oliver 1999). Overall perceptions of tourists may depend on external factors which are not manageable or controllable by destination management or local tourism businesses. These may be economic, political or temporal features appearing in tourist-generating countries and tourist destinations, i.e. age, income, occupation, personality, cost, time, motivation, distance, risk and existence of alternative destinations (Mill and Morrison 1992; Mountinho and Trimble 1991; Pyo, Uysal and McLellan 1991; Sonmez and Graefe 1998; Um and Crompton 1990). There are also some other uncontrollable external factors such as terrorism, spread of disease and natural disasters which may have a more powerful affect when they happen; but it may be difficult to predict the impact how these factors are likely to have on the tourism industry and control their consequences. It is extremely difficult for benchmarking studies to assess such factors. This leads to the link between quantitative and qualitative measures proposed in this study. Do satisfied customers really come back? Do they encourage their friends and relatives to visit the destination? Do high satisfaction scores or positive images increase tourism revenues in the future?

9. **Tourist Expenditure:** Although there may be no major problem in calculating the amount of spending for each category, it is necessary to examine possible reasons for differences in outlay between sample destinations. This study indicates that the calculation of spending on food and drink and its comparison creates some problems in the measurement of total tourist spending as it relies mostly on other factors such as the type of holiday and the number in the party. It is clear that prepaid parts of package holidays create several problems while measuring an accurate level of tourist expenditure at the destination. For instance, if a tourist books accommodation with full board, the problem here is to

find how the money spent on food and drink can be reflected in the tourist's actual holiday expenditure. This also applies to the attempt to measure such expenditure per person (tourist). It may not be reasonable to expect or anticipate that each person in a party spends an equal amount, e.g. adults and children at different ages or with different interests. This part of the study therefore needs further consideration.

11.5. Recommendations for Benchmarking in Practice

The application of destination benchmarking into practice comprises the following recommendations:

1. To achieve high standards it is necessary to control and co-ordinate a variety of activities undertaken by various organisations and local groups, such as accommodation, restaurants and bars, recreation and sports, shopping facilities and local people. It needs top-level organisation and teamwork to produce effective outcomes. This study therefore suggests launching a destination management department, either as a local committee or as a local council, where its director could be responsible for directing sources of tourism supply at the destination in order to serve customers better, evaluating customer needs and wants and carrying out destination-benchmarking research to benefit from its applications. One of the reasons why benchmarking exercises have been so slow to develop could be that destination management has yet to exist as a separate high-powered organisation.
2. Destination benchmarking could be a worthwhile proposed technique to view the position of any destination on a league table of performance results. Although there seems to be no major problem for quantitative measures, it is unlikely to identify criteria for qualitative performance measures for all destinations world-wide. Depending upon the features of the destination, each desti-

nation management needs to clarify its own attributes to be measured and standards to be expected whilst setting up benchmarking research. A similar technique could be used for specific types of destination offering similar products such as ski resorts, urban tourism centres or mass tourist bathing resorts.

3. Authorities could attempt to understand the factors that have the greatest effect on the performance level of their destinations (internal benchmarking), and then to make further improvements to maximise their overall performance. This may be achieved by establishing new future-based strategies either by examining other destinations (external benchmarking) or following the guidelines of some national and international grading schemes and awards (generic benchmarking).
4. Competition and customer satisfaction have a dynamic structure, so does benchmarking. A database could therefore be formed including qualitative and quantitative measures about different national and international tourist destinations and their performance levels or applications. Such international organisations as WTO or WTTC could be in charge of this. A specific database could also be formed to collect data about the destination itself containing trends in the industry in comparison with previous years. The sample of customers might differ in profile, needs and attitudes over time, either at different times of the year or from one year to another, so all these processes may be repeated over different periods of time. The Department of Tourism in the Balearic Islands has done this very effectively by constantly monitoring all aspects of tourism, and keeping the results available in the archive.
5. The findings of this research demonstrated that external benchmarking, if properly carried out and implemented, could help both the management and marketing of a destination despite the fact that it has several limitations. It could compare one destination to others, quantify differences and document why those differences exist. The application of external benchmarking requires a two-way process. While the host destination is able to learn from another's

best practices, implementation failures and problems, in return the partner is also given the opportunity to learn something from the host. This study proposes that national or international destinations must be aware of what others do, what features of destinations attract tourists and how likely these features are to be considered satisfactory. Destination authorities must review their own performance levels to bring about improvements in conjunction with developments, innovations in the travel and tourism industry and changes in consumer behaviour, needs and wants.

6. As a part of internal benchmarking, tourism businesses could benchmark themselves against their counterparts in the same destination. Internal benchmarking could be undertaken among hotels, restaurants and cafes to identify whether any gap exists in terms of providing a certain level of service. The same task could be undertaken in other destinations in the same country. Thus, this study suggests that each service experience be measured and counted just before or after it has taken place. For example, surveys could be conducted by each business such as hotels, restaurants, travel agents or museums individually among their own customers to investigate how well they are satisfied or if they are dissatisfied with the services offered and learn their likes and dislikes and their opinions on how to lessen the dissatisfaction.

7. Another recommendation must be that individual businesses at the destination could pass on to destination management their own customers' complaints as well as compliments. Complaints would encourage destination management to find better solutions for those who have similar problems. Similarly, compliments would be used to help those who want to improve their service standards and deal with their customers' complaints but who do not know how to do so. It is clear that both complaints and compliments could be sources of internal destination benchmarking, a type of benchmarking undertaken in a single destination. Along with the regular administration of questionnaire surveys, destination management could be advised to place comment boxes at hotels,

the destination airport or perhaps at museums, historical sites or even in the streets to maximise feedback in which customers can make suggestions or complain. Moreover, free customer hot lines could be established.

11.6. Summary and Review

As a method of seeking best practices by comparing one's own performance to others', the concept of benchmarking emerged in business management in the 1980s. It has been used to evaluate products, services and processes in a number of industries. This research takes the benchmarking approach a step further in a broader context. There are literally thousands of micro benchmarks that might apply to many individual elements of a destination such as accommodation establishments, food and beverage facilities, recreation and sports facilities and the destination airport, e.g. average time spent in cleaning a room, average time spent in providing a service for the customers, revenues or cost per guest. However, this research is an attempt to apply benchmarking to destinations only for broad functional areas such as accommodation, food and beverages, hospitality, physical environment and the destination airport. Some of their attributes, regarded as an element of qualitative measures, are overall cleanliness, attitude towards tourists, overall value for money and so on. There are also various quantitative measures which can be useful either while conducting a benchmarking study or evaluating its performance.

Within this research, all the mainstream approaches to benchmarking have been reviewed; namely internal, external, generic, functional and competitive. Three types of benchmarking have been adapted to destination benchmarking: internal, external and generic. Although generic benchmarking has been introduced to measure one's own performance using several national or international quality or eco-label standards and to follow these guidelines to accelerate improvement, it has not been empirically tested in this research due to constraints of time and the difficulty of getting access to data (Objective 1).

With the objective of evaluating the relevance of the benchmarking method to international tourist destinations, and their development and management, this research has proposed a model based upon an extensive review of the literature both in the fields of benchmarking and tourism. Both qualitative and quantitative measures were revised to operationalise internal and external destination benchmarking procedures. Internal benchmarking aimed at measuring the internal performance of destinations by analysing the impact of individual attributes on tourist satisfaction and future behaviour and repeat tourists' perceptions of changes compared to preceding years. Some quantitative measures were also evaluated in the context of comparison to past years and national economic figures. External benchmarking sought to investigate in what respect one destination was more competitive or was performing better than others using self-generated data on tourist satisfaction, motivation and expenditure scores and statistical figures (Objective 2).

The proposed model was tested by collecting and analysing the primary and secondary data. As for the operationalisation of qualitative measures, three different questionnaires were developed. The primary data were collected from British and German tourists visiting Mallorca and Turkey in the summer of 1998, administering a self-completion survey. These surveys were analysed using content analysis and a series of statistical procedures which were available for self-assessment and comparison research such as chi-square, mean difference (t-test), factor analysis and multiple regression. The secondary data were also collected and personal observations recorded (Objective 3).

The analysis of findings based upon the operationalisation of both internal and external benchmarking approaches demonstrated several areas where one destination has its strengths as well as weaknesses and also where it is stronger or weaker than another, e.g. hospitality and customer care, level of prices and local transportation in Turkey, and airport facilities and services in Mallorca. On the basis of the context of internal and external benchmarking, recommendations were also provided on possible ways to improve them (Objective 4).

In line with the outcomes of the research and observations, the model was revisited and its utility for destination management and marketing was assessed specifying the strengths and weaknesses of each approach. Some slight modifications should be taken into consideration. For instance, benchmarking should be regarded as a learning experience rather than a copying activity. Moreover, benchmarking is not only a management approach but also directly influences marketing strategies. Therefore, qualitative and quantitative measures must be interrelated as any change in the former is expected to have an impact on the latter (Objective 5).

Finally, referring back to the outcomes of the research, a number of recommendations were made both to researchers and practitioners regarding the theoretical and practical applications of destination benchmarking in the future (Objectives 6 and 7).

To conclude, tourism and hospitality benchmarking is still in its infancy and there are also some deficiencies in earlier benchmarking studies. Therefore, this study has the potential to draw several significant theoretical and practical implications. From the theoretical point of view, the contribution of this study's findings exists in the methods and techniques used to identify the factors influencing selected destination performance variables and in the methods to be employed for comparison between the two destinations. The analysis of these findings could be helpful for indicating the way in which the existing benchmarking approach could be adapted to tourist destinations and areas where there are weaknesses to be considered. From the practical point of view, the analysis of these findings might be helpful for pointing out the level of competitiveness, attributes in which destinations need to be improved and positioning strategies each destination has to establish by following the guidelines of either internal or external benchmarking. Benchmarking, if properly implemented, could help the management of a destination by comparing itself either to its earlier performance levels or to other destinations so as to learn from their past or current practices. This research also makes a substantial contribution to knowledge through gaining knowledge of performance in Turkey com-

pared with Mallorca and the reasons for any difference, and implications for the further development of tourism in both destinations.

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APPENDIX A:

**OVERVIEW OF TOURISM DEVELOPMENT
IN TURKEY AND MALLORCA**

1. Overview of Tourism Development in Turkey

Turkey, as an emerging market in the international economy, is amongst the most prosperous countries in terms of development in the Middle East (Ali 1999). It opened its door for international economy in the early 1980s and is still in the stage of economic integration in the world economy. Turkey has a 780,000 square kilometres of land and is surrounded by 8,000 kilometres of coastline. The major economic indicators of Turkey are presented in Table. There has been an increase in the GNP per capita and GNP overall. Import expenses exceed export earnings. The share of the service industry in the GNP is increasing (10.1% in 1997).

Table 1: Major Economic Indicators of Turkey (1997)

Gross National Product	Million US\$ 194,305
Gross National Product (Per Capita)	US\$ 3,048
Export	Million US\$ 26,249
Import	Million US\$ 48,657
Service industry	Million US\$ 19,373
Unemployment Rate	10.2 %
Labour Force	20.9 million
Land	780,000 square kilometres
Coastline	8,000 kilometres

Source: World Tourism Organisation, Madrid.

Tourism has played and is still playing a major role in Turkey's social and economic development. The history of tourism development dates back to the 1930s, just after the Republic of Turkey had been established in 1923. Tourism had been incorporated into the government bodies with a certain status before achieving the status of a separate ministry in 1963. In 1934, a small tourism office was officially founded as a part of the Ministry of Economy. Due to the great significance of tourism in the country the Ministry of Tourism was established in 1963. The Ministry of Tourism is accepted as a top organisation, representing the industry with regards to state policy and planning, of which aims are to provide co-ordination and consultancy amongst the tourism establishments operating in the country. Among its responsibilities are planning, certification and controlling of tourism investments and facilities, training of personnel, certification of tour guides and determination and endorsement of room rates. Some of these responsibilities are ex-

pected to be transferred to other institutions in the future. The Ministry is currently involved in several tourism agreements with other governments and international organisations. Main service units formed are the General Directorate of Investments, General Directorate of Promotion, General Directorate of Establishments, General Directorate of Tourism Education, and the Department of Foreign Affairs. The Ministry carries out work with its 143 local bodies in the country and 23 promotion consultant organisations abroad.

The tourism development in the country is assessed in three stages: awareness stage (1955-1970), advocacy stage (1970-1982) and action stage (1980 to present) (Korzay 1994). In the awareness stage, an effort was made to promote the benefits of tourism in the eyes of local people. The basic tourism strategies were directed towards mass tourism, coastal tourism and large scale investments during the period. In the advocacy stage, the lack of policies, strategies and financial sources was realised and priority was given to them. The responsibility of regional tourism planning was transferred to the Ministry of Tourism in the 1970s. It is also important to emphasise that internal political turmoil and economic unsustainability were the main barriers over the development of the national economy during these two periods.

In the last (action) stage, significant developments were achieved, both with the financial and morale support given by the public sector. Though the government made its own investments in tourism from the 1960s, it began handing them over to the private sector in the late 1980s as the tourism industry proved its profitability. After handing over the power to civil political parties in 1983 and releasing the Tourism Encouragement Law and the Foreign Investment Law, civil government started to encourage the involvement of the tourism industry in the country by providing generous incentives and encouraging foreign investors to invest in tourism. Among the benefits of these incentives were the allocation of public land on a long term leasing basis, of 49 or 99 years, grants reaching 40% of total investment cost, low interest loans, several tax exemptions and import facilitation. In collaboration

with foreign investors, the private industry moved on large scale into the tourism market. Investment incentives remained in practice but not to the same extent as previous years.

Unfortunately, some owners and investors made investments only for yielding short-term benefits and exploited resources in a non-sustainable and a irresponsible way, e.g. charging double prices for foreign tourists and speculative buying and selling of land and accommodation and other tourism facilities. The authority of regional planning was given back to the local administrations in that period. In this period, a rapid growth rate in both demand and supply sides (tourist arrivals and accommodation capacity) was experienced without presenting any proper planning programmes.

1.1. Overview of Tourism Planning in Turkey

The government claims that privatisation, decentralisation, well-balanced tourism development in the selected regions, gaining contribution of all bodies to planning, competitiveness, productivity and sustainable tourism development are amongst the priorities of the tourism industry in the country (Ates 1993). Therefore, the public and private industry representatives tend to work in a collaborative and co-operative network more than ever before for developing such projects as marketing, training of personnel, modernisation of existing facilities and diversification of supply and environmental protection.

Tourism has therefore become a major focus of the National Five-year Development Plan, compiled by the Institute of State Planning (DPT), which establishes goals, policy and practices regarding all sectors of the national economy. Some of the principals of the Seventh National Five-year Development Plan regarding tourism development from 1995 to 1999 have been set as follows (DPT 1994):

- ◆ Natural assets will be protected and sustainable tourism development encouraged. Eco-tourism promotion projects will be carried out as a means of achieving the diversification of tourist markets in Turkey.
- ◆ Efforts will be made to improve the seasonal and geographical distribution of tourism and develop new potential types of tourism activities such as golf, winter sports, health activities, yachting, caravanning, cruises, and mountain and congress tourism.
- ◆ Arrangements will be made for the fast implementation of the Mediterranean and Aegean Tourism Infrastructure and Coastal Management (ATAK).
- ◆ The number of local tour operators will be increased, the private industry is encouraged to financially contribute to promotion and marketing abroad. In this context, marketing and promotion efforts will be expanded to include tourism demand in the US and Japan.
- ◆ The establishment and upgrading of terminal facilities and services in airports will be provided.
- ◆ Priority will be given to the development of small-scale establishments.
- ◆ Priority will be given to the training of personnel working in the tourism and hospitality industry. Therefore, a certification system will be adopted to increase the level of existing service quality in the industry.

However, to date, the lack of general planning and co-ordination amongst the bodies has been one of the major problems in tourism. Top-down planning and communication methods are in practice in Turkey, where the central government has the power to set goals, take decisions and implement them. In some cases, local municipalities are allowed to take their own decisions, provided that they have

the necessary endorsement from the related bodies to the central government. As a result, Turkey has produced an undifferentiated marketing strategy which aims to attract as many tourists or excursionists as possible and increase tourism revenues.

1.2. Analysis of Efforts to Diversifying Tourism Products in Turkey

As a part of its geographic location, Turkey's potential tourism products are beaches, yachting, culture and history, mountains and winter sports, thermal tourism and natural history and beauty. Nevertheless, Turkey concentrated on mass tourism beginning from the mid-1980s, as stated earlier, paying attention to the development of tourist resorts on the coast. Until recently, seaside vacations on the Mediterranean and Aegean coasts had been emphasised. It is speculated that nearly 50% of total tourism receipts are yielded from coastal tourism based on the Mediterranean and the Aegean resorts (The Times 1997b).

It has been now realised that other types of tourism such as heritage, activity, health and nature-based (ecotourism) should be encouraged and promoted. Among the proposed alternative forms of tourism products are thermal and health, religion, culture, physical recreation, air ballooning, hunting, golf-tourism, winter sports, camping and caravanning. Some of these are still in infancy. Neyisci (1999) claims that Turkey is unable to use its natural and social resources in tourism in an efficient and effective manner despite the fact that it has a great potential. He suggests that Turkey has to change its tourism product from coastal tourism to ecotourism if up-market tourist groups are to be attracted. The government is reconsidering its tourism marketing and promotional activities and may exchange Turkey's image as a cheap Mediterranean tourism destination and attract upmarket tourism by providing new differentiated tourism products (Brotherton and Himmetoglu 1997). Similarly, on the supply side, the government needs to revise its existing tourism policies and objectives such as incentives and the balance between the size of accommodation establishments and upgrade infrastructure such as airport services and roads.

The geographical situation and historical background make Turkey the country where four seasons occur in the same day. For instance, Istanbul, with its five-star and luxury hotel establishments providing high standards of services and telecommunication technology, has great potential to serve culture, business and sport tourism (Etter 1995). Similarly, Antalya, down to the south, has recently been promoted as an off-season holiday destination for senior tourism as well as for incentive, congress and sport tourism activities.

It has been proposed that traditional seaside tourism should be linked with inland tourism, based on the rich culture and natural landscape of the latter. Among the objectives of tourism authorities are to expand tourism throughout the country and away from concentration on the Mediterranean and Aegean coasts, promote the off-peak season holidays and develop alternative types of tourism such as culture tourism, mountain (trekking) and winter tourism, hot springs and thermal tourism, golf tourism, faith tourism and yacht tourism. With its archaeological remains, traditional lifestyle in rural settings and museums, Turkey has also an objective to capture the interest of foreign upmarket tourists by putting the 'Historical Silk Road Project' into action. Turkey has plenty to offer both in mountain (trekking) and winter tourism, with its several mountains and skiing centres. The country is amongst the best seven countries of the world in terms of hot spring resources. Moreover, the climate on the Mediterranean and Aegean coastal zones is suitable for playing golf all year round. As golf tourism is considered as part of 'green tourism' or 'soft tourism', it can contribute to environmental protection too. Turkey can take place in attracting such a rapidly growing market. There are some places in Turkey such as Istanbul, Ephesus, Demre and Antakya which attract the attention of Christianity.

Finally, Turkey, surrounded by seas from three edges, has a great potential to emphasise yacht tourism as a main product. To realise these objectives, the Ministry of tourism has targeted extensive areas of the Black Sea, eastern Anatolia and south-eastern Anatolia regions for tourism development and plans to provide the

infrastructure required by the tourism industry. In addition, there are also some other efforts made by private tourism enterprises in order to promote Turkey as a combination of both a marina and a shopping tourism destination and make it cost-effective. The emergence of the eastern European market has resulted in a boom in the number of arrivals for shopping and this is reflected by the increased share in total tourism incomes of these countries in the recent years.

1.3. Overview of Major Problems in the Tourism Industry of Turkey

Some of the reasons for unsustainable tourism development in Turkey have been pointed out as follows (Tosun 1998): Tourism policy (encouragement of tourism supply rather than tourism demand), economic policy, political unsustainability and unrest, rapid emergence of mass tourism, misuse and loss of financial credits and government subsidiaries, promotion of the country as a destination primarily based on sea, sun and sand, unequal distribution of small, medium and large scale accommodation establishments, lack of required skills for entrepreneurs, dependence of tourism on international tour operators and unawareness of preserving the environmental quality of tourist destinations. Korzay (1994) further suggests the existence of other effective factors such as the negative image created by the media abroad, terrorism, resistance to developing effective marketing strategies which are compatible with other countries, and limited diversification of the tourism product.

Real figures in tourism do not correspond with those estimated in the development plans due to economic, social and political unrest in the country. Despite the fact that all intentions, promises and efforts are to establish a sustainable and well-balanced tourism industry in the country, the figures and realities fail to support them. To give a most recent example, 1999 was one of the worst seasons in the country's records. Due to unstable economic and political development and over-dependance on tour operators, a sharp decrease in the number of foreign tourist arrivals was recorded. As a result, prices sharply decreased and the industry allocated its efforts to attract domestic tourists.

Turkey is experiencing some major problems concerning setting policies and stimulating tourism growth in the international level since all tasks are given to the central government. This creates bureaucratic problems and delays in making efficient decisions. However, some other countries such as Italy, Spain and the UK where local government bodies and their collaboration with the private sector is more powerful in directing the industry are becoming more competitive in the market. A commercial overdependence on foreign tour operators and their pressures to keep prices low have decapitalised some businesses and forced them to deal only with tourist groups with the lowest purchasing power.

As known, mass tourism brings socio-cultural and environmental problems in society and has little influence on the economic prosperity of the host country (Debate on Tourism, 5.12.1999, BBC1). The rapid development of mass tourism in Turkey has resulted in the degradation of cultural and natural resources (Cooper and Ozdil 1992). Tourist employment in Turkey has a seasonal and geographical concentration leads to the abandoning of traditional productive sectors such as agriculture. The transfer of the working population to the tourist resorts such as from Kusadasi to Alanya has resulted in dramatic population increases in southern and south-western coastal areas in the last 15 years. Due to the growth of tourism in such places, problems can occur such as esthetical degradation and increased negative consequences for environment. As a consequence of overdevelopment in mass tourism based on coastal areas, high buildings such as hotels and private apartments on the seashore replaced the local architecture, resulting in irreplaceable loss of architectural heritage. Motorways were placed too close to shoreline and even beaches. In such tourist resorts, hotels and other tourist facilities send their sewage directly into the sea. According to the results of research conducted more recently (Cumhuriyet, 26.10.1998), 76% of the coastal regions did not have any wastewater treatment system, and raw sewage was directly sent into the ground instead.

In addition to developments in domestic and international tourism, the construction of summer houses, forest fires and industrial disposals have removed natural resources in the coastal areas. A shortage in water and electricity supply has appeared. Uncontrollable development, legal conflicts between local governments and central government, misuse of regional and land-use plans and legal discrepancies are the causes of such environmental problems. The Ministry of Tourism is working in collaboration with the Ministry of Environment and the Maritime Undersecretariat in order to come up with efficient projects for environmental protection and be able to put them into action. In this context, since 1989 the Ministry of Tourism has spent 536 million Japan Yen in order to upgrade the infrastructure of the Mediterranean and the Aegean coastal resorts through a comprehensive project, called the Mediterranean and Aegean Tourism Infrastructure and Coastal Management Project (ATAK). Covering 4,000 km of coastline and about 100 towns and villages on the Mediterranean and Aegean coasts, the project aims to remedy infrastructure concerning water supply, waste water, solid waste collection and disposal and define the context of coastal management.

Environmentalists urged the government that some places on the south-western side of the country, e.g. Fethiye, a well dominated tourist resort on the south-western coast, are in risk of suffering erosion resulting from unplanned tourism development, uncontrolled clearing and infrastructure construction such as marinas and roads. It is claimed that, to some extent, coastal zones of such places are being spoilt by soil washed down from the mountains. This could leave the beaches unsuitable as tourist attractions unless solutions are shortly presented.

Tourism represents a very important part of a country's national economy and it needs links with other key economic sectors such as transport and construction. This helps to ensure that growth in tourism is seen as an integral part of a country's economic development (Keller 1997). There is a wide network of local and national roads, but insufficient motorways and highways to meet the needs of tourist resorts in Turkey. This is particularly evident during the summer months

where there is an increase in traffic due to tourism. As a result, the number of traffic accidents has been in an upward trend over the past decade. As a core part of a tourism marketing system, a country should be accessible and have airports in good conditions, but the small size of airports and the lack of internal flights linking to international flights remain major obstacles to the further development of tourism in Turkey.

Several seaside resorts in Turkey already face difficulties in coping with the increased number of foreign tourist arrivals. The destination lifecycle model introduced by Butler (1980) suggests that destinations change from introduction to decline as time goes by. According to Butler's theory, these resorts on the Mediterranean and the Aegean coasts in Turkey are now experiencing somewhere between *development* and *consolidation stages* since:

- ◆ The number of arrivals is increasing rapidly. Foreign tourists have become a target for making profits (development stage - Butler 1980).
- ◆ The number of foreign and domestic tourists at peak seasons in some resorts equals or exceeds the number of local people, e.g. Bodrum, Marmaris, Kusadasi and Alanya (consolidation stage - Cooper and Jackson 1989).
- ◆ Outsiders (either from other parts of Turkey or abroad) have begun to invest financial resources in tourism within the area (development stage - Cooper and Jackson 1989).
- ◆ Control of overdevelopment in tourism has declined. There is an increasing need for regional and national tourism planning and control (development stage - Cooper and Jackson 1989).
- ◆ Natural and cultural resources are directly marketed to foreign tourists (environmental degradation)

- ◆ Local economy in some places is largely dominated by tourism. This brings overdependence on tourism development.
- ◆ The volume of psychocentric tourists who prefer mostly inclusive tours or package holidays attracted to the area has become larger than those of allocentric tourists.

2. Overview of Tourism Development in Mallorca

Spain is a country which plays an important role in world tourism activity, both as a tourist receiving and a tourist generating country. Spain is an established and mature tourist destination. For the first time, Spain overtook the United States in 1995 as the second most important destination after France, in terms of international tourism receipts. It witnessed an increase in tourism receipts of 12.17% in 1996 compared to 1995 (WTO 1997).

As an important part of the Spanish territory in tourism, the Balearic Islands are located in the western Mediterranean Sea, approximately 90 kilometres east of the Spanish mainland. Table 2 shows the major economic indicators of the Balearic Islands. The export of goods and services, excluding tourism, totalled 633 million US\$ as opposed to 1,068 million US\$ for imports, with a deficit balance of 435 million US\$. The service industry generates 83% of the total GNP figures.

Table 2: Major Economic Indicators of Balearic Islands

Gross Domestic Product ^a	Million Us\$ 14,305
Gross Domestic Product (Per capita) ^a	US\$ 18,593
Export ^a	Thousand US\$ 633,332
Import ^a	Thousand US\$ 1,068,610
Service Industry ^b	Million US\$ 11,165
Unemployment Rate ^b	11.60 %
Labour Force ^b	Approximately 312,900
Land	5,000 square kilometres
Coastline	1,240 kilometres

a refers to 1997; b refers to 1996.

Source: Ministerio de Economia Y Hacienda Direccion Territorial de Comercio en Illes Balears.

Note: Figures in US\$ were calculated by the researcher.

With 3,640 square kilometres, Mallorca is the largest part of the Balearic Islands which cover 5,000 square kilometres land and 1,240 kilometres of coastline. Constituting the driving force of the national economy, tourism is the most significant generator of employment and foreign currency for Mallorca. Tourism receipts generate about 34% of the island's GNP. The boom in Mallorca has given the island more economic freedom. However, Mallorca began losing its popularity at the end of the 1980s as a result of falling standards, attracting new Mediterranean (e.g. Cyprus, Turkey and Greece) as well exotic and long-haul tourism destinations (e.g. Caribbean) into the market. Even though the volume of arrivals did not decline significantly, it could be speculated that the tourism industry in Mallorca experienced *stagnation* stage of the destination life-cycle model in that period since tourism carrying capacity was reached.

2.1. Overview of Tourism Planning in Mallorca

The Balearic Parliament forms the central organ of the autonomous institutional system. Mallorca is therefore represented with a self-governing community that has been given the responsibility of regulating tourism businesses and activities, inspecting and supervising them and developing their own promotion campaigns, locally and abroad. Local authorities are now in an attempt to renovate and revitalise the attractiveness of Mallorca amongst both its existing tourism demand and potential markets. Though there was no effective tourism planning approach in the 1960s, a structured and controlled tourism policy including the reintroduction of land use policies is now put into practice (Hunter-Jones et al. 1997). From the middle of the 1980s onwards, several policies as well as laws (Law on Planning and Protecting Natural Areas of Special Interest in 1984 and Law on Conservation of Natural Areas of Landscape Interest in 1991) were released in order to reshape the image and increase the environmental quality of the destination, e.g. design of natural environment and traffic congestion. The first policy limited the use of land to add extra accommodation beds. The next was to encourage the modernisation

of existing accommodation facilities to raise the quality of tourist resort areas and preserve nearly 30% of the total landscape on the island (Bruce and Serra 1996).

The quality of services is the primary purpose of the local government's tourism policy. It has recently introduced the Plan Q (Quality Tourism Supply Plan) which aims to improve not only the product but also service levels and the environment (Ibatur 1996).

The improvement of the product stage primarily focuses on the modernisation of existing accommodation establishments and bringing standards for the construction of new ones. It considers the regeneration of accommodation infrastructure which was built before 1984 and needs further technical improvement. The purpose is to adapt them into new quality standards. In total, 1,200 accommodation establishments with their 200,000 bed capacity are affected. The inspection process covers details about safety matters, fire prevention, quality of services, furnishings and food safety regulations. Those establishments which are renewed within the near future will be forced to leave the market. Further stages of this plan aim to improve tourist resorts by limiting their uncontrolled development. Some old buildings are therefore replaced by new green zones. It also requires tourism facilities to use the supply of water and energy and treat the environment responsibly. In this context, the construction of new buildings is limited by standard to a minimum of four-stars with a maximum high of three stories and only 30 square metres of land per user (Morgan 1991). Foreign tour operators collaborated with the project by investing a large amount of financial resources to upgrade the physical and service quality standards of several accommodation establishments in Mallorca, e.g. Thomsons. The supervision was conducted with specific guidelines covering food, facilities, entertainment, room decor and staff service (Morgan 1991). Such tour operators have enormous bargaining power to encourage tourism establishments to increase their awareness of the environmental quality at the destination (Hjalager 1998).

The second stage of the plan aims to preserve landscape, historic and cultural values. In this context, all waste water is purified before it is sent directly into the sea. All pedestrian areas, squares, green belt areas, urban elements and lighting are improved. The sea-front area is cleaned and regenerated, the levels of hygiene and sanitation standards have been improved to reduce the pollution of the sea and beaches. Within the context of the regeneration of Mallorca, the municipality of Calvia has adopted the Local Agenda 21 investing £75 million in resort development for reaching objectives such as the five Rs of 'reduce, recover, return, reuse and recycle' (<http://www.wttc.org>). The last stage requires the professional level of tourism staff to be raised by using such strategies as university-level tourism training programmes.

2.2. Overview of Efforts to Diversifying Tourism Products in Mallorca

As it is likely that Mallorca is in the stagnation stage of tourism development and about to begin some kind of decline, it needs to take action towards the rejuvenation of sales by undertaking product diversification in new forms of holiday-making and tourism, away from mass tourism and towards new products and market niches. Competitiveness of Mallorca will become weaker due to the appearance of new Mediterranean destinations with similar products but lower prices unless product differentiation and diversification is put into practice soon (Bruce and Serra 1996). The objectives are to develop alternative tourism products to improve image, spread seasonality and diversify tourism products such as cultural and sport tourism. An attempt is being made to market the island to other nation states other than just the UK and Germany. The Netherlands, Switzerland, Scandinavia and the eastern European countries have been targeted for particular attention. Another strategy is to expand the season to winter time by attracting the elderly tourist groups (Bull 1994). Although it seems to be that Mallorca is attractive for mostly summer vacation, it appears to be gradually becoming a year-round destination, having courted the retiree market both from mainland Spain and abroad in winter season. Both the amount and the diversity of sport facilities and activities are sig-

nificantly increasing. As known, the first golf courses were opened in 1964 and 1967. Tourists are now provided a wide range of facilities to enjoy watersports (e.g. sailing, windsurfing, diving, canoeing) and leisure sports (e.g. cycling, mountaineering, climbing and hunting).

2.3. Overview of Major Problems in the Tourism Industry of Mallorca

Small island destinations such as the Balearic Islands (or Mallorca) find there are both pros and cons of tourism development with regards to the prosperity of their local economies (Carlsen 1999). They are attractive destinations with their beaches, sealife, scenic beauty and sunny climates. On the other hand, they face the problem of the stress placed upon the natural environment, e.g. limited availability of land and water supply, biodiversity, marine resources and loss of agricultural land. As a result, tourism can have both positive and negative impacts in the area (McIntyre 1993). Development in tourism can create jobs, income and infrastructure opportunities. However, the carrying capacity of the infrastructure can be exceeded very quickly as it is limited and needs large amounts of investment to develop at the necessary rate. For instance, a shortage of water supply in the summer time is a common problem in Mallorca (The Times 1995).

As a consequence of the emergence of mass tourism, Mallorca has experienced a high volume of tourists, but with a low level of tourism income. Tour operators forced accommodation facilities to decrease their room rates, resulting in loss of financial means to upgrade the standards of their facilities even though the number of foreign arrivals increased. Accommodation capacity was extended and widened to other unspoilt areas causing environmental deterioration (Laws 1995). Problems facing Mallorcan tourism in the beginning of 1990s were the perceived images such as overcommercialised, overcrowded and noisy, overdependence on the British and German markets, yielding low receipts with higher volume of arrivals, environmental degradation (construction of hotel establishments very close to the beach

and to the unspoiled areas) and exceeding supply capacity of accommodation in the one- and three-star categories (Morgan 1991).

Mallorca, as an island tourist destination, is in the mature stage of its life-cycle and needs to refresh its appeal and re-establish its market position to avoid the possibility of decline (Ryan 1995b). Therefore, it has faced several problems. The most serious problem is the high concentration of both domestic and foreign tourist arrivals during the summer months. Palma de Mallorca has the highest volume of air traffic in Europe in summer. About 60% of tourist arrival are concentrated in the four months of June, July, August and September. As a result of selling beds cheaply and the increase in tour operator-driven tourism demand, beach-carrying capacities were exceeded by the mid-1980s.

Overall, in accordance with the discussion given above, one can speculate that some resorts in Mallorca are now experiencing Butler's *consolidation* and *stagnation stages* at the same time (Butler 1980). The evidence for this statement is as follows:

- ◆ The percent of increase in the number of foreign arrivals declines as total numbers continue to increase. Mallorca hosts about six million foreign visitors per year which is as almost ten times more than the number of its own citizens.
- ◆ Generating one-third of GNP and the vast majority of the export earnings, local economy is dominated largely by tourism incomes.
- ◆ Local people are likely to be exposed a large number of foreign tourists. The life quality of the local people is affected by creating environmental problems, traffic and parking problems as it is a very small island.

- ◆ The island is attracting a higher volume of psychocentric tourists (mass tourists) than allocentric tourists as a direct result of the popularity of organised mass tourism activities.
- ◆ The structure of tourism demand in Mallorca is heavily dependent on repeat business, e.g. over 5-6 visits by British and German tourists. The UK is one of only two key foreign markets for tourism to Mallorca. The other is Germany. This carries risks as Mallorca is over-dependent on these two major markets.
- ◆ The countryside is losing its originality due to the appearance of new buildings such as 'fincas' and rural buildings. The difficulty of control of waste disposal and noise pollution, the loss of natural spaces, flora and fauna, historic places and archaeological monuments have all become evident in the degradation of Mallorca as a well-established tourist destination.

As a consequence, as a part of long term planning the local authority has decided to revitalise the image of Mallorca, extend tourism to other seasons and attract 'niche market' customers including those travelling for conference and business reasons and sports such as walking, cycling, golf and yachting. In this respect, legislation has been introduced to tighten building controls and protect from further development. Investment in the product and tourist infrastructure is being made. The new Palma airport is an example of this. Old hotels and tourist facilities are destroyed, especially in Magaluf and Palma Nova, to create new places for gardens, landscaping and new resort facilities. Street furniture is being upgraded. Individual establishments are being provided grants to improve the quality of their signposting and presentation. More spaces are provided for cycle routes and pedestrianised areas. The local government empowerment and the collective action and partnership between local interest groups in Mallorca have been the major factor behind the success of the resort revitalisation. As Keller and Smeral (1997) point out, small destinations are able to organise themselves more effectively than

the larger ones as they have a homogeneous product and corporation and co-ordination between organisations is easier.

3. Analysis of Other Indicators of Tourism Industry

Developments in tourism encouraged the improvement of the transport system infrastructure such as motorways and marinas. There are 41 marinas in Mallorca. Rail transport is rarely used. According to 1995 statistics, out of total number of foreign arrivals in Mallorca, 99% were carried by aircraft and 1% by boat. The extent to which air transport and the airport itself are important to the destination's success in the tourism industry is clear. Mallorca has an international brand-new airport serving over 14 million passengers per year. As of 1995, Palma de Mallorca was the eleventh busiest airport in Europe, in terms of passenger throughput (Buswell 1996) and was selected as the worst airport in terms of flight delays in 1999 (BBC 1, 3.12.1999).

There is an outstanding increase in applying for the use of the blue flag in Spain and its islands. In 1997, 360 beaches and 88 marinas were selected to have the right of flying such a flag all over Spain and its islands (<http://www.wttc.org>). As can be seen, Spain pays much attention to the application of the blue flag and is highly aware of issues relating to cleanliness and the protection of its natural environment. Care is taken not to spoil an area's environment through overdevelopment within tourist destinations. As for the number of blue flags given to the Balearic Islands, there were 63 as of 1998. Specifically, Mallorca has 43 blue flags.

Despite the seasonality problems, low level of income compared to the number of visitors and low levels of service quality due to the lack of knowledge and motivation to follow current international improvements, the Turkish tourism industry has become one of the major sources of direct and indirect employment opportunities in the national economy. The high level of labour turnover due to seasonality problems makes it hardly possible to calculate accurately the number of employees

working in tourism. According to the WTTC statistics, it is estimated that tourism in Turkey employs 15.8% of the total active population (WTTC 1999). Its contribution to employment should be expected to be much more when direct (primary) and indirect (secondary) effects are considered together. It is expected to create more job potential when the bed capacity under construction is put into operation.

The type of transport used is mainly airlines. The development of inclusive charter flights has been a significant factor in the growth of air transportation. 24.2% of tourists arrived by air in 1980, 47.5% in 1990 and 72.5% in 1997. The proportion of those who arrive in Turkey by railways and sealines is decreasing considerably (<http://www.tursab.org.tr>). As of the early 2000, there are 15 marinas with a capacity of 3,784 yachts in service. This figure will be increased by an additional ten marinas which are still under construction.

As an indicator of environmentally friendly facilities and services, a 'blue flag' symbol is awarded to clean beaches and marinas, an 'anchor' to successful marinas, a 'dolphin' to yachts and a 'pine tree' to accommodation facilities (Ministry of Tourism 1995 Report). The blue flag was launched in Turkey in 1993 by the Foundation for Environmental Education (TURCEV). By 1996, seven marinas and fifteen beaches had the flag. As of December 1998, this number has risen to 11 for marinas and 64 for beaches. Water quality has become the key issue within its application. TURCEV aims to increase the environmental awareness of communities and tourists.

As for the comparison between Mallorca and Turkey, direct access is available to both destinations via both sealines and airlines. The majority of arrivals via airlines is represented by charter flights. Cruising and yachting are the main reasons for using sealines. In addition, a growing proportion of visitors from neighbouring countries prefer to travel to Turkey by motorways. Turkey has more blue flags than Mallorca. This finding is also related to the length of coastal area accessible as a measure for comparison. Turkey has a coastline six times longer than Mallorca's.



(Questionnaire 1)

Dear Guest,

This questionnaire has been prepared as a part of research project being undertaken at Sheffield Hallam University in order to investigate holiday experiences of foreign tourists visiting Turkey. The findings will be kept confidential and will only be used for academic purposes.

The questionnaire takes only a few minutes to complete and will provide very valuable information. If you think there is any question which seems not to be appropriate to you, you should skip it and move on to the next.

Thank you very much for your assistance.

PART I: ABOUT YOU AND YOUR HOLIDAY

1. Country of Residence: _____

2. Sex: male female

3. Age: 15-24 25 -34 35-44 45-54 55-64 65 and over

4. Occupation (If you are retired, please state it as 'retired'): _____

5. Which group best describes your annual household income? (in British Sterling)

<input type="checkbox"/> under 5,000	<input type="checkbox"/> 15,000-19,999	<input type="checkbox"/> 30,000-34,999	<input type="checkbox"/> 45,000-49,999
<input type="checkbox"/> 5,000-9,999	<input type="checkbox"/> 20,000-24,999	<input type="checkbox"/> 35,000-39,999	<input type="checkbox"/> 50,000-over
<input type="checkbox"/> 10,000-14,999	<input type="checkbox"/> 25,000-29,999	<input type="checkbox"/> 40,000-44,999	

6. Was your holiday?

<input type="checkbox"/> all inclusive	<input type="checkbox"/> half board	<input type="checkbox"/> self catering	<input type="checkbox"/> flight only
<input type="checkbox"/> full board	<input type="checkbox"/> bed and breakfast	<input type="checkbox"/> room only	

7. Length of holiday

<input type="checkbox"/> less than a week	<input type="checkbox"/> 8-13 nights	<input type="checkbox"/> 15-20 nights	<input type="checkbox"/> four weeks
<input type="checkbox"/> a week	<input type="checkbox"/> 14 nights	<input type="checkbox"/> 21 nights (three week)	<input type="checkbox"/> more

8. How far in advance did you book your holiday?

<input type="checkbox"/> less than a week	<input type="checkbox"/> 1-4 weeks	<input type="checkbox"/> 1-3 months	<input type="checkbox"/> 4-6 months	<input type="checkbox"/> 7 months and over
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9. Type of accommodation used

<input type="checkbox"/> hotel	<input type="checkbox"/> apartment (apart hotel)	<input type="checkbox"/> holiday village	<input type="checkbox"/> other (specify):
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10. The name of holiday resort you visited on this occasion?: _____

1. Was this resort the first on your choice list?: yes no

2. Excluding this trip, how many times have you been to Turkey before?

<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6 or more
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3. Excluding this trip, how many times have you been to this resort before?

<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6 or more
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14. Please tell us the three most important things that you took into account while selecting this destination.

1.	2.	3.
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PART II. MOTIVATIONS

Please tick the most appropriate box for each question taking into consideration how important it was to you while choosing to holiday in Turkey. If you think there is any question which seems not to be very much appropriate to you, you should skip it and move on to the next.

15. I came to Turkey to relax

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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16. I came to Turkey to be emotionally and physically refreshed

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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17. I came to Turkey to get away from home

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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18. I came to Turkey to visit historical and cultural sites

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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19. I came to Turkey to seek adventure

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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20. I came to Turkey to engage in sports

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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21. I came to Turkey to get close to nature

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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22. I came to Turkey to have fun

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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23. I came to Turkey to be active

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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24. I came to Turkey to meet local people

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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25. I came to Turkey to increase my knowledge of new places

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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26. I came to Turkey to holiday / spend time with people I care deeply about

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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27. I came to Turkey to mix with fellow tourists

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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28. I came to Turkey to enjoy good weather

<input type="checkbox"/> extremely important	<input type="checkbox"/> very important	<input type="checkbox"/> slightly important	<input type="checkbox"/> neither important nor unimportant	<input type="checkbox"/> slightly unimportant	<input type="checkbox"/> very unimportant	<input type="checkbox"/> not important at all
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PART II:

In this part, you are requested to give your opinions about holiday facilities and services. Please tick the most appropriate box for each question. If you think there is any question which seems not to be very much appropriate to you, you should skip it and move on to the next.

ACCOMMODATION

29. Physical standard of my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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30. Level of services at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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31. Cleanliness of my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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32. Security of the room at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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33. Adequacy of water and electricity supply at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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34. Quality of food at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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35. Variety of food at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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36. Signposting to bedrooms and public areas at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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37. Speed of check-in / check-out at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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38. Level of spoken language in English at my accommodation

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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FACILITIES AND SERVICES IN THE RESORT OVERALL**39. Suitability of nightlife and entertainment**

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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40. Availability of shopping facilities

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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41. Availability of facilities and services for children

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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42. Availability of health services

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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43. Availability of sport facilities and activities

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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44. Availability of daily tours arranged to other main resorts and attractions

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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45. Availability of facilities on the beach (es)

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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FOOD AND BEVERAGE FACILITIES**46. Quality of resort's bars and restaurants**

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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47. Quality of food at resort's bars and restaurants

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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48. Variety of food at resort's bars and restaurants

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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49. Attitudes of staff at resort's bars and restaurants against tourists

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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50. Cleanliness of resort's restaurants and bars

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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51. Quality of service at resort's bars and restaurants

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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52. Level of communication in English language at resort's bars and restaurants

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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HYGIENE AND CLEANLINESS

53. Cleanliness of beaches and sea

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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54. Level of hygiene and sanitation in the resort overall

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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55. Overall cleanliness of the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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LEVEL OF PRICES AND VALUE FOR MONEY

56. Level of souvenir and gift prices in the resort overall

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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57. Level of food and beverage prices in the resort overall

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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58. Level of local transport service prices in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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CUSTOMER CARE AND HOSPITALITY

59. Responsiveness to my requests

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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60. Responsiveness to my complaints

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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61. Attitudes of staff working in tourism towards foreign tourists

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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62. Friendliness of local people

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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63. Willingness of local people to help foreign tourists

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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64. Attitudes of local shopkeepers towards foreign tourists

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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65. Attitudes of local people and staff towards female tourists

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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LOCAL TRANSPORT

66. Frequency of local transport service in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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67. Comfort of local transport service in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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68. Network (accessibility) of local transport service in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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69. Attitudes of local drivers towards foreign tourists

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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RESORT AIRPORT

70. Availability of facilities and services at the resort airport

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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71. Speed of check-in and check-out at the resort airport

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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72. Cleanliness of the resort airport

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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73. Travelling time between the RESORT AIRPORT and the RESORT

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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74. Comfort of transport from the RESORT AIRPORT to the RESORT

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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THE RESORT OVERALL

75. Overall value for money

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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76. Variety of tourist attractions in the resort (museums, historic sites, natural parks etc.)

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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77. Atmosphere of the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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78. Attractiveness of natural environment in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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79. Feelings of personal safety and security overall in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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80. Weather

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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81. Availability of space on the beach (es)

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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82. Standard of spoken language in English in the resort overall

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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83. Adequacy of tourist information in English language in the resort overall

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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84. Signposting to attractions and facilities in the resort

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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OVERALL ABOUT YOUR HOLIDAY

85. Overall how satisfied were you with your current holiday resort in Turkey?

<input type="checkbox"/> delighted	<input type="checkbox"/> pleased	<input type="checkbox"/> mostly satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> mostly dissatisfied	<input type="checkbox"/> unhappy	<input type="checkbox"/> terrible
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86. How likely are you to recommend your holiday in Turkey to your friends or relatives?

<input type="checkbox"/> definitively	<input type="checkbox"/> most likely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> unlikely	<input type="checkbox"/> most unlikely	<input type="checkbox"/> not likely at all
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87. How likely are you to visit this resort in the future?

<input type="checkbox"/> definitively	<input type="checkbox"/> most likely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> unlikely	<input type="checkbox"/> most unlikely	<input type="checkbox"/> not likely at all
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88. If you are *not likely at all* to visit this resort again, please give reason (s) below

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89. How likely are you to visit another resort in Turkey in the future?

<input type="checkbox"/> definitely	<input type="checkbox"/> most likely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> unlikely	<input type="checkbox"/> most unlikely	<input type="checkbox"/> not likely at all
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90. Would you choose any of the following items that need to be improved in the resort in Turkey?

<input type="checkbox"/> Quality of services at accommodation <input type="checkbox"/> Local transport <input type="checkbox"/> Attitudes of local people <input type="checkbox"/> Natural environment <input type="checkbox"/> Attitudes of shopkeepers <input type="checkbox"/> Food <input type="checkbox"/> Sport facilities and activities <input type="checkbox"/> Quality of services at restaurants and bars	<input type="checkbox"/> Signposting <input type="checkbox"/> Cleanliness <input type="checkbox"/> Levels of prices <input type="checkbox"/> Safety and security <input type="checkbox"/> Language communication <input type="checkbox"/> Resort airport <input type="checkbox"/> Others:..... <input type="checkbox"/> Others:.....
---	---

YOUR TRAVEL EXPENDITURES

91. How much did you pay for the package tour? (ONLY FOR YOURSELF) (in British Sterling))

<input type="checkbox"/> less than 200	<input type="checkbox"/> 300-349	<input type="checkbox"/> 450-499	<input type="checkbox"/> 600-649
<input type="checkbox"/> 200-249	<input type="checkbox"/> 350-399	<input type="checkbox"/> 500-549	<input type="checkbox"/> 650-699
<input type="checkbox"/> 250-299	<input type="checkbox"/> 400-449	<input type="checkbox"/> 550-599	<input type="checkbox"/> 700 and over

92. What was your holiday spending in the resort in British Sterling? If you are a family please consider other members' expenses as well. Please exclude package tour prices.

93. How many people included in total payment (including yourself)? Please state the number of person (s) in each category.

adults over 15 years old: _____

other(s) below 15 years old: _____

94. What is the breakdown of your holiday expenses? Please exclude package tour and accommodation fares. If you are a family or have partner, please consider other members' expenses.

Activity	In £
Food and beverage	
Souvenir and gifts	
Visiting attractions (fees)	
Clothes	
Local transportation	
Daily tours, excursions, rent a car	
Others (specify):.....	
Total	

The Questionnaire is now complete. Thank you for your assistance.



Questionnaire 2

Dear Guest,

This questionnaire has been prepared as a part of research project which aims to compare visitors' views of two different overseas holiday resorts. If you have taken any package holiday to ANY RESORT in TURKEY during the LAST THREE YEARS, PLEASE ANSWER the following questions. Otherwise, PLEASE RETURN the questionnaire.

The findings will be kept confidential and will only be used for academic purposes. The questionnaire takes only a few minutes to complete and will provide very valuable information. Thank you very much for your assistance.

PART I: ABOUT YOU AND YOUR HOLIDAY

1. Country of Residence: _____

2. Are you?: male female

3. Your age: 15-24 25-34 35-44 45-54 55-64 65 and over

. Your occupation (If you are retired, please state it as 'retired'): _____

7. Which group best describes your annual household income? (in British Sterling)

<input type="checkbox"/> under 5,000	<input type="checkbox"/> 15,000-19,999	<input type="checkbox"/> 30,000-34,999	<input type="checkbox"/> 45,000-49,999
<input type="checkbox"/> 5,000-9,999	<input type="checkbox"/> 20,000-24,999	<input type="checkbox"/> 35,000-39,999	<input type="checkbox"/> 50,000 and over
<input type="checkbox"/> 10,000-14,999	<input type="checkbox"/> 25,000-29,999	<input type="checkbox"/> 40,000-44,999	

. Was your holiday?

<input type="checkbox"/> all inclusive	<input type="checkbox"/> half board	<input type="checkbox"/> self catering	<input type="checkbox"/> flight only
<input type="checkbox"/> full board	<input type="checkbox"/> bed and breakfast	<input type="checkbox"/> room only	

. Length of holiday

<input type="checkbox"/> less than a week	<input type="checkbox"/> 8-13 nights	<input type="checkbox"/> 21 nights (three weeks)	<input type="checkbox"/> more
<input type="checkbox"/> a week	<input type="checkbox"/> 15-20 nights	<input type="checkbox"/> four weeks	

8. How far in advance did you book your holiday?

<input type="checkbox"/> less than a week	<input type="checkbox"/> 1-4 weeks	<input type="checkbox"/> 1-3 months	<input type="checkbox"/> 4-6 months	<input type="checkbox"/> 7 months and over
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. Type of accommodation used

<input type="checkbox"/> hotel	<input type="checkbox"/> apartment (apart hotel)	<input type="checkbox"/> holiday village	<input type="checkbox"/> other (specify):
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0. The name of holiday resort you visited on this occasion?: _____

1. Was this resort the first on your choice list?: yes no

2. Excluding this trip, how many times have you been to Mallorca before?

<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6 or more
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3. Excluding this trip, how many times have you been to this resort before?

<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6 or more
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14. Please tell us the three most important things that you took into account while selecting this destination

1.	2.	3.
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15. The name of the holiday resort in TURKEY you have visited most recently: _____

16. When have you been to that resort in TURKEY (please specify month and year): _____

**PART II: HOW THIS RESORT COMPARED
WITH THE RESORT IN TURKEY**

In this section, you are requested to compare your holiday RESORT in MALLORCA with another RESORT in TURKEY that you have visited in the LAST THREE YEARS. If you find a particular question not to be relevant to your holiday, please move on to the next question.

ACCOMMODATION

In comparison with the resort in TURKEY,

17. Physical standard of my accommodation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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8. Level of services at my accommodation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

9. My accommodation here was

<input type="checkbox"/> much cleaner	<input type="checkbox"/> cleaner	<input type="checkbox"/> about the same	<input type="checkbox"/> dirtier	<input type="checkbox"/> much dirtier	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	----------------------------------	---------------------------------------	-------------------------------------

0. The room at my accommodation here was

<input type="checkbox"/> much more secure	<input type="checkbox"/> more secure	<input type="checkbox"/> about the same	<input type="checkbox"/> less secure	<input type="checkbox"/> much less secure	<input type="checkbox"/> no opinion
---	--------------------------------------	---	--------------------------------------	---	-------------------------------------

1. Electricity and water supply at my accommodation here was

<input type="checkbox"/> much more adequate	<input type="checkbox"/> more adequate	<input type="checkbox"/> about the same	<input type="checkbox"/> more inadequate	<input type="checkbox"/> much more inadequate	<input type="checkbox"/> no opinion
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2. Quality of food at my accommodation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

3. Variety of food at my accommodation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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4. Signposting to bedrooms and public areas at my accommodation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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5. Check-in and check out at my accommodation here was

<input type="checkbox"/> much faster	<input type="checkbox"/> faster	<input type="checkbox"/> about the same	<input type="checkbox"/> slower	<input type="checkbox"/> much slower	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	---------------------------------	--------------------------------------	-------------------------------------

6. Level of spoken language in English at my accommodation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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LOCAL TRANSPORT

In comparison with the resort in TURKEY,

27. Local transport service here was

<input type="checkbox"/> much more frequent	<input type="checkbox"/> more frequent	<input type="checkbox"/> about the same	<input type="checkbox"/> more infrequent	<input type="checkbox"/> much more infrequent	<input type="checkbox"/> no opinion
---	--	---	--	---	-------------------------------------

28. Local transport service here was

<input type="checkbox"/> much more comfortable	<input type="checkbox"/> more comfortable	<input type="checkbox"/> about the same	<input type="checkbox"/> more uncomfortable	<input type="checkbox"/> much more uncomfortable	<input type="checkbox"/> no opinion
--	---	---	---	--	-------------------------------------

29. Network (accessibility) of local transport here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

30. Attitudes of local drivers towards foreign tourists were

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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CLEANLINESS AND HYGIENE

n comparison with the resort in TURKEY,

31. Beaches and sea here were

<input type="checkbox"/> much cleaner	<input type="checkbox"/> cleaner	<input type="checkbox"/> about the same	<input type="checkbox"/> dirtier	<input type="checkbox"/> much dirtier	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	----------------------------------	---------------------------------------	-------------------------------------

32. Level of hygiene and sanitation here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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3. Overall cleanliness of the resort was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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LEVELS OF PRICES

n comparison with the resort in TURKEY,

4. Local transport service prices here were

<input type="checkbox"/> much cheaper	<input type="checkbox"/> cheaper	<input type="checkbox"/> about the same	<input type="checkbox"/> more expensive	<input type="checkbox"/> much more expensive	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	---	--	-------------------------------------

5. Food and beverage prices here were

<input type="checkbox"/> much cheaper	<input type="checkbox"/> cheaper	<input type="checkbox"/> about the same	<input type="checkbox"/> more expensive	<input type="checkbox"/> much more expensive	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	---	--	-------------------------------------

6. Shopping prices here were

<input type="checkbox"/> much cheaper	<input type="checkbox"/> cheaper	<input type="checkbox"/> about the same	<input type="checkbox"/> more expensive	<input type="checkbox"/> much more expensive	<input type="checkbox"/> no opinion
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FOOD AND BEVERAGE SERVICES

In comparison with the resort in TURKEY,

37. Quality of this resort's restaurants and bars was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

38. Quality of food at this resort's restaurants and bars was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

39. Variety of food at this resort's restaurants and bars was

<input type="checkbox"/> much richer	<input type="checkbox"/> richer	<input type="checkbox"/> about the same	<input type="checkbox"/> poorer	<input type="checkbox"/> much poorer	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	---------------------------------	--------------------------------------	-------------------------------------

40. Attitude of staff towards tourists at this resort's restaurants and bars was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

41. This resort's restaurants and bars were

<input type="checkbox"/> much cleaner	<input type="checkbox"/> cleaner	<input type="checkbox"/> about the same	<input type="checkbox"/> dirtier	<input type="checkbox"/> much dirtier	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	----------------------------------	---------------------------------------	-------------------------------------

42. Service at this resort's restaurants and bars was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

43. Level of communication in English at restaurants and bars here was

<input type="checkbox"/> much easier	<input type="checkbox"/> easier	<input type="checkbox"/> about the same	<input type="checkbox"/> more difficult	<input type="checkbox"/> much more difficult	<input type="checkbox"/> no opinion
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CUSTOMER CARE AND HOSPITALITY

In comparison with the resort in TURKEY,

4. Responsiveness to my requests here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
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5. Responsiveness to my complaints here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

6. Attitudes of staff working in tourism here were

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

7. Local people here were

<input type="checkbox"/> much more friendly	<input type="checkbox"/> more friendly	<input type="checkbox"/> about the same	<input type="checkbox"/> more unfriendly	<input type="checkbox"/> much more unfriendly	<input type="checkbox"/> no opinion
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8. Local people here were

<input type="checkbox"/> much more helpful	<input type="checkbox"/> more helpful	<input type="checkbox"/> about the same	<input type="checkbox"/> less helpful	<input type="checkbox"/> much less helpful	<input type="checkbox"/> no opinion
--	---------------------------------------	---	---------------------------------------	--	-------------------------------------

9. Attitudes towards female tourists here were

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

0. Attitudes of local shopkeepers towards foreign tourists here were

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

FACILITIES, ACTIVITIES AND SERVICES

In comparison with the resort in TURKEY,

51. **Nightlife and entertainment here was**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

52. **Variety of shopping facilities here was**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

53. **Availability and variety of facilities and services for children here was**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

54. **Availability of health services here was**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

55. **Availability of daily tours arranged to other main resorts and attractions here was**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

56. **Availability and variety of sport facilities and activities overall here were**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

57. **Facilities on the beach (es) here were**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

RESORT AIRPORT

In comparison with the airport in TURKEY,

58. **Facilities and services here were**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

9. **Check-in and check-out here was**

<input type="checkbox"/> much faster	<input type="checkbox"/> faster	<input type="checkbox"/> about the same	<input type="checkbox"/> slower	<input type="checkbox"/> much slower	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	---------------------------------	--------------------------------------	-------------------------------------

0. **The resort airport here was**

<input type="checkbox"/> much cleaner	<input type="checkbox"/> cleaner	<input type="checkbox"/> about the same	<input type="checkbox"/> dirtier	<input type="checkbox"/> much dirtier	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	----------------------------------	---------------------------------------	-------------------------------------

1. **Travelling time between the resort airport and the resort was**

<input type="checkbox"/> much shorter	<input type="checkbox"/> shorter	<input type="checkbox"/> about the same	<input type="checkbox"/> longer	<input type="checkbox"/> much longer	<input type="checkbox"/> no opinion
---------------------------------------	----------------------------------	---	---------------------------------	--------------------------------------	-------------------------------------

2. **Transport from the resort airport to the resort was**

<input type="checkbox"/> much more comfortable	<input type="checkbox"/> more comfortable	<input type="checkbox"/> about the same	<input type="checkbox"/> more uncomfortable	<input type="checkbox"/> much more uncomfortable	<input type="checkbox"/> no opinion
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THE RESORT OVERALL

1 comparison with the resort in TURKEY,

3. **Overall value for money here was**

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

64. Variety of tourist attractions here was (museums, historic sites, nature parks etc.)

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

65. Atmosphere of this resort was

<input type="checkbox"/> much more lively	<input type="checkbox"/> more lively	<input type="checkbox"/> about the same	<input type="checkbox"/> less lively	<input type="checkbox"/> much less lively	<input type="checkbox"/> no opinion
---	--------------------------------------	---	--------------------------------------	---	-------------------------------------

66. Natural environment here was

<input type="checkbox"/> much more preserved	<input type="checkbox"/> more preserved	<input type="checkbox"/> about the same	<input type="checkbox"/> more spoiled	<input type="checkbox"/> much more spoiled	<input type="checkbox"/> no opinion
--	---	---	---------------------------------------	--	-------------------------------------

67. Feelings of personal safety and security here were

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

68. Weather here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

69. Availability of space on the beach (es) here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

70. Standard of spoken language in English overall here was

<input type="checkbox"/> much better	<input type="checkbox"/> better	<input type="checkbox"/> about the same	<input type="checkbox"/> worse	<input type="checkbox"/> much worse	<input type="checkbox"/> no opinion
--------------------------------------	---------------------------------	---	--------------------------------	-------------------------------------	-------------------------------------

71. Tourist information in English language here was

<input type="checkbox"/> much more adequate	<input type="checkbox"/> more adequate	<input type="checkbox"/> about the same	<input type="checkbox"/> more inadequate	<input type="checkbox"/> much more inadequate	<input type="checkbox"/> no opinion
---	--	---	--	---	-------------------------------------

72. Signposting to attractions and facilities here was

<input type="checkbox"/> much more organised	<input type="checkbox"/> more organised	<input type="checkbox"/> about the same	<input type="checkbox"/> more unorganised	<input type="checkbox"/> much more unorganised	<input type="checkbox"/> no opinion
--	---	---	---	--	-------------------------------------

73. This resort overall was

<input type="checkbox"/> much more quiet	<input type="checkbox"/> more quiet	<input type="checkbox"/> about the same	<input type="checkbox"/> noisier	<input type="checkbox"/> much noisier	<input type="checkbox"/> no opinion
--	-------------------------------------	---	----------------------------------	---------------------------------------	-------------------------------------

4. Overall how satisfied were you with your holiday in TURKEY?

<input type="checkbox"/> very satisfied	<input type="checkbox"/> satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> dissatisfied	<input type="checkbox"/> very dissatisfied
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5. How likely are you to recommend your holiday in TURKEY to your friends or relatives?

<input type="checkbox"/> definitely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> not likely	<input type="checkbox"/> not likely at all
-------------------------------------	---------------------------------	--------------------------------	-------------------------------------	--

6. How likely are you to return to this resort in TURKEY?

<input type="checkbox"/> definitely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> not likely	<input type="checkbox"/> not likely at all
-------------------------------------	---------------------------------	--------------------------------	-------------------------------------	--

7. How likely are you to visit another resort in TURKEY in the future?

<input type="checkbox"/> definitely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> not likely	<input type="checkbox"/> not likely at all
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ABOUT YOUR HOLIDAY IN TURKEY

8. Overall how satisfied were you with your holiday in TURKEY?

<input type="checkbox"/> very satisfied	<input type="checkbox"/> satisfied	<input type="checkbox"/> neither satisfied nor dissatisfied	<input type="checkbox"/> dissatisfied	<input type="checkbox"/> very dissatisfied
---	------------------------------------	---	---------------------------------------	--

79. How likely are you to recommend your holiday in TURKEY to your friends or relatives?

<input type="checkbox"/> definitely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> not likely	<input type="checkbox"/> not likely at all
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80. How likely are you to return to the same resort in TURKEY?

<input type="checkbox"/> definitely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> not likely	<input type="checkbox"/> not likely at all
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81. How likely are you to visit another resort in TURKEY?

<input type="checkbox"/> definitely	<input type="checkbox"/> likely	<input type="checkbox"/> maybe	<input type="checkbox"/> not likely	<input type="checkbox"/> not likely at all
-------------------------------------	---------------------------------	--------------------------------	-------------------------------------	--

82. If an opportunity was given, would you prefer a holiday in TURKEY or in MALLORCA?

<input type="checkbox"/> in TURKEY	<input type="checkbox"/> in MALLORCA	<input type="checkbox"/> Not sure
------------------------------------	--------------------------------------	-----------------------------------

83. Could you please state reason (s) for Question 82?

The questionnaire is now complete. Thank you for your assistance.



Questionnaire 3

Dear Guest,

I am currently carrying out research into tourist satisfaction as a part of a PhD at Sheffield Hallam University. Three boxes are provided for you to compare the resort in MALLORCA with *another resort which you have visited since the beginning of 1995*. If you have visited MALLORCA before, you are then asked to say how it has changed.

The overseas resorts I have visited since the beginning of 1995 are: _____

The resort I have compared to MALLORCA is: _____

The resort in which I stayed in MALLORCA was: _____

In what respects is MALLORCA better than the other resort?

In what respects is MALLORCA worse than the other resort?

Overall which resort was best and why?

If you have visited MALLORCA previously, please answer the following three questions.

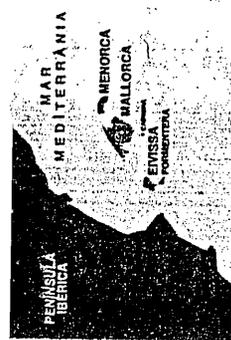
. When have you been to MALLORCA before (the latest one): _____

. In what ways has MALLORCA changed for the BETTER since your last visit?

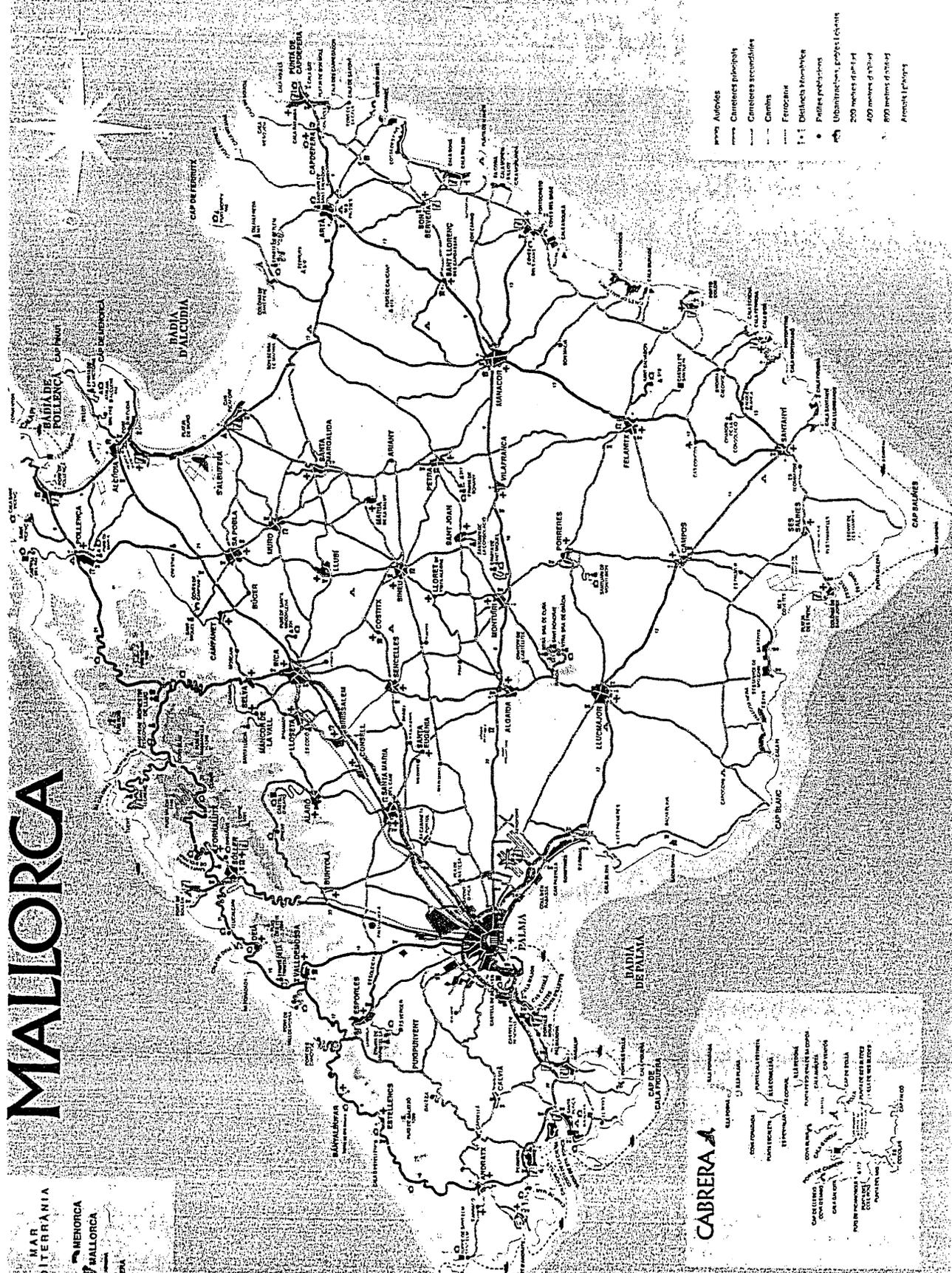
In what ways has MALLORCA changed for the WORSE since your last visit?

Thank you for taking part in this questionnaire survey.

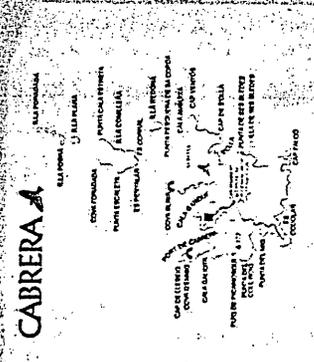
MALLORCA



EXEMPLAR GRATUIT
FREE COPY



- Autobus
- Camiere piblics
- Camiere secundaris
- Camiere
- Ferrocarril
- Districte Municipal
- Polis piblics
- Urbanitzacions projectades
- 200 metres d'altura
- 400 metres d'altura
- 800 metres d'altura
- Altura d'altura



- Museus
- Casals i monuments
- Vestigis arqueològics
- Ermites i santuaris
- Coves
- Plenes aigua
- Oracles d'informació turística
- Camping
- Vista panoràmica
- Parc natural
- Excursions marítimes
- Banyera
- Banyera sense plom
- Serveis a ports
- Cotes d'altura

Turkey

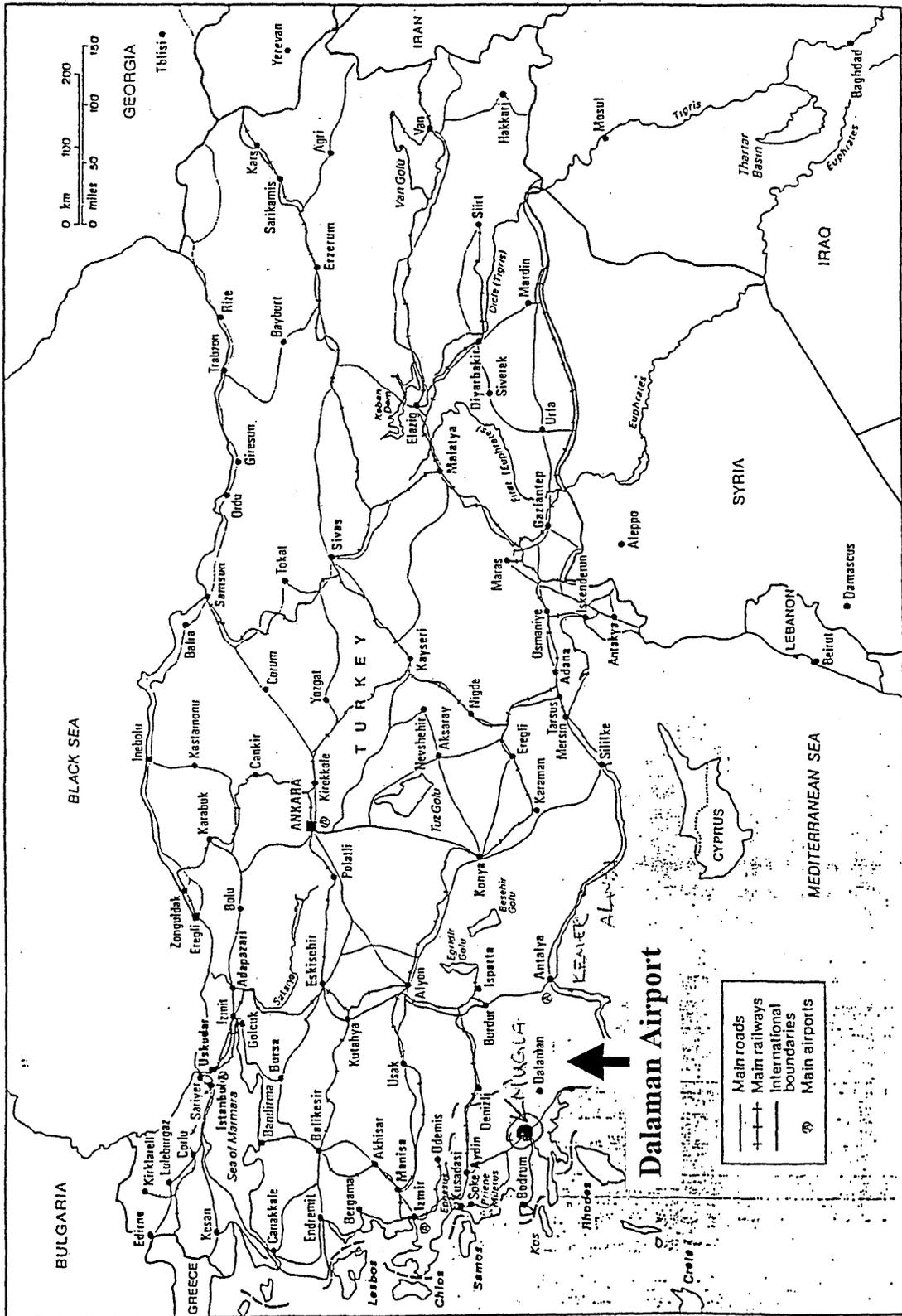


Table D1: Details about Sample (Questionnaire 1 - British and German)

	German		British	
	Turkey	Mallorca	Turkey	Mallorca
Gender	(n=407)	(n=437)	(n=491)	(n=444)
Male	56.3	56.3	49.3	55.2
Female	43.7	43.7	50.7	44.8
Age	(n=421)	(n=460)	(n=502)	(n=465)
15-24	15.0	22.6	16.7	6.3
25-34	29.2	31.5	25.9	18.7
35-44	27.1	25.4	23.1	37.8
45-54	19.7	16.1	22.7	26.5
55 and over	9.0	4.3	11.6	10.6
Income (British Sterling)	---	---	(n=457)	(n=421)
Under 5,000	---	---	2.2	1.9
5,000-9,999	---	---	6.6	1.9
10,000-14,999	---	---	12.0	10.2
15,000-19,999	---	---	18.8	15.7
20,000-24,999	---	---	14.2	18.3
25,000-29,999	---	---	14.7	18.3
30,000-34,999	---	---	11.4	12.1
35,000-39,999	---	---	7.7	6.2
40,000-44,999	---	---	4.2	6.2
45,000-49,999	---	---	3.1	2.6
50,000 and over	---	---	5.3	6.7
Income (Deutsche Mark)	(n=340)	(n=398)	---	---
Under 10,000	8.2	10.1	---	---
10,000-19,999	3.8	8.0	---	---
20,000-29,999	5.6	8.5	---	---
30,000-39,999	8.2	13.6	---	---
40,000-49,999	10.9	13.1	---	---
50,000-59,999	11.5	10.1	---	---
60,000-69,999	11.5	8.0	---	---
70,000-79,999	5.9	4.8	---	---
80,000-89,999	9.1	8.0	---	---
90,000-99,999	4.7	4.0	---	---
100,000 and over	20.6	11.8	---	---
Was it first on choice list?	(n=412)	(n=451)	(n=497)	(n=455)
Yes	76.0	71.8	84.7	80.2
No	24.0	28.2	15.3	19.8
How many times in Mallorca (Turkey)	(n=429)	(n=467)	(n=511)	(n=465)
0	39.9	41.1	57.5	28.8
1	17.5	20.8	22.5	19.8
2	16.8	12.4	13.1	12.5
3	7.7	8.6	2.5	11.4
4	4.4	5.1	1.4	8.8
5	3.3	2.4	.6	3.7
6 and over	10.5	9.6	2.3	15.1
How many times in the same resort	(n=426)	(n=464)	(n=511)	(n=465)
0	74.4	70.9	76.7	69.0

1	11.5	11.4	15.3	14.0
2	4.9	6.9	4.9	6.9
3	1.9	4.1	1.4	3.7
4	1.6	1.7	6	1.5
5 and over	5.7	4.9	1.0	4.9
How far in advance booked holiday	(n=425)	(n=466)	(n=509)	(n=465)
Less than a week	16.7	5.4	5.3	8.4
1-4 weeks	35.8	35.0	17.9	15.3
1-3 months	16.7	23.8	17.3	11.6
4-6 months	22.6	14.6	24.0	20.0
7 months and over	8.2	2	35.6	44.7
Length of holiday	(n=428)	(n=466)	(n=511)	(n=465)
Less than a week	7	2.6	---	9
A week	27.3	30.7	26.8	30.3
8-13 nights	15.7	24.7	6.8	17.0
14 nights	45.1	38.2	65.6	51.4
15-20 nights	8.9	1.3	6	0
Type of holiday	(n=429)	(n=464)	(n=511)	(n=464)
All inclusive	23.1	2.6	4.3	11.6
Full board	4.2	2.2	2	4
Half board	64.3	82.3	14.1	44.6
Bed and breakfast	4.7	4.7	45.6	3.7
Self catering	2.3	7.1	33.1	37.1
Room only	5	4	1.0	1.1
Flight only	.9	4	1.6	1.5
Type of accommodation	(n=428)	(n=466)	(n=510)	(n=465)
Hotel	83.9	73.2	58.8	57.8
Apartment (apart hotel)	5.4	24.5	35.9	38.7
Holiday village	8.6	1.3	3.5	3.4
Other (pension)	2.1	1.1	1.8	0
Number of People (age over 15)	(n=351)	(n=393)	(n=425)	(n=413)
1	26.8	31.8	26.6	11.4
2	62.1	59.5	62.1	70.7
3	7.7	8.4	4.9	13.1
4	3.5	0.3	6.4	4.8
Number of Children (below 15 years old)	(n=82)	(n=136)	(n=72)	(n=203)
1	65.9	61.8	44.4	48.8
2	31.7	33.8	48.6	44.3
3-5	2.4	4.4	6.9	6.9
How much paid for tour package (£)	---	---	(n=477)	(n=440)
Less than 200	---	---	10.9	1.6
200-249	---	---	9.2	2.0
250-299	---	---	8.2	4.8
300-349	---	---	16.6	11.4
350-399	---	---	17.6	11.4
400-449	---	---	11.7	14.8
450-499	---	---	8.6	9.8
500-549	---	---	4.8	11.4

550-599	---	---	2.5	7.7
600-649	---	---	2.5	6.8
650-699	---	---	2.5	3.2
700 and over	---	---	4.8	15.2
How much paid for package tour (DM)	(n=396)	(n=433)	---	---
Less than 400	1.0	1.2	---	---
400-699	9.3	3.0	---	---
700-999	20.7	16.2	---	---
1000-1299	19.9	21.2	---	---
1300-1599	16.4	27.9	---	---
1600-1899	9.6	13.2	---	---
1900-2199	6.1	6.7	---	---
2200 and over	16.9	10.6	---	---

Table D2: Comparison between Profiles of British and German Tourists in Mallorca

Variables	X ²	d.f.	P
Type of holiday	182.578	7	.000
How far in advance booking	124.122	6	.000
Age	90.087	5	.000
Number of people in category 1	63.569	3	.000
Length of holiday	36.542	7	.000
Type of accommodation	32.149	3	.000
Number of people in category 2	25.612	3	.000
The number of repeat visits to Mallorca	23.127	6	.000
Ranking on the choice list	8.104	1	.004
The number of repeat visits to the same resort	1.419	6	.964
Gender	.958	1	.756

Table D3: Comparison between Profiles of British and German Tourists in Turkey

Variables	X ²	d.f.	P value
Type of holiday	504.661	7	.000
How far in advance booking	132.186	4	.000
Type of accommodation	129.942	3	.000
Length of holiday	86.243	6	.000
The number of repeat visits to Mallorca	75.011	6	.000
The number of repeat visits to the same resort	22.970	7	.001
Number of people in category 2	12.713	3	.005
Ranking on the choice list	11.062	1	.000
Number of people in category 1	8.227	5	.144
Age	5.946	5	.311
Gender	4.344	1	.037

Table D4: Comparison between Profiles of British Tourists in Mallorca and Turkey

Variables	X ²	d.f.	p value
Type of holiday	265.197	7	.000
The number of repeat visits to Mallorca/Turkey	160.354	6	.000
How much paid for tour (one person)	127.300	11	.000
Number of people in category 2	104.883	3	.000
Number of people in category 1	48.054	5	.000
Age	46.671	5	.000
Length of holiday	41.018	7	.000
The number of repeat visits to the same resort	27.270	7	.000
Income	20.420	10	.025
How far in advance booking	16.623	4	.002
Type of accommodation	8.773	3	.032
Ranking on the choice list	3.324	1	.068
Gender	3.244	1	.071

Table D5: Comparison between Profiles of German Tourists in Mallorca and Turkey

Variables	X ²	d.f	p value
Type of holiday	100.442	7	.000
Type of accommodation	82.807	3	.000
How far in advance booking	37.974	5	.000
Length of holiday	37.332	6	.000
Income	27.717	10	.004
Number of people in category 1	20.823	8	.007
How much paid for tour	17.251	14	.243
Age	16.734	5	.005
Number of people in category 2	12.476	3	.005
The number of repeat visits to the same resort	6.941	6	.326
The number of repeat visits to Mallorca/Turkey	5.474	6	.484
Ranking on the choice list	2.257	1	.132
Gender	0.008	1	.976

Table D6: The findings of factor analysis

Factors	Eigenvalue	Percent of variance (%)	Grand mean	Prob.
CULTURE	3.05	21.8	4.24	.000
to increase knowledge of new places (.80)				
to visit historical and cultural sites (.80)				
to meet local people (.75)				
FANTASY	2.06	14.7	4.18	.000
to have fun (.68)				
to mix with fellow tourists (.68)				
to seek adventure (.54)				
to get away from home (.52)				
RELAXATION AND PLEASURE	1.61	11.5	5.79	.000
to relax (.80)				
to be emotionally and physically refreshed (.78)				
to enjoy good weather (.41)				
to spend time with people cared deeply about (.36)				
PHYSICAL	1.16	8.3	3.66	.000
to engage in sports (.78)				
to be active (.76)				
to get close to nature (.53)				

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Table D7: Mean differences between push motivations of British Tourists visiting Mallorca and Turkey (t-test)

Motivations	Mallorca	Turkey	t-value	2-Tail Sig
CULTURE	3.46	4.73	-15.15	.000
to meet local people	3.81	5.11	-13.56	.000
to increase knowledge of new places	3.78	5.08	-12.64	.000
to visit historical and cultural sites	2.81	4.02	-11.11	.000
FANTASY	4.19	4.60	-3.34	.001
to seek adventure	2.90	3.82	-8.62	.000
to mix with fellow tourists	3.71	4.07	-3.34	.001
to have fun	5.47	5.74	-3.29	.001
to get away from home	4.71	4.80	-.72	.470
RELAXATION AND PLEASURE	5.77	5.73	1.81	.070
to enjoy good weather	6.43	6.31	2.55	.011
to relax	5.94	5.99	-1.44	.150
to spend time with people cared deeply about	5.35	5.23	.99	.320
to be emotionally and physically refreshed	5.36	5.40	-.51	.610
PHYSICAL	2.92	3.38	-1.50	.133
to get close to nature	2.45	3.30	-7.77	.000
to engage in sports	2.61	2.93	-3.09	.002
to be active	3.71	3.93	-1.96	.051

Note: The negative t-values mean that Turkey has higher mean scores than Mallorca for the related motivation items.

Table D8: Mean differences between push motivations of German Tourists visiting Mallorca and Turkey (t-test)

Motivations	Mallorca	Turkey	t-value	2-Tail Sig
CULTURE	3.94	4.83	-9.57	.000
to visit historical and cultural sites	3.71	4.37	-6.01	.000
to increase knowledge of new places	4.16	4.80	-6.02	.000
to meet local people	3.95	5.34	-9.13	.000
FANTASY	3.94	3.95	-.03	.976
to seek adventure	2.77	3.02	-2.87	.004
to get away from home	4.67	4.44	1.74	.082
to have fun	5.29	5.35	-.64	.525
to mix with fellow tourists	3.03	3.00	-.61	.540
RELAXATION AND PLEASURE	5.85	5.83	.21	.835
to be emotionally and physically refreshed	5.66	5.71	-.64	.521
to spend time with people cared deeply about	5.50	5.34	1.34	.179
to relax	5.85	5.95	-1.47	.141
to enjoy good weather	6.40	6.33	1.46	.146
PHYSICAL	4.00	4.44	-2.98	.003
to get close to nature	4.58	5.05	-5.69	.000
to engage in sports	3.24	3.63	-3.36	.001
to be active	4.18	4.66	-2.93	.004

Note: The negative t-values mean that Turkey has higher mean scores than Mallorca for the related motivation items.

Table D9: Mean differences between push motivations of British and German Tourists visiting Turkey (t-test)

Motivations	British	German	t-value	2-Tail Sig
CULTURE	4.73	4.83	.05	.960
to visit historical and cultural sites	4.02	4.37	-3.29	.001
to increase knowledge of new places	5.08	4.80	2.92	.004
to meet local people	5.11	5.34	-1.59	.112
FANTASY	4.60	3.95	10.94	.000
to mix with fellow tourists	4.07	3.00	9.88	.000
to seek adventure	3.82	3.02	7.17	.000
to have fun	5.74	5.35	4.62	.000
to get away from home	4.80	4.44	2.88	.004
RELAXATION AND PLEASURE	5.73	5.83	-4.83	.000
to be emotionally and physically refreshed	5.40	5.71	-3.72	.000
to spend time with people cared deeply about	5.23	5.34	-1.02	.308
to relax	5.99	5.95	.53	.596
to enjoy good weather	6.31	6.33	-.52	.600
PHYSICAL	3.38	4.44	-9.72	.000
to get close to nature	3.30	5.05	-16.77	.000
to engage in sports	2.93	3.63	-6.13	.000
to be active	3.93	4.66	-4.49	.000

Note: The negative t-values mean that German tourists have higher mean scores than British tourists for the related motivation items.

Table D10: Mean differences between push motivations of British and German Tourists visiting Mallorca (t-test)

Motivations	British	German	t-value	2-Tail Sig
CULTURE	3.46	3.94	-5.08	.000
To visit historical and cultural sites	2.81	3.71	-8.13	.000
To increase knowledge of new places	3.78	4.16	-3.41	.001
To meet local people	3.81	3.95	-1.40	.161
FANTASY	4.19	3.94	7.20	.000
To mix with fellow tourists	3.71	3.03	6.68	.000
To seek adventure	2.90	2.77	1.86	.063
To have fun	5.47	5.29	1.86	.063
To get away from home	4.71	4.67	.37	.714
RELAXATION AND PLEASURE	5.77	5.85	-2.86	.004
To be emotionally and physically refreshed	5.36	5.66	-3.45	.001
To spend time with people cared deeply about	5.35	5.50	-1.23	.220
To enjoy good weather	6.43	6.40	.66	.512
To relax	5.94	5.85	.53	.595
PHYSICAL	2.92	4.00	-9.47	.000
To get close to nature	2.45	4.58	-19.59	.000
To engage in sports	2.61	3.24	-5.75	.000
To be active	3.71	4.18	-4.47	.000

Note: The negative t-values mean that German tourists have higher mean scores than British tourists for the related motivation items.

Table D11: Pull Motivations of British and German tourists (%)

Items	British		German	
	Mallorca	Turkey	Mallorca	Turkey
Accommodation	16.2	11.8	5.6	4.4
Weather	13.0	19.3	21.7	22.2
Price /cost	11.4	19.2	7.0	9.3
Destination / resort	10.5	8.1	6.9	6.4
Sea / beaches	9.6	5.5	18.5	12.1
Family-oriented	5.6	1.2	1.8	0.8
Nightlife / entertainment	5.1	3.8	5.8	0.4
Quiet	5.1	4.4	5.5	4.1
Facilities	3.6	1.7	0	0
Flight time	3.4	0.8	7.4	1.0
Availability	3.3	2.5	1.4	1.8
Food	1.8	2.4	1.5	1.6
Recommendation	1.3	1.7	2.5	2.1
Familiarity (repeat visit)	1.2	0.5	0.8	0.2
Local people / culture	1.0	3.8	2.0	8.7
Scenery / landscape	0.8	2.6	3.5	7.6
First experience	0.8	1.1	0.8	0.6
Sport facilities	0.2	0.4	2.0	2.3
Cleanliness	0	1.4	0	0.4
Plenty to do and see	0	1.6	0	0.1

Table D12: Comparison between British Tourists visiting Mallorca and Turkey

	Mallorca (%)	Turkey (%)	Chi-square	Sig.
Family-oriented	5.6	1.2	14.979	.0001
Price/cost	11.4	19.2	11.268	.0007
Flight time	3.4	0.8	8.569	.0034
Local people/culture	1.0	3.8	7.859	.0050
Plenty to do and see	0	1.6	7.340	.0067
Weather	12.0	19.3	6.555	.0104
Cleanliness	0	1.4	6.415	.0013
Sea and beaches	9.6	5.5	6.199	.0127
Accommodation	16.2	11.8	4.300	.0381
Scenery/landscape	0.8	2.6	4.033	.0446

Table D13: Comparison between German Tourists visiting Mallorca and Turkey

	Mallorca (%)	Turkey (%)	Chi-square	Sig.
Local people/culture	2.0	8.7	29.643	.0000
Nightlife/entertainment	5.8	0.4	17.515	.0000
Scenery/landscape	3.5	7.6	7.473	.0062
Sea and beaches	18.5	12.1	4.339	.0372
Flight time	7.4	1.0	4.334	.0373

Table D14: Comparison between British and German Tourists visiting Turkey

	British (%)	German (%)	Chi-square	Sig.
Price/cost	19.2	9.3	18.079	.0000
Accommodation	11.8	4.4	16.200	.0000
Scenery/landscape	3.5	7.6	13.281	.0002
Sea an beaches	5.5	12.1	13.212	.0002
Nightlife/entertainment	3.8	0.4	12.128	.0005
Local People/culture	3.8	8.7	9.085	.0025
Facilities	1.7	0	7.628	.0057
Sports facilities	0.4	2.3	6.961	.0083
Plenty to do and see	1.6	0.1	6.773	.0092

Table D15: Comparison between British and German Tourists visiting Mallorca

	British (%)	German (%)	Chi-square	Sig.
Flight time	3.4	7.4	41.929	.0000
Accommodation	16.2	5.6	17.935	.0000
Sea and beaches	9.6	18.5	17.224	.0000
Weather	13.0	21.7	15.165	.0001
Facilities	3.6	0	12.925	.0003
Scenery/landscape	0.8	3.5	6.675	.0097
Family-oriented	5.6	1.8	6.620	.0100
Sports facilities	0.2	2.0	4.240	.0394

Table D16: Results of Factor analysis (British tourists visiting Mallorca)

FACTOR 1: Hospitality and customer care	FACTOR 5: Nature and environment
<ol style="list-style-type: none"> 1. Attitude of shopkeepers towards foreign tourists (.755) 2. Friendliness of local people (.723) 3. Level of English language at resort's bars and restaurants (.698) 4. Attitude of local people towards female tourists (.689) 5. Level of English language overall (.688) 6. Attitude of staff at resort's bars and restaurants (.676) 7. Level of English language at accommodation (.537) 	<ol style="list-style-type: none"> 1. Availability of space on beaches (.646) 2. Attractiveness of natural environment (.636) 3. Signposting to tourist attractions (.508) 4. Availability of facilities on beaches (.428)
FACTOR 2: Accommodation services	FACTOR 6: Hygiene, sanitation & cleanliness
<ol style="list-style-type: none"> 1. Security of rooms at accommodation (.805) 2. Cleanliness of accommodation (.767) 3. Signposting to public places at accommodation (.724) 4. Adequacy of water and electricity at accommodation (.649) 5. Speed of check-in and out services at accommodation (.609) 6. Feelings of personal safety and security (.463) 	<ol style="list-style-type: none"> 1. Level of hygiene and sanitation overall (.754) 2. Overall cleanliness of resorts (.745) 3. Cleanliness of sea and beaches (.657) 4. Cleanliness of resorts' bars and restaurants (.439)
FACTOR 3: Facilities and activities	FACTOR 7: Resort airport services
<ol style="list-style-type: none"> 1. Availability of facilities for children (.771) 2. Availability of sport facilities and activities (.761) 3. Suitability of nightlife and entertainment (.685) 4. Availability of health services (.625) 5. Availability of daily tours to other resorts and tourist attractions (.594) 6. Availability of shopping facilities (.562) 7. Quality of food at resort's bars and restaurants (.419) 	<ol style="list-style-type: none"> 1. Availability of facilities and services at the resort airport (.813) 2. Speed of check-in and out services at the resort airport (.804) 3. Cleanliness of the resort airport (.763) 4. Comfort of transport between the resort and the resort airport (.351)
FACTOR 4: Local transport services	FACTOR 8: Level of prices
<ol style="list-style-type: none"> 1. Frequency of local transport services (.775) 2. Comfort of local transport services (.763) 3. Attitude of drivers towards foreign tourists (.645) 4. Level of local transport prices (.593) 	<ol style="list-style-type: none"> 1. Level of food and beverage prices (.767) 2. Level of souvenir and gift prices (.644) 3. Overall value for money (.409)
<p>Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .90862 Bartlett Test of Sphericity = 5923.2005 Significance = .0000</p>	

Table D17: Results of Factor Analysis (British Tourists in Mallorca)

Factors	Factor Labels	E. Value	Variance	Mean	Alpha	P
Factor 1	Hospitality and customer care	13.6	34.2	5.59	.8862	.0000
Factor 2	Accommodation services	2.6	6.6	5.90	.8377	.0000
Factor 3	Facilities and activities	2.1	5.4	5.29	.8485	.0000
Factor 4	Local transport services	1.8	4.6	5.15	.7722	.0000
Factor 5	Nature and environment	1.7	4.3	5.53	.7000	.0300
Factor 6	Hygiene, sanitation & cleanliness	1.5	3.8	5.68	.8248	.5521
Factor 7	Resort airport services	1.1	3.0	5.84	.6977	.0000
Factor 8	Level of prices	1.1	2.8	5.60	.7863	.0000

Table D18: Impacts of Factor Items on Overall Satisfaction (British in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Natural environment	.368	.999	9.207	.0000
Hospitality and customer care	.353	.999	8.836	.0000
Facilities and activities	.332	.999	8.314	.0000
Level of prices	.323	.999	8.087	.0000
Accommodation services	.276	.999	6.918	.0000
Hygiene, sanitation and cleanliness	.232	.999	5.816	.0000
Constant	6.029		141.307	.0000
R ² = .61 Standard error = .674 F= 63.806 Sig. F= .0000				

Table D19: Impacts of Factor Items on Intention to Recommend (British in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Natural environment	.339	1.00	7.438	.0000
Level of prices	.337	1.00	7.404	.0000
Hospitality and customer care	.302	1.00	6.641	.0000
Facilities and activities	.249	1.00	5.470	.0000
Hygiene, sanitation and cleanliness	.232	1.00	5.093	.0000
Accommodation services	.222	1.00	4.877	.0000
Resort airport services	.094	1.00	2.065	.0400
Constant	5.832		93.399	.0000
R ² = .49 Standard error = .989 F= 34.020 Sig. F= .0000				

Table D20: Impacts of Factors on Intention to Revisit the Same Resort (British in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Natural environment	.365	1.00	7.597	.0000
Level of prices	.286	1.00	5.946	.0000
Facilities and activities	.263	1.00	5.481	.0000
Hospitality and customer care	.254	1.00	5.296	.0000
Accommodation services	.212	1.00	4.412	.0000
Hygiene, sanitation and cleanliness	.200	1.00	4.163	.0000
Constant	5.191		64.024	.0000
R ² = .43 Standard error = 1.284 F= 31.327 Sig. F= .0000				

Table D21: Impacts of Factors on Intention to Revisit other Resorts (British in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Resort airport services	.188	.999	3.095	.0022
Natural environment	.143	.999	2.362	.0190
Local transport services	.143	.999	2.350	.0196
Hospitality and customer care	.132	.999	2.172	.0308
Constant	5.244		65.521	.0000
R ² = .0941 Standard error = 1.262 F= 6.337 Sig. F= .0001				

Table D22: Results of Factor analysis (German tourists visiting Mallorca)

FACTOR 1: Accommodation services	FACTOR 5: Level of prices
<ol style="list-style-type: none"> 1. Security of rooms at accommodation (.792) 2. Adequacy of water and electricity supply at accommodation (.724) 3. Speed of check-in and out services at accommodation (.685) 4. Cleanliness of accommodation (.695) 5. Signposting to public places at accommodation (.662) 6. Feelings of safety and security (.460) 7. Signposting to tourist attractions in the resort (.350) 	<ol style="list-style-type: none"> 1. Level of souvenir and gift prices (.825) 2. Level of food and beverage prices (.762) 3. Overall value for money (.673)
FACTOR 2: Hospitality and customer care	FACTOR 6: Facilities and activities I
<ol style="list-style-type: none"> 1. Attitude of shopkeepers towards foreign tourists (.757) 2. Attitude of local people towards female tourists (.735) 3. Friendliness of local people (.733) 4. Attitude of staff at the resort's bars and restaurants (.661) 5. Quality of food at resort's bars and restaurants (.615) 6. Cleanliness of resort's bars and restaurants (.610) 	<ol style="list-style-type: none"> 1. Availability of shopping facilities (.774) 2. Suitability of nightlife and entertainment (.721) 3. Availability of facilities on beaches (.671) 4. Availability of daily tours to other resorts and attractions (.574)
FACTOR 3: Local transport services	FACTOR 7: Resort airport services
<ol style="list-style-type: none"> 1. Network of local transport services (.789) 2. Comfort of local transport services (.761) 3. Attitude of drivers towards foreign tourists (.754) 4. Level of local transport prices (.639) 	<ol style="list-style-type: none"> 1. Speed of check-in and out services at the resort airport (.760) 2. Cleanliness of the resort airport (.756) 3. Availability of facilities and services at the resort airport (.604) 4. Comfort of transport services between the resort and the resort airport (.543)
FACTOR 4: Cleanliness	FACTOR 8: Language communication
<ol style="list-style-type: none"> 1. Level of hygiene and sanitation overall (.73902) 2. Overall cleanliness of resorts (.72825) 3. Cleanliness of sea and beaches (.67701) 	<ol style="list-style-type: none"> 1. Level of German language at accommodation facilities (.724) 2. Level of German language overall (.690) 3. Level of German language at resort's bars and restaurants (.579)
FACTOR 9: Facilities and activities II	
<ol style="list-style-type: none"> 1. Availability of facilities for children (.678) 2. Availability of sport facilities and activities (.657) 3. Availability of health services (.634) 	
Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .88453 Bartlett Test of Sphericity = 4119.6894 Significance = .0000	

Table D23: Results of Factor Analysis (German Tourists in Mallorca)

Factors	Factor Labels	E value	Percent of variance	Mean	Alpha	P
Factor 1	Accommodation services	12.4	33.6	5.43	.8269	.0000
Factor 2	Hospitality and customer care	2.7	7.5	5.28	.8679	.0003
Factor 3	Local transport services	2.3	6.4	4.99	.7985	.0069
Factor 4	Cleanliness	1.9	5.2	5.00	.7588	.0037
Factor 5	Level of prices	1.6	4.4	5.12	.7355	.5585
Factor 6	Facilities and services I	1.4	3.8	4.43	.8285	.0000
Factor 7	Resort airport services	1.2	3.3	5.30	.6762	.0000
Factor 8	Language communication	1.0	3.0	5.73	.7427	.0000
Factor 9	Facilities and services II	1.0	2.7	5.40	.7749	.0009

Table D24: Impacts of Factor Items on Overall Satisfaction (German in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Facilities and activities I	.287	1.00	4.690	.0000
Cleanliness	.282	1.00	4.610	.0000
Accommodation services	.260	1.00	4.245	.0000
Hospitality and customer care	.200	1.00	3.267	.0013
Level of prices	.175	1.00	2.862	.0047
Facilities and services II	.174	1.00	2.844	.0050
Constant	5.659		90.749	.0000
R ² = .3313 Standard error = .848 F= 14.702 Sig F= .000				

Table D25: Impacts of Factor Items on Intention to Recommend (German in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Hospitality and customer care	.303	1.00	4.862	.0000
Cleanliness	.277	1.00	4.449	.0000
Accommodation services	.233	1.00	3.738	.0002
Level of prices	.184	1.00	2.958	.0035
Facilities and services I	.162	1.00	2.604	.0100
Facilities and services II	.146	1.00	2.351	.0198
Constant	5.902		76.261	.0000
R ² = .3059 Standard error = 1.005 F= 13.077 Sig F= .0000				

Table D26: Impacts of Factors on Intention to Revisit the same Resort (German in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Cleanliness	.321	1.00	5.055	.0000
Facilities and services I	.226	1.00	3.571	.0005
Accommodation service	.222	1.00	3.509	.0006
Facilities and services II	.178	1.00	2.810	.0055
Level of prices	.166	1.00	2.626	.0094
Hospitality and customer care	.135	1.00	2.137	.0340
Constant	5.237		48.478	.0000
R ² = .2821 Standard error = 1.469 F= 11.662 Sig F= .0000				

Table D27: Impacts of Factors on Intention to Visit Other Resorts (German in Mallorca)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Level of prices	.182	.999	2.523	.0125
Hospitality and customer care	.154	.999	2.138	.0339
Facilities and activities I	-.149	.999	-2.069	.0400
Constant	4.852		43.358	.0000
R ² = .0798 Standard error = 1.501 F= 5.089 Sig. F= .0021				

Table D28: Results of Factor analysis (British tourists visiting Turkey)

FACTOR 1: Hygiene, sanitation and cleanliness	FACTOR 5: Level of prices
1. Level of hygiene and sanitation overall (.771)	1. Level of food and beverage prices (.777)
2. Overall cleanliness of the resort (.751)	2. Level of souvenir and gift prices (.774)
3. Cleanliness of sea and beaches (.690)	3. Overall value for money (.700)
4. Availability of space on beaches (.627)	
5. Signposting to tourist attractions (.530)	
6. Availability of facilities on beaches (.495)	
7. Attractiveness of natural environment (.417)	
FACTOR 2: Hospitality and customer care	FACTOR 6: Local transport services
1. Attitude of shopkeepers towards foreign tourists (.757)	1. Level of local transport prices (.789)
2. Attitude of local people towards female tourists (.757)	2. Frequency of local transport services (.773)
3. Friendliness of local people (.662)	3. Attitude of drivers towards foreign tourists (.594)
4. Attitude of staff overall (.647)	4. Comfort of local transport services (.489)
5. Attitude of staff at resort's bars and restaurants (.625)	
6. Feelings of personal safety and security (.565)	
FACTOR 3: Accommodation services	FACTOR 7: Resort airport services
1. Cleanliness of accommodation (.785)	1. Speed of check-in and out services at the resort airport (.823)
2. Security of rooms at accommodation (.741)	2. Availability of facilities and services at the resort airport (.806)
3. Adequacy of water and electricity at accommodation (.722)	3. Cleanliness of the resort airport (.795)
4. Signposting to public places at accommodation (.701)	
5. Speed of check-in and out at accommodation (.642)	
6. Level of English language at accommodation (.598)	
FACTOR 4: Facilities and activities	FACTOR 8: Nightlife and entertainment
1. Availability of health services (.747)	1. Quality of food at resort's bars and restaurants (.688)
2. Availability of sport facilities and activities (.697)	2. Level of English language at resort's bars and restaurants (.543)
3. Availability of facilities for children (.650)	3. Availability of shopping facilities (.510)
4. Availability of daily tours to other resorts and tourist attractions (.522)	4. Cleanliness of resort's bars and restaurants (.433)
	5. Suitability of nightlife and entertainment (.430)
Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .92116	
Bartlett Test of Sphericity = 6261.2270	
Significance = .0000	

Table D29: Results of Factor Analysis (British Tourists in Turkey)

Factors	Factor Labels	E. value	Percent of variance	Mean	Alpha	p
Factor 1	Hygiene, sanitation and cleanliness	13.2	33.9	5.74	.8579	.0000
Factor 2	Hospitality and customer care	2.4	6.4	6.02	.8688	.0000
Factor 3	Accommodation services	2.3	6.0	5.97	.8412	.0000
Factor 4	Facilities and activities	1.8	4.7	5.37	.7597	.0000
Factor 5	Level of prices	1.6	4.2	6.08	.8148	.0000
Factor 6	Local transport services	1.4	3.7	5.94	.7857	.0000
Factor 7	Resort airport services	1.3	3.4	5.67	.7985	.0000
Factor 8	Nightlife and entertainment	1.1	2.8	6.09	.7641	.0000

Table D30: Impacts of Factor Items on Overall Satisfaction (British in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig. t
Accommodation services	.387	.999	8.599	.0000
Level of prices	.295	.999	6.570	.0000
Hospitality and customer care	.264	.999	5.869	.0000
Hygiene, sanitation and cleanliness	.242	.999	5.375	.0000
Nightlife and entertainment	.184	.999	4.091	.0001
Facilities and activities	.152	.999	3.391	.0008
Local transport services	.098	.999	2.191	.0293
Constant	6.474		161.738	.0000
R ² = .4381 Standard error = .6756 F = 30.852 Sig. F = .0000				

Table D31: Impacts of Factor Items on Intention to Recommend (British in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig. t
Hospitality and customer care	.359	.997	7.946	.0000
Accommodation services	.319	.997	7.057	.0000
Level of prices	.263	.999	5.819	.0000
Nightlife and entertainment	.251	.998	5.555	.0000
Hygiene, sanitation and cleanliness	.148	.998	3.290	.0011
Local transport services	.138	.999	3.058	.0024
Facilities and activities	.134	.999	2.975	.0032
Resort airport services	.115	.993	2.546	.0114
Constant	6.457		143.890	.0000
R ² = .4360 Standard error = .757 F = 26.678 Sig. F = .0000				

Table D32: Impacts of Factor Items on Intention to Revisit Same Resort (British in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig. t
Level of prices	.313	.999	6.486	.0000
Hospitality and customer care	.298	.997	6.152	.0000
Nightlife and entertainment	.246	.998	5.094	.0000
Accommodation services	.216	.997	4.477	.0000
Facilities and activities	.182	.999	3.766	.0002
Hygiene, sanitation and cleanliness	.133	.998	2.754	.0063
Resort airport services	.107	.994	2.223	.0270
Constant	5.888		84.979	.0000
R ² = .3538 Standard error =1.167 F= 21.590 Sig. F= .0000				

Table D33: Impacts of Factor Items on Intention to Visit Other Resorts (British in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig. t
Hospitality and customer care	.231	.997	4.208	.0000
Resort airport services	.188	.996	3.436	.0007
Local transport services	.175	.999	3.190	.0016
Hygiene, sanitation and cleanliness	.161	.998	2.935	.0036
Level of prices	.131	.999	2.400	.0171
Nightlife and entertainment	.122	.998	2.232	.0264
Constant	5.537		78.314	.0000
R ² = .1717 Standard error = 1.187 F= 9.504 Sig. F= .0000				

Table D34: Results of Factor analysis (German tourists visiting Turkey)

FACTOR 1: Hygiene and Sanitation	FACTOR 2: Hospitality and customer care
<ol style="list-style-type: none"> 1. Level of hygiene and sanitation overall (.801) 2. Overall cleanliness of the resort (.766) 3. Cleanliness of sea and beaches (.724) 4. Availability of facilities on beaches (.527) 5. Availability of space on beaches (.492) 6. Cleanliness of the resort's bars and restaurants (.484) 7. Attractiveness of natural environment (.482) 	<ol style="list-style-type: none"> 1. Attitude of shopkeepers towards foreign tourists (.776) 2. Attitude of local people towards female tourists (.685) 3. Attitude of staff at food and beverage facilities (.659) 4. Friendliness of local people (.564) 5. Quality of food at resort's bars and restaurants (.475)
FACTOR 3: Language communication	FACTOR 4: Local transport services
<ol style="list-style-type: none"> 1. Level of German language overall (.861) 2. Level of German language at accommodation facilities (.643) 3. Level of German language at resort's bars and restaurants (.549) 4. Signposting to tourist attractions (.448) 	<ol style="list-style-type: none"> 1. Comfort of local transport services (.812) 2. Network of local transport services (.791) 3. Attitude of drivers towards foreign tourists (.694) 4. Feelings of safety and security (.563) 5. Availability of daily tours to attractions (.475)
FACTOR 5: Facilities and services	FACTOR 6: Level of prices
<ol style="list-style-type: none"> 1. Availability of facilities and activities for children (.734) 2. Suitability of nightlife and entertainment (.585) 3. Availability of sport facilities and activities (.582) 4. Availability of health services (.372) 	<ol style="list-style-type: none"> 1. Level of souvenir and gift prices (.821) 2. Level of food and beverage prices (.720) 3. Level of local transport prices (.654) 4. Availability of shopping facilities (.582)
FACTOR 7: Accommodation services	
<ol style="list-style-type: none"> 1. Security of room at accommodation (.816) 2. Cleanliness of accommodation (.720) 3. Signposting to public places at accommodation (.569) 4. Adequacy of water and electricity supply at accommodation (.439) 	
<p>Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .88342 Bartlett Test of Sphericity = 3483.4388 Significance = .0000</p>	

Table D35: Results of Factor Analysis (German Tourists in Turkey)

Factors	Factor Labels	E.value	Variance	Mean	Alpha	P
Factor 1	Hygiene, sanitation and cleanliness	10.9	33.0	5.52	.6346	.0000
Factor 2	Hospitality and customer care	2.6	8.1	5.60	.8262	.0000
Factor 3	Language communication	1.8	5.7	5.09	.8546	.0000
Factor 4	Local transport services	1.7	5.2	5.53	.7730	.0000
Factor 5	Facilities and activities	1.5	4.7	5.14	.7587	.0000
Factor 6	Level of prices	1.3	4.2	5.08	.7668	.0000
Factor 7	Accommodation services	1.1	3.5	5.74	.7884	.0000

Table D36: Impacts of Factor Items on Level of Overall Satisfaction (German in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Accommodation services	.370	1.00	7.203	.0000
Hospitality and customer care	.327	1.00	6.373	.0000
Level of prices	.317	1.00	6.163	.0000
Facilities and activities	.264	1.00	5.132	.0000
Local transport services	.249	1.00	4.842	.0000
Language communication	.199	1.00	3.882	.0001
Hygiene, sanitation and cleanliness	.165	1.00	3.206	.0016
Constant	6.105		7.203	.0000
R ² = .5445 Standard error = .575 F= 29.274 Sig. F= .0000				

Table D37: Impacts of Factor Items on Intention to Recommend (German in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Level of prices	.395	1.00	6.943	.0000
Hospitality and customer care	.381	1.00	6.692	.0000
Facilities and activities	.251	1.00	4.420	.0000
Local transport services	.171	1.00	3.018	.0029
Accommodation services	.160	1.00	2.815	.0054
Hygiene, sanitation and cleanliness	.136	1.00	2.399	.0175
Constant	6.311		2.815	.0000
R ² = .4389 Standard error = .717 F= 22.554 Sig. F= .0000				

Table D38: Impacts of Factors on Intention to Revisit Same Destination (German in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Level of prices	.356	1.00	6.124	.0000
Hospitality and customer care	.355	1.00	6.108	.0000
Facilities and activities	.285	1.00	4.904	.0000
Language communication	.198	1.00	3.406	.0008
Local transport services	.150	1.00	2.587	.0105
Hygiene, sanitation and cleanliness	.133	1.00	2.300	.0226
Constant	5.650		61.221	.0000
R ² = .4144 Standard error = 1.238 F= 20.407 Sig. F= .0000				

Table D39: Impacts of Factors on Intention to Visit Other Destinations (German in Turkey)

Factors	Std. Beta Coef.	Tolerance	t	Sig t
Level of prices	.258	.999	3.590	.0004
Hospitality and customer care	.176	.999	2.451	.0152
Constant	5.478		55.234	.0000
R ² = .0988 Standard error = 1.319 F= 9.544 Sig. F= .0001				

Table D40: Results of Factor analysis (All Sample Groups visiting Mallorca and Turkey)

1. Accommodation services	5. Availability of facilities and activities
1. Level of services at accommodation (.786)	1. Availability of sport facilities and activities (.688)
2. Cleanliness of accommodation (.754)	2. Availability of facilities and activities for children (.681)
3. Security of rooms at accommodation (.747)	3. Suitability of nightlife and entertainment (.623)
4. Signposting to bedrooms at accommodation (.682)	4. Availability of health services (.619)
5. Adequacy of water and electricity supply at accommodation (.673)	5. Availability of shopping facilities (.560)
6. Quality of food at accommodation (.665)	6. Availability of daily tours to other resorts and attractions (.539)
7. Speed of check-in and out services at accommodation (.569)	
2. Local transport services	6. Level of prices
1. Network of local transport services in the resort (.808)	1. Level of food and beverage prices (.801)
2. Frequency of local transport services in the resort (.802)	2. Level of souvenir and gift prices (.789)
3. Comfort of local transport services in the resort (.718)	3. Overall value for money (.690)
4. Attitude of local drivers towards tourists (.694)	4. Quality of food at the resort's bars and restaurants (.401)
5. Level of local transport service prices (.629)	
6. Variety of tourist attractions in the resort (.387)	
3. Hygiene and cleanliness	7. Language communication
1. Cleanliness of beaches and sea (.731)	1. Standard of English-German in the resort overall (.774)
2. Level of hygiene and sanitation overall (.724)	2. Adequacy of information in English-German in the resort overall (.696)
3. Overall cleanliness of the resort (.707)	3. Level of spoken language in English-German at accommodation facilities (.613)
4. Availability of space on beaches (.615)	4. Signposting to attraction and facilities in the resort (.482)
5. Availability of facilities on beaches (.541)	
6. Attractiveness of natural environment (.484)	
7. Feelings of personal safety and security (.433)	
4. Hospitality and customer care	8. Resort airport services
1. Attitudes of local shopkeepers towards tourists (.759)	1. Speed of check-in and out services at the resort airport (.797)
2. Attitudes of local people and staff towards female tourists (.700)	2. Availability of facilities and services at the resort airport (.766)
3. Attitudes of staff at the resort's bars and restaurants towards tourists (.676)	3. Travelling time between the resort airport and the resort (.644)
4. Friendliness of local people (.637)	
5. Attitudes of staff overall towards tourists (.590)	
6. Cleanliness of the resort's bars and restaurants (.472)	
Kaiser-Meyer-Olkin Measure of Sampling Adequacy = .948	
Bartlett Test of Sphericity = 23306.3	
Significance = .0000	

Table D41: Results of Factor Analysis for Four Sample Groups

Factors	Factor Labels	E value	Variance	Mean	Alpha	P
Factor 1	Accommodation services	15.7	35.8	5.73	.8789	.000
Factor 2	Local transport services	2.7	6.1	5.42	.8558	.000
Factor 3	Hygiene and cleanliness	1.9	4.5	5.55	.7863	.000
Factor 4	Hospitality and customer care	1.8	4.3	5.61	.8710	.000
Factor 5	Facilities and activities	1.6	3.8	5.32	.7906	.000
Factor 6	Level of prices	1.5	3.5	5.42	.8521	.000
Factor 7	Language communication	1.4	3.2	5.59	.8653	.000
Factor 8	Resort airport services	1.2	2.8	5.49	.5634	.000

Table D42: Comparison between Mallorca and Turkey by British Tourists (Accommodation Services)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Level of services at accommodation</i>	5.66	5.99	-4.29	.000	3.54
<i>Cleanliness of accommodation</i>	5.93	6.18	-3.45	.001	3.38
Adequacy of water and electricity supply at accommodation	6.02	5.80	2.91	.004	2.92
Speed of check-in and check-out at accommodation	5.94	6.07	-1.90	.058	3.48
Security of rooms at accommodation	5.87	5.99	-1.56	.119	3.20
Signposting to bedrooms and public places at accommodation	5.70	5.60	1.37	.172	3.10
Quality of food at accommodation	5.56	5.48	.81	.419	3.27
Average Mean Scores	5.81	5.87	1.54	.124	3.24

* Numbers in bold indicate that Mallorca performed significantly better than Turkey on that attribute. Numbers in italic indicate that Turkey performed significantly better than Mallorca.

Table D43: Comparison between Mallorca and Turkey by British Tourists (Facilities and Activities)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Availability of daily tour services to other resorts and attractions</i>	5.12	5.93	-11.54	.000	3.62
<i>Availability of shopping facilities</i>	5.53	6.08	-8.33	.000	3.49
<i>Suitability of nightlife and entertainment</i>	5.38	5.94	-7.30	.000	3.13
<i>Availability of sport facilities and activities</i>	5.01	5.29	-3.58	.000	3.14
Availability of facilities for children	5.22	4.90	3.35	.001	2.68
Availability of health services	5.29	5.29	-.08	.937	3.07
Average Mean Scores	5.25	5.57	-1.52	.089	3.18

* Numbers in bold indicate that Mallorca performed significantly better than Turkey on that attribute. Numbers in italic indicate that Turkey performed significantly better than Mallorca.

Table D44: Comparison between Mallorca and Turkey by British Tourists (Local Transport Services)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Frequency of local transport services</i>	5.31	6.32	-14.47	.000	4.30
<i>Level of local transport prices</i>	5.45	6.26	-12.87	.000	4.34
<i>Network (accessibility) of local transport services</i>	5.19	5.94	-10.37	.000	3.89
<i>Variety of tourist attractions</i>	4.93	5.65	-9.50	.000	3.63
<i>Comfort of local transport services</i>	5.09	5.56	-6.34	.000	3.19
<i>Attitude of local drivers</i>	4.94	5.60	-8.52	.000	3.52
<i>Average Mean Scores</i>	5.15	5.88	-10.61	.000	3.81

* Numbers in italic indicate that Turkey performed significantly better than Mallorca.

Table D45: Comparison between Mallorca and Turkey by British Tourists (Hospitality)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Friendliness of local people</i>	5.50	6.49	-15.27	.000	4.30
<i>Attitude of local shopkeepers</i>	5.17	5.90	-9.20	.000	3.63
<i>Attitude of staff in tourism overall</i>	5.48	6.01	-7.50	.000	3.68
<i>Attitude of staff at resort's bars and restaurants</i>	5.59	6.11	-6.63	.000	4.02
<i>Cleanliness of resort's bars and restaurants</i>	5.71	6.04	-5.71	.000	3.33
<i>Attitude of local people and staff towards female tourists</i>	5.27	5.52	-2.79	.005	3.15
<i>Average Mean Scores</i>	5.45	6.01	-6.15	.000	3.68

* Numbers in italic indicate that Turkey performed significantly better than Mallorca.

Table D46: Comparison between Mallorca and Turkey by British Tourists (Facilities and Services at the Resort Airport)

Attributes	Mallorca	Turkey	t value	P	Comparison
Availability of facilities and services at the resort airport	5.79	5.49	4.27	.000	2.95
Travelling time between the resort and the resort airport	5.55	5.23	4.79	.000	2.29
Speed of check-in and check-out at the resort airport	5.64	5.56	1.02	.310	3.32
Average Mean Scores	5.66	5.42	6.14	.000	2.85

* Number in bolds indicate that Mallorca performed significantly better than Turkey on these attributes.

Table D47: Comparison between Mallorca and Turkey by British Tourists (Hygiene, Sanitation and Cleanliness)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Attractiveness of natural environment</i>	5.47	6.00	-7.13	.000	3.54
<i>Cleanliness of beaches and sea</i>	5.67	5.86	-2.51	.012	3.10
<i>Availability of facilities on beaches</i>	5.45	5.63	-2.42	.016	3.20
<i>Feelings of personal safety & security</i>	5.86	5.99	-2.06	.040	3.59
Overall cleanliness of the resort	5.66	5.76	-1.55	.122	3.05
Availability of space on beaches	5.63	5.72	-1.14	.255	3.28
Level of hygiene and sanitation overall	5.63	5.56	.98	.326	2.79
Average Mean Scores	5.62	5.78	1.66	.097	3.22

* Numbers in bold indicate that Mallorca performed significantly better than Turkey on these attributes. Numbers in italic indicate that Turkey performed better than Mallorca.

Table D48: Comparison between Mallorca and Turkey by British Tourists (Level of Prices)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Level of souvenir and gift prices</i>	5.37	5.95	-9.28	.000	4.17
<i>Overall value for money</i>	5.89	6.34	-8.17	.000	4.18
<i>Quality of food at resort's bars and restaurants</i>	5.72	6.19	-7.25	.000	3.61
<i>Level of food and beverage prices</i>	5.51	5.93	-6.65	.000	4.08
Average Mean Scores	5.62	6.10	-5.16	.000	4.01

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D49: Comparison between Mallorca and Turkey by British Tourists (Level of Language Communication)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Level of English at resort's bars and restaurants</i>	5.77	6.17	-7.08	.000	3.25
<i>Level of English in the resort overall</i>	5.82	6.18	-6.02	.000	3.30
<i>Adequacy of written information in English</i>	5.63	5.95	-4.85	.000	3.18
Spoken language in English at accommodation facilities	5.99	6.04	-.82	.412	3.22
Signposting to attractions and facilities	5.57	5.57	.00	.999	2.91
Average Mean Scores	5.75	5.98	-1.07	.067	3.17

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D50: Comparison between Mallorca and Turkey by German Tourists (Accommodation Services)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Level of services at accommodation</i>	4.94	5.62	-7.86	.000	3.61
<i>Quality of food at accommodation</i>	5.20	5.83	-6.35	.000	3.38
<i>Security of rooms at accommodation</i>	5.33	5.80	-6.16	.000	3.24
<i>Cleanliness of accommodation</i>	5.35	5.80	-5.80	.000	3.17
<i>Signposting to bedrooms and public places at accommodation</i>	5.20	5.42	-2.57	.010	3.14
Speed of check-in and out at accommodation	5.82	5.80	.30	.764	3.31
Adequacy of water and electricity supply at accommodation	5.87	5.88	-.06	.949	3.13
<i>Average Mean Scores</i>	5.39	5.74	-3.91	.000	3.28

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D51: Comparison between Mallorca and Turkey by German Tourists (Hospitality and Customer Care)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Friendliness of local people</i>	5.41	6.06	-9.38	.000	3.84
<i>Attitude of staff in tourism</i>	5.24	5.60	-4.33	.000	3.37
<i>Cleanliness of resort's bars & restaurants</i>	5.22	5.45	-3.18	.002	3.05
<i>Attitude of staff at resort's bars and restaurants</i>	5.45	5.70	-2.99	.003	3.49
Attitude of local people and staff towards female tourists	5.26	5.31	-.58	.560	3.06
Attitude of local shopkeepers	5.16	5.12	.42	.677	3.01
<i>Average Mean Scores</i>	5.29	5.55	-3.24	.001	3.30

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D52: Comparison between Mallorca and Turkey by German Tourists (Local Transport Services)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Level of local transport service prices</i>	4.94	5.62	-7.86	.000	4.00
<i>Frequency of local transport services</i>	5.16	5.67	-6.50	.000	3.82
<i>Attitude of local drivers</i>	4.96	5.44	-5.86	.000	3.36
<i>Variety of tourist attractions</i>	4.72	5.08	-4.35	.000	3.57
<i>Comfort of local transport services</i>	4.89	5.23	-4.29	.000	3.24
<i>Network (accessibility) of local transport services</i>	5.10	5.43	-3.95	.000	3.57
<i>Average Mean Scores</i>	4.96	5.41	-5.86	.000	3.60

*Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D53: Comparison between Mallorca and Turkey by German Tourists (Availability of Facilities and Activities)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Availability of daily tour services to other resorts and attractions</i>	5.43	5.71	-4.01	.000	3.53
<i>Availability of sport facilities&activities</i>	5.09	5.36	-3.22	.001	3.25
Availability of facilities for children	5.09	4.88	2.02	.044	3.08
Availability of health services	5.18	5.11	.75	.455	2.84
Suitability of nightlife&entertainment	5.22	5.20	.26	.794	2.81
Availability of shopping facilities	5.36	5.34	.24	.811	3.31
<i>Average Mean Scores</i>	<i>5.22</i>	<i>5.26</i>	<i>1.97</i>	<i>.050</i>	<i>3.14</i>

* Numbers in bold indicate that Mallorca performed significantly better than Turkey. Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D54: Comparison between Mallorca and Turkey by German Tourists (Level of Hygiene, Sanitation and Cleanliness)

Attributes	Mallorca	Turkey	t value	P	Comparison
<i>Attractiveness of natural environment</i>	5.27	5.80	-6.53	.000	3.40
<i>Cleanliness of beaches and sea</i>	5.01	5.54	-6.03	.000	3.42
<i>Availability of space on beaches</i>	5.17	5.69	-5.60	.000	3.26
<i>Feelings of personal safety&security</i>	5.45	5.77	-4.97	.000	3.30
<i>Overall cleanliness of resort</i>	5.09	5.34	-3.30	.001	3.02
<i>Availability of facilities on beaches</i>	5.08	5.59	-3.08	.002	3.18
<i>Level of hygiene and sanitation</i>	4.90	5.11	-2.35	.019	3.01
<i>Average Mean Scores</i>	<i>5.13</i>	<i>5.54</i>	<i>-3.14</i>	<i>.002</i>	<i>3.22</i>

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D55: Comparison between Mallorca and Turkey by German Tourists (Level of Language Communication)

Attributes	Mallorca	Turkey	t value	P	Comparison
Adequacy of written information	5.51	5.14	4.65	.000	2.90
Spoken language in German at accommodation	5.50	5.09	4.16	.000	2.77
Level of German language in the resort overall	5.45	5.15	3.79	.000	2.72
Level of German language at resort's bars and restaurants	5.28	5.06	2.55	.011	2.81
Signposting to attractions&facilities	5.16	4.97	2.29	.022	2.79
<i>Average Mean Scores</i>	<i>5.38</i>	<i>5.08</i>	<i>5.15</i>	<i>.000</i>	<i>2.80</i>

* Numbers in bold indicate that Mallorca significantly performed better than Turkey on these attributes.

Table D56: Comparison between Mallorca and Turkey by German Tourists (Level of Prices)

Attributes	Mallorca	Turkey	t value	p	Comparison
<i>Overall value for money</i>	4.75	5.16	-5.11	.000	3.69
<i>Quality of food at resort's bars and restaurants</i>	5.29	5.66	-4.99	.000	3.21
<i>Level of souvenir and gift prices</i>	4.19	4.57	-4.43	.000	3.79
<i>Level of food and beverage prices</i>	4.43	4.75	-3.72	.000	3.70
<i>Average Mean Scores</i>	4.66	5.03	-4.29	.000	3.59

* Numbers in italic indicate that Turkey performed significantly better than Mallorca on that attribute.

Table D57: Comparison between Mallorca and Turkey by German Tourists (Facilities and Services at the Resort Airport)

Attributes	Mallorca	Turkey	t value	P	Comparison
Travelling time between the resort airport and the resort	5.50	5.05	5.86	.000	2.51
Availability of facilities and services at the resort airport	5.62	5.30	2.35	.019	2.88
Speed of check-in and out at the resort airport	5.61	5.46	1.92	.055	3.18
Average Mean Scores	5.57	5.27	4.55	.000	2.85

* Numbers in bold indicate that Mallorca performed significantly better than Turkey on these attributes.

Table D58: Comparison of Tourist Satisfaction Survey - British and German Tourists visiting Turkey (t test)

Destination Attributes	British	German	t value	Sig. t
ACCOMMODATION SERVICES	5.87	5.74	1.79	.073
Cleanliness of accommodation	6.18	5.80	5.96	.000
Level of services at accommodation	5.99	5.64	5.02	.000
Quality of food at accommodation	5.48	5.83	-4.04	.000
Speed of check-in and check-out at accommodation	6.07	5.80	3.91	.000
Security of rooms at accommodation	5.99	5.80	2.87	.004
Signposting to bedrooms and public places at accommodation	5.60	5.42	2.23	.026
Adequacy of water and electricity supply at accommodation	5.80	5.88	-1.06	.290
LOCAL TRANSPORT SERVICES	5.88	5.41	2.17	.030
Frequency of local transport services	6.32	5.67	9.90	.000
Level of local transport prices	6.26	5.62	9.07	.000
Variety of attractions	5.65	5.08	7.67	.000
Network (accessibility) of local transport services	5.94	5.43	7.09	.000
Comfort of local transport services	5.56	5.23	4.58	.000
Attitude of local drivers	5.60	5.44	2.18	.030
HYGIENE-SANITATION-CLEANLINESS	5.78	5.54	1.10	.912
Overall cleanliness of the resort	5.76	5.34	6.06	.000
Level of hygiene and sanitation overall	5.56	5.11	5.67	.000
Cleanliness of beaches and sea	5.86	5.54	4.15	.000
Feelings of personal safety and security	5.99	5.77	3.40	.001
Attractiveness of natural environment	6.00	5.80	2.83	.005
Availability of space on beaches	5.72	5.69	.45	.652
Availability of facilities on beaches	5.63	5.59	.26	.795
HOSPITALITY AND CUSTOMER CARE	6.01	5.54	4.40	.659
Cleanliness of resort's bars and restaurants	6.04	5.45	9.50	.000
Attitude of local shopkeepers	5.90	5.12	8.67	.000
Friendliness of local people	6.49	6.06	7.81	.000
Attitude of staff in tourism overall	6.01	5.60	5.61	.000
Attitude of staff at bars and restaurants	6.11	5.70	4.97	.000
Attitude of local people and staff towards female tourists	5.52	5.31	2.17	.030
FACILITIES AND ACTIVITIES	5.57	5.26	3.80	.702
Availability of shopping facilities	6.08	5.34	10.74	.000
Suitability of nightlife and entertainment	5.94	5.20	9.29	.000
Availability of daily tour services to other resorts and attractions	5.93	5.71	3.57	.000
Availability of health services	5.29	5.11	2.13	.033
Availability of sports facilities and activities	5.29	5.36	-.92	.358
Availability of facilities for children	4.90	4.88	.19	.849
LEVEL OF PRICES	5.92	5.07	12.170	.000
Level of souvenir and gift prices	5.95	4.57	19.51	.000
Overall value for money	6.34	5.16	19.00	.000
Level of food and beverage prices	5.93	4.75	15.87	.000
Quality of food at the resort's bars and restaurants	5.48	5.83	-4.04	.000
LANGUAGE COMMUNICATION	5.99	5.08	9.530	.000
Level of German-English at resort's bars and restaurants	6.17	5.06	16.08	.000
Level of German-English in the resort overall	6.18	5.15	14.41	.000
Spoken language in German-English at accommodation	6.04	5.09	11.06	.000
Signposting to attractions and facilities	5.57	4.97	7.54	.000
Adequacy of written information in German-English	5.95	5.14	10.58	.000
RESORT AIRPORT SERVICES	5.42	5.27	.010	.990
Travelling time between the resort airport and the resort	5.23	5.05	2.28	.023
Availability of facilities and services at the resort airport	5.49	5.30	1.47	.142
Speed of check-in and check-out at the resort airport	5.56	5.46	1.11	.269

Table D59: Comparison of Tourist Satisfaction Survey - British and German Tourists visiting Mallorca (t test)

Destination Attributes	British	German	t value	Sig. t
ACCOMMODATION SERVICES	5.81	5.42	3.73	.000
Level of services at accommodation	5.66	5.22	5.18	.000
Cleanliness of accommodation	5.93	5.35	6.96	.000
Security of rooms at accommodation	5.87	5.33	6.71	.000
Signposting to bedrooms and public places at accommodation	5.70	5.20	6.24	.000
Quality of food at accommodation	5.56	5.20	3.40	.001
Adequacy of water and electricity supply at accommodation	6.02	5.87	1.96	.051
Speed of check-in and check-out at accommodation	5.94	5.82	1.71	.088
LOCAL TRANSPORT SERVICES	5.15	4.96	.430	.668
Level of local transport prices	5.45	4.94	6.55	.000
Comfort of local transport services	5.09	4.89	2.54	.011
Variety of attractions	4.93	4.72	2.48	.013
Frequency of local transport services	5.31	5.16	1.83	.068
Network (accessibility) of local transport services	5.19	5.10	1.08	.282
Attitude of local drivers	4.94	4.96	-.26	.798
HYGIENE-SANITATION-CLEANLINESS	5.62	5.13	4.960	.000
Level of hygiene and sanitation overall	5.63	4.90	9.66	.000
Overall cleanliness of the resort	5.66	5.09	8.08	.000
Cleanliness of beaches and sea	5.67	5.01	7.88	.000
Availability of space on beaches	5.63	5.17	5.43	.000
Availability of facilities on beaches	5.45	5.08	4.42	.000
Attractiveness of natural environment	5.47	5.27	2.49	.013
Feelings of personal safety and security	5.86	5.45	6.17	.000
HOSPITALITY AND CUSTOMER CARE	5.45	5.29	1.520	.128
Cleanliness of resort's bars and restaurants	5.71	5.22	7.15	.000
Attitude of staff in tourism	5.48	5.24	2.95	.003
Attitude of staff at bars and restaurants	5.59	5.45	1.63	.103
Friendliness of local people	5.50	5.41	1.16	.247
Attitude of local people and staff towards female tourists	5.27	5.26	.18	.859
Attitude of local shopkeepers	5.17	5.16	.15	.879
FACILITIES AND ACTIVITIES	5.25	5.22	2.95	.003
Availability of daily tour services to other resorts and attractions	5.12	5.43	-4.07	.000
Availability of shopping facilities	5.53	5.36	2.32	.021
Suitability of nightlife and entertainment	5.38	5.22	1.86	.064
Availability of health services	5.29	5.18	1.43	.153
Availability of facilities for children	5.22	5.09	1.33	.184
Availability of sports facilities and activities	5.01	5.09	-.97	.332
LEVEL OF PRICES	5.62	4.66	13.720	.000
Overall value for money	5.89	4.75	16.46	.000
Level of souvenir and gift prices	5.37	4.19	15.58	.000
Level of food and beverage prices	5.51	4.43	14.07	.000
Quality of food at resort's restaurants and bars	5.72	5.29	5.75	.000
LANGUAGE COMMUNICATION	5.75	5.38	2.150	.032
Level of German-English at resort's bars and restaurants	5.77	5.28	7.02	.000
Spoken language in German-English at accommodation	5.99	5.50	6.23	.000
Signposting to attractions and facilities	5.57	5.16	5.82	.000
Level of German-English in the resort overall	5.82	5.45	5.49	.000
Adequacy of written information in English-German	5.63	5.51	1.80	.071
RESORT AIRPORT SERVICES	5.77	5.58	1.130	.261
Availability of facilities and services at the resort airport	5.79	5.62	2.57	.010
Travelling time between the resort airport and the resort	5.55	5.50	.57	.570
Speed of check-in and check-out at the resort airport	5.64	5.61	.39	.694

Table D60: Comments of British and German Sample to Improve Attributes

Attributes	Mallorca				Turkey			
	British (n=465)		German (n=468)		British (n=511)		German (n=430)	
	N	%	n	%	n	%	N	%
Overall cleanliness	69	14.83	134	28.63	75	14.67	97	22.55
Attitude of shopkeepers	68	14.62	34	7.26	72	14.09	104	24.18
Level of prices	50	10.75	160	34.18	33	6.45	98	22.79
Attitude of local people and staff	47	10.10	36	7.69	38	7.43	28	6.00
Food	45	9.67	95	20.20	42	8.21	48	11.16
Local transport	41	8.81	38	8.11	24	4.69	34	7.90
Natural environment	39	8.38	85	18.16	28	5.47	33	8.13
Signposting	37	7.95	82	17.52	67	13.11	77	17.90
Safety and security	32	6.88	49	10.47	36	7.04	20	4.65
Language communication	29	6.23	55	11.75	34	6.65	111	25.81
Quality of accommodation	28	6.02	87	18.58	36	7.04	53	12.32
Sport facilities and activities	27	5.80	54	11.53	27	5.28	35	8.13
Quality of services at bars and restaurants	26	5.59	35	7.47	12	2.34	18	4.18
Facilities and services at the resort airport	15	3.22	10	2.13	45	8.80	28	6.51
Air conditioning	6	1.29	0	0	15	2.93	0	0
Traffic road	6	1.29	0	0	5	0.97	0	0
Cleanliness of beaches	4	0.86	15	3.20	3	0.58	1	0.23
Toilets	4	0.86	1	0.21	6	1.17	5	1.16
Entertainment	3	0.64	2	0.42	0	0	0	0
Flight delays	2	0.43	0	0	4	0.78	0	0
Bins	2	0.43	0	0	5	0.97	3	0.69
Pavement	2	0.43	0	0	7	1.36	0	0
Water quality	2	0.43	0	0	0	0	0	0
Police	2	0.43	0	0	0	0	1	0.23
Transfer at the resort	1	0.21	1	0.21	0	0	1	0.23
Drivers	1	0.21	0	0	0	0	0	0
Prices at the resort airport	1	0.21	0	0	2	0.39	1	0.23
Busy & noisy	1	0.21	6	1.28	2	0.39	3	0.69
Attitude towards women	0	0	0	0	7	1.36	3	0.69
Telephone boxes	0	0	0	0	1	0.19	0	0
Hassle	0	0	0	0	31	6.06	4	0.93
Children activities	0	0	2	0.42	3	0.58	1	0.23
Electric supply	0	0	0	0	3	0.58	0	0
Activities for disabled people	0	0	0	0	1	0.19	0	0
Airport tax	0	0	0	0	1	0.19	0	0
Fewer hotels	0	0	1	0.21	0	0	0	0
Pool water quality	0	0	1	0.21	0	0	0	0

Table D61: Repeat Tourists' Perceptions of Positive (better) Changes in Mallorca and Turkey

Attributes	Mallorca (n=130)		Turkey (n=51)	
	N	%	n	%
Resort airport	51	39.2	3	5.8
Road and traffic conditions	56	22.3	6	11.7
Cleanliness	14	10.7	6	11.7
People	8	6.1	2	3.9
Accommodation facilities	5	3.8	1	1.9
Shopping facilities	5	3.8	0	0
Other facilities	5	3.8	1	1.9
Language	4	3.0	1	1.9
Service	4	3.0	1	1.9
Family oriented	3	2.3	0	0
Exchange rates	3	2.3	2	3.9
Food	3	2.3	1	1.9
Value for money	3	2.3	1	1.9
Facilities on beaches	3	2.3	0	0
Beaches	2	1.5	0	0
Air conditioning	2	1.5	2	3.9
Water quality	1	0.7	0	0
Safety	1	0.7	0	0
Nightlife/entertainment	1	0.7	1	1.9
Well organised	0	0	1	1.9

Table D62: Repeat Tourists' Perceptions of Negative (worse) Changes in Mallorca and Turkey

Attributes	Mallorca (n=130)		Turkey (n=51)	
	N	%	n	%
Busier	21	16.1	3	5.8
More commercialised	8	6.1	16	31.3
Overdevelopment	8	6.1	0	0
More expensive	8	6.1	2	3.9
More German influence	6	4.6	0	0
More young people oriented	6	4.6	0	0
More buildings	6	4.6	4	7.8
More traffic problems	5	3.8	1	1.9
Dirtier	4	3.0	2	3.9
Food	1	0.7	0	0
Untidy	1	0.7	0	0
Litter	1	0.7	0	0
Toilets	1	0.7	0	0
Exchange rate	1	0.7	0	0
People	1	0.7	1	1.9
Accommodation facilities	1	0.7	0	0
Resort airport	0	0	1	1.9

Table D63: Total Spending by British Tourists

Sterling	Mallorca		Turkey	
	N	%	n	%
1-249	39	9.5	44	10.1
250-499	138	33.5	132	30.2
500-749	118	28.6	129	29.5
750-999	43	10.4	60	13.7
1000 over	74	18.0	72	16.5
Total	412	100	437	100
X ² = 3.024 d.f.=4 Sig= .553				

Table D64: Spending on Food and Beverage by British Tourists

Sterling	Mallorca		Turkey	
	N	%	n	%
0	53	12.9	65	14.9
1-249	132	32.0	178	40.7
250-499	128	31.1	133	30.4
500-749	63	15.3	47	10.8
750-999	26	6.3	13	3.0
1000 over	10	2.4	1	0.2
Total	412	100	437	100
X ² = 21.448 d.f.= 5 Sig=.0006				

Table D65: Spending on Souvenirs and Gifts by British Tourists

Sterling	Mallorca		Turkey	
	N	%	N	%
0	72	17.5	87	19.9
1-99	177	43.0	216	49.4
100-199	109	26.5	83	19.0
200-299	36	8.7	29	6.6
300-399	10	2.4	5	1.1
400 over	8	1.9	17	3.9
Total	412	100	437	100
X ² = 17.742 d.f. = 5 Sig= .0173				

Table D66: Spending on Visiting attractions by British Tourists

Sterling	Mallorca		Turkey	
	N	%	N	%
0	228	55.3	236	54.0
<49	67	16.3	92	21.1
50-99	61	14.8	58	13.3
100-149	24	5.8	21	4.8
150 over	32	7.8	30	6.9
Total	412	100	437	100
X ² = 3.675 d.f. = 4 Sig= .4516				

Table D67: Spending on Clothes by British Tourists

Sterling	Mallorca		Turkey	
	N	%	N	%
0	303	73.5	183	41.9
1-49	46	11.2	79	18.1
50-99	35	8.5	84	19.2
100-149	14	3.4	40	9.2
150 over	14	3.4	51	11.7
Total	412	100	437	100
X ² = 91.441 d.f. = 4 Sig = .00000				

Table D68: Spending on Local Transportation by British Tourists

Sterling	Mallorca		Turkey	
	N	%	N	%
0	260	63.1	204	46.7
< 49	101	24.5	166	38.0
50-99	34	8.3	54	12.4
100-149	9	2.2	8	1.8
150 over	8	1.9	5	1.1
Total	412	100	437	100
X ² = 27.166 d.f. = 4 Sig = .00002				

Table D69: Spending on Day Trips by British Tourists

Sterling	Mallorca		Turkey	
	N	%	N	%
0	252	61.2	223	51.0
1-49	49	11.9	75	17.2
50-99	49	11.9	75	17.2
100-149	25	6.1	31	7.1
150 over	37	9.0	33	7.6
Total	412	100	437	100
X ² = 12.829 d.f. = 4 Sig = .0121				

Table D70: Total Spending by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	n	%
1-749	140	35.4	119	33.8
750-1499	127	32.1	113	32.1
1500-2249	80	20.2	73	20.7
2250-2999	13	3.3	14	4.0
3000 over	36	9.1	33	9.4
Total	396	100	352	100
X ² = 420 d.f.= 4 Sig=.9807				

Table D71: Spending on Food and Beverage by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	N	%
0	54	13.6	79	22.4
1-749	234	59.1	209	59.4
750-1499	78	19.7	48	13.6
1500-2249	15	3.8	11	3.1
2250-2999	15	3.8	5	1.4
Total	396	100	352	100
X ² = 16.336 d.f.= 4 Sig=.0026				

Table D72: Spending on Souvenirs and Gifts by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	N	%
0	141	35.6	123	34.9
1-299	1908	50.0	156	44.3
300-599	40	10.1	32	9.1
600-999	11	2.8	21	6.0
1000 over	6	1.5	20	5.7
Total	396	100	352	100
X ² = 15.227 d.f.= 4 Sig=.0042				

Table D73: Spending on Visiting Attractions by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	n	%
0	211	53.3	247	70.2
1-149	99	25.0	69	19.6
150-299	50	12.6	21	6.0
300-449	20	5.1	8	2.3
450 over	16	4.0	7	2.0
Total	396	100	352	100
X ² = 26.198 d.f.= 4 Sig=.00003				

Table D74: Spending on Clothes by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	N	%
0	277	69.9	186	52.8
1-149	75	18.9	53	15.1
150-299	13	5.8	41	11.6
300-449	9	2.3	27	7.7
450 over	12	3.0	45	12.8
Total	396	100	352	100
X ² = 52.427 df= 4 Sig=.00000				

Table D75: Spending on Local Transportation Services by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	n	%
0	277	69.9	197	56.0
1-149	91	23.0	117	33.2
150-299	21	5.3	28	8.0
300-449	3	0.8	5	1.4
450 over	4	1.0	5	1.4
Total	396	100	352	100
X ² = 15.829 df= 4 Sig=.0032				

Table D76: Spending on Daily Tours by German Tourists (DM)

DM	Mallorca		Turkey	
	n	%	n	%
0	149	37.6	138	39.2
1-149	96	24.2	73	20.7
150-299	69	17.4	79	22.4
300-449	29	7.3	29	8.2
450 over	53	13.4	33	9.4
Total	396	100	352	100
X ² = 6.312 df= 4 Sig=.1770				

Table D77. Results of Regression Analysis (British tourists)

Variable	British in Mallorca		British in Turkey	
	beta	t	beta	t
Booking in advance of minimum seven months			.138	2.623**
Income (£30000-£44999)			.123	2.522*
Length (7 days)			-.244	-4.618***
Length (8-13 days)	.138	2.478*		
Length (14 days)	.386	6.816***		
People in the party (1 person)	-.132	-2.580*	-.441	-6.282***
People in the party (2 persons)			-.227	-3.227**
People in the party (4 persons)	.134	2.521*		
Type of holiday (All-inclusive)	-.184	-3.483***		
Type of accommodation (Hotels)	-.208	-3.805***		
Age (45-54)			.154	3.121**
Cost of package tour (600 and over)			-.099	-2.022*
Intercept	467.51	20.093***	543.83	14.241***
R ²		.30		.30

* p<.05

** p<.01

*** p<.001

Table D78. Results of Regression Analysis (German tourists)

Variable	German in Mallorca		German in Turkey	
	beta	t	beta	t
Booking in advance of seven months and over	.110	2.201*		
Income (0-29,999DM)	-.155	-3.099**		
Length (A week)	-.211	-4.243***	-.174	-3.174**
Length (Two weeks)			.223	4.233***
Cost of package tour per person (700-1299 DM)			-.147	-2.741**
Cost of package tour per person (1,900 DM and over)	.125	2.556*		
People in the party (1 person)	-.164	-3.221**	-.191	-3.578***
People in the party (4 persons)	.144	2.874**	.169	3.192**
Type of holiday (All-inclusive)	-.253	-4.863***		
Type of holiday (H/B)	-.238	-4.749***		
Repeat tourists			.110	2.128*
Intercept	1781.51	15.187***	1364.61	17.151***
R ²		.29		.29

* p<.05

** p<.01

*** p<.001

Table D79: Attributes found to be better in Turkey (Open-ended Questionnaire n = 166)

Items	Greece	Spain	Grand Canary	Portugal	Baleares	Malta	France	Italy	Cyprus	Tunisia	Egypt	Total Med.	% Med.	Canada & US	Others	Total	%
Hospitality	28	9	5	3	11	3	2	3	5	1	2	72	43.3	2	12	86	51.8
Level of prices	8	4	12	4	7	1	2	3	1	0	1	43	25.9	2	12	57	34.3
Weather	8	6	4	4	1	0	1	0	1	0	0	25	15.0	2	2	29	17.4
More to do and see	6	3	5	2	3	1	0	0	2	0	1	23	13.8	0	2	25	15.0
Overall cleanliness	4	2	5	0	3	0	0	0	1	1	1	17	10.2	0	4	21	12.6
Scenery	1	6	3	1	3	2	0	0	1	0	0	17	10.2	0	2	19	11.4
Food	7	4	0	1	3	2	0	0	0	0	0	17	10.2	0	2	19	11.4
Value for money	4	2	3	0	1	1	1	0	1	0	0	13	7.8	1	0	14	8.4
Nightlife and entertainment	3	2	0	0	0	0	2	0	0	0	1	8	4.8	1	0	9	5.4
Not commercialised	2	0	2	1	2	0	0	0	0	0	1	8	4.8	0	0	8	4.8
Accommodation facilities	3	0	1	0	1	0	0	0	1	0	0	5	3.0	0	2	8	4.8
Quiet	1	-	1	2	3	0	0	0	0	0	0	7	4.2	0	0	7	4.2
Cleanliness of beaches&sea	1	1	2	2	1	0	0	0	0	0	0	7	4.2	0	0	7	4.2
Culture	0	2	2	0	0	1	1	0	1	0	0	7	4.2	0	0	7	4.2
Shopping facilities	2	2	0	0	0	0	0	0	0	0	4	4	2.4	1	0	5	3.0
Restaurants	1	0	0	0	2	0	0	0	0	0	0	3	1.8	1	0	4	2.4
Safety and security	0	0	1	0	0	0	0	0	0	0	1	2	1.2	0	2	4	2.4
Transport services	4	0	0	0	0	0	0	0	0	0	0	4	2.4	0	0	4	2.4
Atmosphere	0	0	2	0	0	0	1	0	0	0	0	3	1.8	0	1	4	2.4
Overall services in the resort	0	0	0	0	0	0	1	1	0	0	0	2	1.2	0	1	3	1.8
Access to UK	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	3	1.8
Standard of facilities	0	1	0	1	0	0	1	0	0	0	0	3	1.8	0	0	3	1.8
Water supply	1	0	0	0	0	0	0	0	0	0	0	1	0.6	0	1	2	1.2
Language communication	1	0	1	0	0	0	0	0	0	0	0	2	1.2	0	0	2	1.2
Watersports	2	0	0	0	0	0	0	0	0	0	0	2	1.2	0	0	2	1.2
Large resorts	0	0	0	0	0	0	0	0	0	0	0	1	0.6	0	0	1	0.6

Table D80: Attributes found to be worse in Turkey (Open-ended Questionnaire n= 166)

Items	Greece	Spain	Grand Canary	Portugal	Baleares	Mallorca	France	Italy	Cyprus	Tunisia	Egypt	Total Med.	% Med	Canada & US	Others	Total	%
Hassle	13	6	14	4	5	2	2	1	1	1	2	51	30.7	2	4	57	34.3
Road and traffic conditions	6	2	4	1	1	0	0	1	1	0	0	16	9.6	0	2	18	10.8
Overall cleanliness	2	2	5	1	0	0	0	0	0	1	0	11	6.6	0	3	14	8.4
Cleanliness of beaches & sea	3	3	0	1	1	0	2	0	0	0	0	10	6.0	0	1	11	6.6
Air-conditioning	0	2	2	0	0	0	0	1	1	0	0	6	3.6	0	2	8	4.8
Weather	0	2	2	0	2	0	0	0	0	0	0	6	3.6	0	1	7	4.2
Resort airport	2	0	0	0	1	0	0	0	0	0	0	3	1.8	1	3	7	4.2
Noise and crowd	0	0	0	1	0	2	0	1	0	0	0	4	2.4	0	2	6	3.6
Commercialised	4	0	1	0	0	0	0	0	0	0	0	5	3.0	0	1	6	3.6
Accommodation facilities	1	0	3	0	0	0	0	0	0	0	0	4	2.4	0	1	5	3.0
Toilet facilities	0	2	0	1	1	1	0	0	0	0	0	5	3.0	0	0	5	3.0
Food	0	0	2	0	0	1	0	0	0	0	0	3	1.8	0	0	3	1.8
Less to do and see	0	0	0	0	0	0	0	0	1	0	0	1	0.6	1	1	3	1.8
Water quality	0	0	0	0	1	0	0	1	0	0	0	2	1.2	0	1	3	1.8
Level of prices	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	1.2
Nothing for children	0	1	1	0	0	0	0	0	0	0	0	2	1.2	0	0	2	1.2
Untidy	1	0	0	0	1	0	0	0	0	0	0	2	1.2	0	0	2	1.2
Watersports	0	0	1	1	0	0	0	0	0	0	0	2	1.2	0	0	2	1.2
Safety and security	0	0	1	0	0	0	0	0	0	0	0	1	0.6	0	0	1	0.6
Long flight	0	1	0	0	0	0	0	0	0	0	0	1	0.6	0	0	1	0.6
Signposting overall	0	0	0	0	0	0	0	1	0	0	0	1	0.6	0	0	1	0.6
Standard of facilities	0	0	1	0	0	0	0	0	0	0	0	1	0.6	0	0	1	0.6
Attitude towards women	1	0	0	0	0	0	0	0	0	0	0	1	0.6	0	0	1	0.6

Table D81: Attributes found to be better in Mallorca (Open-ended Questionnaire n=194)

Items	Greece	Spain	Gran Canaria	Portugal	Turkey	Malta	France	Italy	Cyprus	Tunisia	Menorca	Ibiza	Total Med	%	US	Other	Total	%
Overall cleanliness	7	3	6	3	6	1	0	0	1	2	3	3	35	18.0	0	2	37	19.0
Level of prices	4	2	1	3	1	1	6	1	3	0	1	0	23	11.8	6	7	36	18.5
Hospitality (people)	2	5	5	4	4	0	5	0	1	2	3	2	33	17.0	0	2	35	18.0
Beaches and sea	3	2	7	5	3	0	1	0	2	0	1	4	28	14.4	1	2	31	15.9
Weather	2	0	4	7	0	0	3	1	0	0	0	1	18	9.2	2	5	25	12.8
More to do and see	7	0	5	1	1	0	0	1	0	0	4	2	21	10.8	0	2	23	11.8
Food	3	1	1	1	0	2	6	1	1	0	1	5	20	10.3	0	2	22	11.3
Nightlife&entertainment	1	0	3	3	1	2	0	0	1	1	2	1	15	7.7	2	3	20	10.3
Scenery	3	1	2	2	0	1	0	0	3	0	1	0	13	6.7	3	0	16	8.2
Family resort	1	3	3	1	0	0	0	0	1	0	0	2	11	5.6	1	2	14	7.2
Local transport	2	2	0	2	2	1	0	0	0	0	0	0	9	4.6	0	3	12	6.1
Standard of facilities	2	0	1	3	1	0	0	0	0	3	0	0	10	5.1	2	0	12	6.1
Accommodation facilities	0	0	2	3	1	0	0	0	0	1	2	3	12	6.1	0	0	12	6.1
Access to UK	0	0	2	0	0	0	0	0	1	0	0	0	3	1.5	3	4	10	5.1
Shopping facilities	1	0	3	4	0	1	0	0	0	1	0	0	10	5.1	0	0	10	5.1
Restaurants	0	2	1	1	0	0	1	0	0	1	0	0	6	3.0	3	0	9	4.6
Resort/Airport	3	2	1	1	0	1	0	0	0	1	0	0	9	4.6	0	0	9	4.6
Facilities for children	0	2	1	1	0	0	1	0	2	0	1	0	8	4.1	0	0	8	4.1
Atmosphere	1	0	1	1	0	0	2	0	0	0	0	0	5	2.5	2	0	7	3.6
Quiet	1	2	0	1	0	0	0	0	0	0	0	2	6	3.0	0	0	6	3.0
Language communication	0	1	1	2	0	0	0	1	1	0	0	0	6	3.0	0	0	6	3.0
Large resort	0	0	0	1	0	0	0	0	0	0	4	0	5	2.5	0	0	5	2.5
Small resort	0	0	1	1	0	0	1	0	0	0	0	0	3	1.5	1	0	4	2.0
Less commercialised	0	1	1	1	0	0	0	0	0	0	0	0	3	1.5	0	0	3	1.5
Safety and security	0	0	0	0	0	0	0	0	0	1	0	0	1	0.5	2	0	3	1.5
Road&traffic conditions	0	0	0	2	0	1	0	0	0	0	0	0	3	1.5	0	0	3	1.5

Table D82: Attributes found to be worse in Mallorca (Open-ended Questionnaires n=194)

Items	Greece	Spain	Grand Canary	Portugal	Turkey	Malta	France	Italy	Cyprus	Tunisia	Menorca	Ibiza	Total Med	%	US	Other	Total	%
Commercialised	5	1	3	2	1	0	4	2	1	1	4	3	27	13.9	4	4	35	18.0
Overcrowded	2	1	1	4	0	1	3	1	0	1	2	1	17	8.7	5	1	23	11.8
Noisy	1	2	3	2	1	1	0	1	0	1	1	1	14	7.2	3	2	19	9.7
Level of prices	1	1	4	4	0	0	1	0	1	0	2	0	14	7.2	0	2	16	8.2
Dirty (cleanliness)	1	2	0	1	0	0	0	0	2	0	3	0	9	4.6	2	3	14	7.2
Nightlife&entertainment	0	1	4	1	1	0	0	0	0	0	0	1	8	4.1	2	2	12	6.1
Food	2	1	0	2	1	0	1	0	0	0	0	1	8	4.1	1	2	11	5.6
Hospitality (people)	1	0	3	0	1	0	1	0	0	1	1	0	8	4.1	0	2	10	5.1
Road&traffic conditions	0	1	0	1	1	1	1	0	1	0	1	0	7	3.6	1	0	8	4.1
Shopping facilities	0	1	0	1	0	0	0	1	0	0	0	2	5	2.5	1	0	6	3.0
Beaches and sea	2	0	0	0	0	0	0	0	2	0	0	0	4	2.0	1	0	5	2.5
Accommodation facilities	0	0	1	0	0	0	0	0	0	1	0	0	2	1.0	2	1	5	2.5
Local transport	0	0	0	0	1	0	0	0	0	0	1	0	2	1.0	1	1	4	2.0
Air-conditioning	0	0	0	0	1	1	0	0	1	0	0	0	3	1.5	0	1	4	2.0
Weather	1	0	1	0	1	0	0	0	0	0	0	0	3	1.5	0	0	3	1.5
Toilet facilities	0	1	1	1	0	0	0	0	0	0	0	0	3	1.5	0	0	3	1.5

Table D83: Attributes to be Considered while Choosing the Best Destination (Open-ended Questionnaire in Turkey n= 166)

Items	Turkey	Greece	Cyprus	Spain	Gran Canary	Tunisia	Malta	Total Med	% Med	US	Other	Total	%
Hospitality (people)	62	0	1	0	0	0	0	63	37.9	1	1	65	39.1
More to do and see	22	0	0	1	0	0	0	23	13.8	1	0	24	14.4
Weather	14	0	0	1	0	0	0	15	9.0	1	0	16	9.6
Level of prices	15	0	0	0	0	0	0	15	9.0	0	0	15	9.0
Overall cleanliness	8	0	0	0	1	1	0	10	6.0	3	1	14	8.4
Value for money	12	0	0	0	0	0	0	12	7.1	1	1	14	8.4
No hassle	1	4	1	2	2	1	0	11	6.6	1	1	13	7.8
Nightlife and entertainment	10	0	0	0	0	0	1	11	6.6	1	0	12	7.2
No commercialised	6	2	0	0	0	0	0	8	4.8	0	2	10	6.0
Accommodation facilities	7	0	0	0	0	1	0	8	4.8	0	2	10	6.0
Scenery	9	0	0	0	0	0	0	9	5.4	0	0	9	5.4
Food	8	0	0	0	1	0	0	9	5.4	0	0	9	5.4
Culture and history	6	1	0	0	0	0	0	7	4.2	0	0	7	4.2
Beaches and sea	2	1	0	1	0	0	0	4	2.4	0	0	4	2.4
Safety and security	3	0	0	0	0	0	0	3	1.8	0	0	3	1.8
Language communication	1	0	0	0	0	0	1	2	1.2	1	0	3	1.8
Standard of facilities	3	0	0	0	0	0	0	3	1.8	0	0	3	1.8
Quiet	2	0	0	0	0	0	0	2	1.2	0	0	2	1.2
Atmosphere	1	0	0	0	0	0	0	1	0.6	0	1	2	1.2

Table D84: Attributes to be Considered while Choosing the Best Destination (Open-ended Questionnaire in Mallorca n= 194)

Items	Mallorca	Tunisia	Turkey	Spain	Greece	Malta	Ibiza	Menorca	Gran Canaria	Cyprus	Portugal	France	Italy	Med	US	Other	Total	%
Hospitality (people)	22	1	0	2	0	0	1	1	2	0	0	0	0	29	14.9	3	32	16.4
More to do and see	20	0	0	2	0	0	1	1	1	1	1	1	0	28	14.4	2	30	15.4
Beaches and sea	19	0	0	1	1	0	0	1	0	1	0	0	0	23	11.8	0	23	11.8
Level of prices	13	0	0	2	0	0	1	1	1	0	0	0	0	18	9.2	1	21	10.8
Family oriented	18	0	0	0	1	0	0	0	0	0	0	0	0	19	9.7	2	21	10.8
Accommodation facilities	16	0	0	0	0	0	0	0	0	1	0	0	0	17	8.7	1	19	9.7
Overall cleanliness	13	0	0	2	0	0	0	2	0	0	0	0	0	17	8.7	0	18	9.7
No or less commercialised	2	1	0	0	1	1	4	0	0	0	2	0	0	11	5.6	0	14	7.2
Relaxed atmosphere	8	0	0	2	0	0	0	0	1	0	0	0	0	11	5.6	0	11	5.6
Standard of facilities	8	0	1	0	0	0	0	0	0	0	0	0	0	9	4.6	0	9	4.6
Quiet	1	0	0	1	1	0	1	1	0	0	1	0	0	6	3.0	1	8	4.1
Food	5	0	0	0	0	0	0	0	0	1	1	0	0	7	3.6	1	8	4.1
Facilities for children	3	0	0	2	0	0	0	0	0	0	1	0	0	6	3.0	1	7	3.6
Weather	4	0	0	0	0	0	0	0	1	0	0	1	0	6	3.0	0	7	3.6
Access to UK	5	0	0	0	0	0	0	0	0	0	0	0	0	5	2.5	5	5	2.5
Culture	2	0	0	0	0	0	0	0	0	0	0	1	0	3	1.5	0	3	1.5
Available for all ages	5	0	0	0	0	0	0	0	0	0	0	0	0	5	2.5	0	5	2.5
Safety and security	4	0	0	0	0	0	0	0	0	0	0	0	0	4	2.0	0	4	2.0
Shopping facilities	2	0	0	0	0	0	1	0	1	0	0	0	0	4	2.0	0	4	2.0
Restaurants	4	0	0	0	0	0	0	0	0	0	0	0	0	4	2.0	0	4	2.0
British oriented	3	0	0	0	0	0	0	0	1	0	0	0	0	4	2.0	0	4	2.0
Nightlife&entertainment	1	0	0	0	0	0	1	0	0	0	0	0	0	2	1.0	0	3	1.5
Services	2	0	0	0	0	0	0	0	0	0	0	0	0	2	1.0	1	3	1.5
Small resorts	1	0	0	0	0	0	1	1	0	0	0	0	0	3	1.5	0	3	1.5
Scenery	1	0	0	0	0	0	0	0	0	0	0	0	1	2	1.0	0	2	1.0
Local transport	2	0	0	0	0	0	0	0	0	0	0	0	0	2	1.0	0	2	1.0
Language communication	0	0	0	0	0	0	0	0	0	1	1	0	0	2	1.0	0	2	1.0

Table D85: Competitiveness Set of Turkey and Mallorca

Destinations	Mallorca (n=194)			Turkey (n=166)		
	N	%	Rank	N	%	Rank
Canary Islands	54	27.8	1	43	25.9	2
USA	49	25.2	2	30	18.0	4
Greece	48	24.7	3	44	26.5	1
France	44	22.6	4	19	11.4	5
Spain	42	21.6	5	40	24.0	3
Ibiza	32	16.4	6	13	7.8	6
Menorca	27	13.9	7	5	3.0	17
Portugal	23	11.8	8	11	6.6	9
Cyprus	22	11.3	9	12	7.2	8
Italy	19	9.7	10	13	7.8	7
Turkey (Mallorca)	17	8.7	11	8	4.8	11
Malta	12	6.1	12	11	6.6	10
Caribbean	12	6.1	13	6	3.6	16
Tunisia	11	5.6	14	4	2.4	19
Austria	6	3.0	15	5	3.0	18
Germany	5	2.5	16	2	1.2	25
Canada	4	2.0	17	6	3.6	15
Mexico	4	2.0	18	4	2.4	20
Bulgaria	3	1.5	19	6	3.6	14
Belgium	3	1.5	20	3	1.8	22
Holland	3	1.5	21	7	4.2	13
Sweden	2	1.0	22	0	0	0
Denmark	2	1.0	23	0	0	0
Switzerland	2	1.0	24	0	0	0
Israel	2	1.0	25	2	1.2	27
Hong Kong	2	1.0	26	0	0	0
Thailand	2	1.0	27	4	2.4	21
Australia	1	.5	28	8	4.8	12
Indonesia	1	.5	29	2	1.2	28
Kenya	1	.5	30	2	1.2	29
Egypt	1	.5	31	3	1.8	24
Czech Republic	1	.5	32	3	1.8	23
South Africa	1	.5	33	2	1.2	30
Morocco	1	.5	34	0	0	0
India	0	0	0	3	1.8	25
China	0	0	0	2	1.2	31
Maldives	0	0	0	2	1.2	32

Note: As only one respondent from each sample destination had been to Singapore, Malaysia, Norway, Romania, Andorra, Sri Lanka, Mauritius, Bangladesh, Fiji, Gambia, Zambia and Tanzania, these places were excluded from the analysis of set.

Table D86: Accommodation Capacity by Types, Number of Establishments and Beds (Mallorca, 1996)

Type of Establishment	Number of Establishments	Number of Beds
Apartments	440	56,697
1 Key	165	10,171
2 Keys	168	22,861
3 Keys	105	22,783
4 Keys	2	882
Hotels	489	136,444
1 Star	61	7,680
2 Stars	97	19,897
3 Stars	271	87,609
4 Stars	55	20,183
5 Stars	5	1,075
Residence Hotels	36	2,763
1 Star	12	757
2 Stars	10	878
3 Stars	8	855
4 Stars	5	249
5 Stars	1	24
Rural Hotels	6	154
Apartment Hotels	95	40,067
1 Star	2	106
2 Stars	13	3,021
3 Stars	71	32,240
4 Stars	9	4,700
5 Stars	0	0
Residence Apartments	8	2,253
1 Star	3	385
2 Stars	2	976
3 Stars	2	690
4 Stars	1	202
5 Stars	0	0
Holiday Villages	11	7,562
Agrotourism	49	484
Camping	2	1,000
Hostels	128	8,010
1 Star	80	4,862
2 Stars	41	2,436
3 Stars	7	712
Residence Hostels	132	5,439
1 Star	86	3,424
2 Stars	43	1,882
3 Stars	3	133
Boarding Houses	23	639
Pensions	1	23
Fincas	9	291
Total	1,429	261,826

Source: Ministry of Tourism, Palma de Mallorca.

Table D87: Accommodation Capacity in Turkey by Types, Number of Establishments and Beds (1997)

Types of Establishments	Tourism Operation Licensed		Tourism Investment Licensed	
	Number of Establishments	Number of Beds	Number of Establishments	Number of Beds
Hotels	1,504	236,127	1,018	154,446
5 Stars	93	55,104	43	24,726
4 Stars	142	40,536	90	29,443
3 Stars	434	72,236	371	60,227
2 Stars	591	51,867	409	34,301
1 Star	211	13,738	88	4,560
Special Licence	33	2,646	17	1,189
Boat Hotels	5	1,177	N/A	N/A
Thermal Hotels	16	3,656	N/A	N/A
Apartment Hotels	33	2,768	N/A	N/A
Motels	40	2,931	34	1,697
Boarding Houses	211	6,729	166	5,400
Holiday Villages	81	51,176	67	33,579
Inns	3	1,515	3	265
Campsites	19	5,505	11	3,409
Golf Clubs	2	690	2	1,839
Total	1,914	312,274	1,301	200,635

Source: Ministry of Tourism, Ankara, Turkey.

Table D88: Distribution of Accommodation Capacity in Turkey by Regions (1997)

Regions	Establishments		Beds	
	Number	%	Number	%
Marmara	448	23.1	64,051	20.4
Aegean	599	31.0	96,105	30.6
Mediterranean	530	27.4	112,125	35.8
Central Anatolia	168	8.7	23,561	7.5
Black Sea	94	4.8	8,870	2.8
Eastern Anatolia	49	2.6	4,734	1.5
South-eastern Anatolia	45	2.4	3,942	1.3
Total	1,933	100	313,388	100

Source: Ministry of Tourism, Ankara, Turkey.

Table D89: Average Occupancy Rates of Accommodation Establishments in Turkey

Years	%
1990	48.1
1991	37.6
1992	49.8
1993	45.9
1994	39.1
1995	46.9
1996	51.2
1997	54.5

Source: Ministry of Tourism, Ankara, Turkey.

Table D90: Share of Foreign Tourist Arrivals in Mediterranean and World Tourism

Years	In Mallorca (*)	Share in Mediterranean (%)	Share in World Tourism (%)
1980	N/A	N/A	N/A
1985	3 358 200	2.93	0.87
1987	4 590 000	3.68	1.21
1988	4 668 000	3.52	1.16
1989	4 360 000	3.04	1.01
1990	4 099 000	2.71	0.89
1991	4 219 000	2.90	0.92
1992	4 192 000	2.65	0.87
1993	4 562 000	2.86	0.91
1994	5 345 000	3.16	0.99
1995	5 513 000	3.29	0.98
1996	6 238 100	3.57	1.04
1997	6 860 200	3.66	1.11

(*) Excluding same-day visitors

Source: Ministry of Tourism, Palma de Mallorca.

Table 91: Share of Foreign Tourist Arrivals in Mediterranean and World Tourism

Years	In Turkey (*)	Share in Mediterranean (%)	Share in World Tourism (%)
1965	361,758	N/A	0.32
1970	724,784	N/A	0.43
1975	1,540,904	N/A	0.69
1980	921,000	0.96	0.32
1985	2,230,000	1.94	0.68
1986	2,079,000	1.83	0.61
1987	2,468,000	1.97	0.67
1988	3,715,000	2.79	0.92
1989	3,921,000	2.95	0.90
1990	4,799,000	3.13	1.04
1991	5,158,000	3.46	1.12
1992	6,549,000	4.05	1.35
1993	5,904,000	3.65	1.18
1994	6,034,000	3.60	1.12
1995	7,083,000	4.23	1.26
1996	7,966,000	4.56	1.34
1997	9,689,004	5.17	1.55

(*) Excluding same-day visitors

Source: World Tourism Organisation, Madrid, Spain.

Table D92: Distribution of Foreign Tourist Arrivals in Mallorca by Nationality (%)

Country	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997
Germany	30.26	31.78	38.74	41.37	42.54	41.86	42.77	44.39	46.98	46.7
UK	33.01	35.04	30.55	27.55	29.68	31.25	31.71	29.41	28.13	28.8
France	10.49	10.41	7.34	7.84	6.09	5.94	5.31	4.99	4.79	3.92
Italy	1.29	3.62	2.145	2.34	2.75	2.77	2.17	1.88	1.49	1.38
Switzerland	2.74	3.97	4.02	4.20	4.37	3.81	3.42	3.11	2.54	2.59
Benelux	2.55	2.05	1.71	1.75	1.67	1.61	1.67	1.56	1.82	1.62
Sweden	4.87	2.11	3.77	3.97	6.11	2.46	2.30	2.27	2.32	2.67
Austria	0.29	1.07	1.21	1.52	1.46	1.41	1.43	1.50	1.47	1.46
Denmark	3.60	2.89	2.19	1.58	1.50	1.27	1.24	1.47	1.71	1.42
Norway	0.75	3.30	1.97	1.68	1.58	1.35	1.10	1.15	1.16	1.30
Ireland	1.36	0.70	0.78	0.82	0.88	1.12	1.26	1.55	1.56	1.38
Finland	0.89	1.36	1.26	1.03	0.48	0.27	0.25	0.23	0.32	0.35
Czechoslovakia	N/A	0.75								
Hungary	N/A	0.21								
Russia	N/A	0.22								
Poland	N/A	0.24								
Others	2.70	0.50	0.90	0.78	1.00	1.58	1.95	2.37	2.78	1.03

Source: Calculated from El Turisme a les Illes Balears, Dades Informatives, Any 1998. Govern Balear Conselleria de Turisme, Palma de Mallorca, 1999.

Table D93: Distribution of Major Foreign Tourist Arrivals in Turkey by Nationality (%)

Country	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997
Germany	0.84	11.45	18.07	14.13	16.46	18.26	14.90	21.43	24.86	24.13
UK	0.27	4.76	6.52	3.63	4.44	6.79	8.51	9.50	8.80	9.44
Austria	0.19	2.90	3.64	1.84	2.89	3.25	2.07	2.35	2.73	3.17
Benelux	0.16	1.96	3.83	2.58	3.97	4.71	3.85	4.03	3.85	4.26
Finland	0.23	0.49	1.93	1.45	1.47	1.48	1.17	1.32	1.44	1.11
Sweden	0.26	0.41	2.04	1.25	1.69	1.33	1.40	1.65	1.90	2.05
Norway	0.11	0.24	0.74	0.44	0.60	0.84	0.75	0.67	1.00	1.15
Denmark	0.29	0.33	0.64	0.58	0.90	1.22	1.14	1.35	1.71	1.53
France	4.90	5.73	5.76	2.12	3.49	4.63	3.49	3.25	2.92	3.44
Spain	N/A	0.72	1.15	0.45	0.66	0.97	0.59	0.37	0.55	0.63
Switzerland	1.02	1.38	1.41	0.75	1.11	1.27	0.71	0.81	0.82	0.91
Italy	3.10	2.86	2.90	1.16	2.23	2.07	1.58	1.40	1.85	2.14
Greece	0.63	8.16	4.22	2.51	2.07	2.27	1.90	1.99	1.71	1.75
USA	2.91	7.50	3.81	1.43	2.60	3.92	4.06	3.75	3.78	3.76
Japan	0.45	0.64	0.65	0.33	0.51	0.72	0.95	0.85	0.78	0.86
Israel	0.18	0.18	0.74	0.83	0.70	1.54	4.55	3.90	2.95	2.71
Bulgaria	1.91	0.75	1.34	17.09	11.57	5.67	2.55	2.08	1.61	2.26
Syria	N/A	2.05	2.09	2.17	1.73	1.81	1.78	1.44	1.07	1.02
Iran	3.75	13.52	4.70	4.58	2.12	1.84	3.46	4.67	4.38	3.42
Czechoslovakia	0.22	0.22	1.22	3.93	1.75	1.15	0.48	0.49	0.47	0.62
Hungary	1.66	1.41	3.19	2.98	2.09	1.52	0.42	0.20	0.17	0.23
USSR	0.03	0.44	4.14	13.26	17.53	17.95	21.43	17.42	18.37	15.62
Romania	0.29	0.49	7.00	9.13	8.00	4.78	6.21	3.66	2.22	3.49
Poland	2.24	3.36	3.83	3.33	1.58	0.79	0.60	0.43	0.43	0.52
Yugoslavia	1.03	14.00	6.04	2.87	2.19	2.61	1.78	0.90	1.21	1.55

Source: Ministry of Tourism, Ankara, Turk

Table D94: Average Length of Overnight Stay by Nationality -Mallorca- (1990-1997)

Country	1990	1991	1992	1993	1994	1995	1996	1997	Mean
Germany	13.53	12.36	12.31	11.90	12.03	11.95	12.05	11.50	12.20
UK	13.61	13.86	13.62	14.40	13.43	13.13	12.75	12.86	13.45
Austria	12.82	13.34	11.32	N/A	10.48	11.00	10.64	7.91	11.07
Benelux	11.70	12.23	13.03	N/A	12.18	13.01	13.16	11.60	12.41
France	12.12	10.32	10.58	10.80	9.12	9.47	9.34	10.71	10.30
Italy	9.20	10.26	8.56	9.40	9.32	10.32	10.65	8.28	9.49
Ireland	13.38	14.64	15.36	N/A	13.51	14.30	14.95	12.23	14.05
Switzerland	N/A	N/A	11.20	12.30	12.20	11.30	10.20	N/A	11.44

Grand mean: 11.80

Source: Ministry of Tourism, Palma de Mallorca.

Table D95: Average Length of Overnight Stay in Turkey by Nationality

Countries	1990	1991	1992	1993	1994	1995	1996	1997	Mean
Germany	4.87	5.80	7.30	6.50	7.53	5.86	5.67	5.80	6.16
UK	3.71	4.50	5.16	5.89	5.52	5.23	4.94	4.50	4.93
Austria	5.98	8.70	7.95	7.07	7.89	5.36	6.57	8.70	7.26
Benelux	3.30	4.40	4.52	4.64	4.61	4.88	4.13	4.40	4.36
Scandinavia	4.56	4.50	6.12	6.10	6.48	5.43	4.63	4.50	5.29
France	2.28	2.80	2.97	2.84	3.08	3.12	2.73	2.80	2.82
Spain	2.05	2.30	2.15	2.37	2.36	2.07	2.01	2.30	2.20
Switzerland	4.69	4.30	7.15	4.93	4.25	4.06	4.47	4.30	4.76
Italy	2.27	2.70	2.74	2.72	2.69	2.53	2.38	2.70	2.59
Greece	2.00	2.40	3.26	2.35	2.44	4.05	2.47	2.40	2.67
USA	2.22	2.20	2.46	2.37	2.52	2.07	1.91	2.20	2.24
Australia	1.91	2.20	2.40	2.24	2.19	1.98	2.03	2.20	2.14
Japan	1.74	1.70	1.74	1.57	1.62	1.49	1.50	1.70	1.63
Yugoslavia	1.68	N/A	2.01	2.02	2.16	2.72	1.84	2.20	2.09
Romania	2.33	N/A	2.00	2.23	2.13	1.82	2.16	3.00	2.23
USSR	2.25	N/A	2.32	3.06	3.71	3.72	3.85	4.10	3.28
Hungary	2.32	N/A	2.12	2.57	2.39	2.95	2.48	3.00	2.54
Poland	2.64	N/A	3.12	3.13	3.27	4.08	3.39	3.20	3.26

Grand mean: 3.56

Source: Ministry of Tourism, Ankara, Turkey.

Table D96: Distribution of Foreign Tourist Arrivals in Mallorca by Months (%)

Months	1989	1990	1991	1992	1993	1994	1995	1996	1997	Mean
January	2.05	1.70	1.55	1.53	1.52	1.40	1.56	1.58	1.49	1.60
February	2.21	2.20	1.79	2.00	1.87	2.10	2.18	2.57	2.32	2.13
March	4.03	3.60	3.44	3.11	2.77	3.90	3.35	4.48	4.58	3.69
April	6.52	7.40	5.03	6.16	5.51	6.40	7.38	6.90	6.22	6.39
May	12.57	11.70	11.19	12.05	11.37	14.20	12.25	12.31	12.63	12.25
June	13.24	13.90	13.50	13.92	12.94	14.00	14.07	13.70	13.35	13.62
July	15.38	16.00	15.62	15.08	15.95	16.50	15.29	14.35	14.40	15.40
August	15.85	15.20	16.99	16.99	16.88	14.50	14.78	15.44	16.06	15.85
September	14.05	14.90	15.42	14.84	15.25	14.10	14.42	14.16	13.46	14.51
October	10.47	9.60	11.75	11.21	12.59	9.70	10.87	10.54	11.26	10.88
November	1.99	1.80	2.19	1.72	1.94	1.50	2.13	2.38	2.62	2.03
December	1.59	2.00	1.47	1.33	1.34	1.70	1.67	1.54	1.53	1.57

Source: Ministry of Tourism, Palma de Mallorca.

Table D97: Distribution of Foreign Tourist Arrivals in Turkey by Months (%)

Months	1989	1990	1991	1992	1993	1994	1995	1996	1997	Mean
January	2.46	2.13	2.86	2.94	3.24	4.00	3.54	3.29	3.11	3.05
February	2.82	2.65	2.84	3.60	4.20	4.51	3.91	3.76	3.24	3.50
March	5.62	4.49	5.35	4.76	5.28	5.91	4.76	6.23	5.73	5.34
April	7.73	7.97	6.81	8.18	8.90	7.02	6.92	6.45	6.60	7.39
May	10.74	9.83	9.10	10.45	12.27	9.66	9.47	10.15	10.54	10.24
June	9.93	10.38	9.37	10.28	10.50	10.06	10.48	10.47	10.80	10.25
July	12.60	13.14	11.51	13.71	11.44	12.30	13.05	12.84	12.45	12.56
August	14.19	14.44	13.80	14.02	12.07	13.48	13.85	13.39	14.50	13.75
September	13.56	12.39	14.01	12.17	10.65	11.59	13.64	12.97	13.39	12.70
October	10.36	9.77	10.53	9.85	10.76	10.42	10.82	10.55	9.78	10.31
November	5.49	6.82	7.32	5.23	5.88	5.88	5.08	5.25	5.56	5.83
December	4.30	5.99	6.63	4.75	4.75	5.11	4.40	4.58	4.31	4.98

Source: Ministry of Tourism, Ankara, Turkey.

Table D98: Share of Tourism Receipts in GNP, Export Earnings, Mediterranean and World Tourism

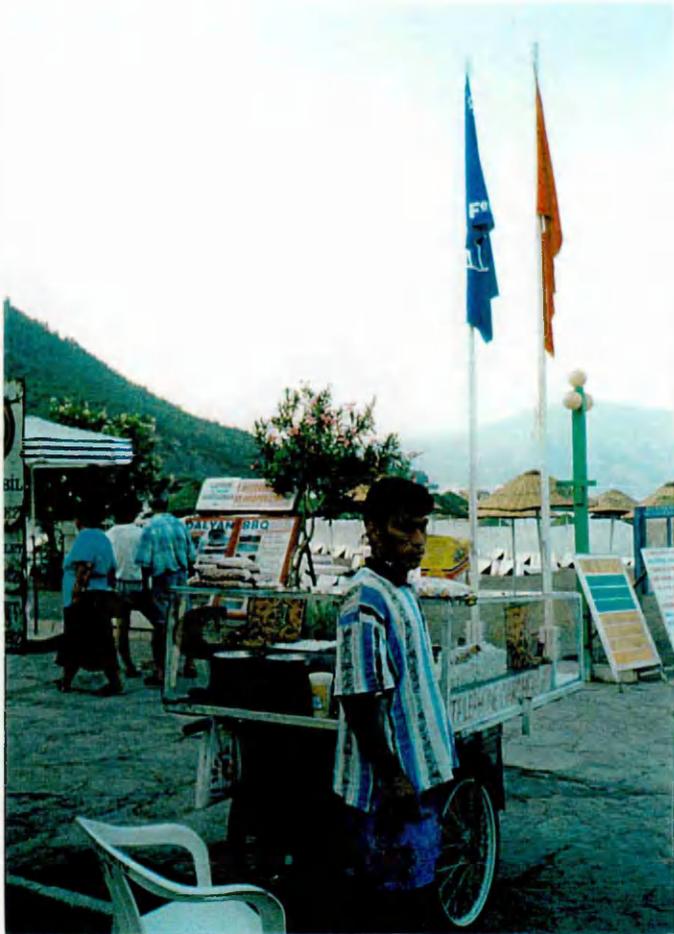
Years	In Mallorca (000 US\$)	Share in GNP (%)	Share in Ex- port Earnings (\$)	Share in Mediter- ranean (%)	Share in World Tourism (%)
1990	3,883,037	N/A	N/A	5.21	1.44
1991	4,001,354	N/A	N/A	5.59	1.44
1992	4,258,685	31.02	N/A	4.93	1.35
1993	3,970,256	35.38	N/A	4.64	1.23
1994	4,693,845	33.83	91.37	5.03	1.33
1995	5,478,627	34.93	87.66	5.15	1.36
1996	5,575,130	33.94	85.58	4.98	1.28

Source: Calculated data provided by the Ministry of Tourism, Palma de Mallorca; and International Financial Statistics Yearbook 1998, International Monetary Fund, Washington, USA..

Table D99: Share of Tourism Receipts in GNP, Export Earnings, Mediterranean and World Tourism

Years	In Turkey (000 US\$)	Share in GNP (%)	Share in Export Earnings (\$)	Share in Mediter- ranean (%)	Share in World Tourism (%)
1965	13,758	0.2	3.0	N/A	0.11
1970	51,597	0.5	8.8	N/A	0.28
1975	200,861	0.5	14.3	N/A	0.49
1980	327,000	0.6	11.2	1.08	0.31
1985	1,482,000	2.8	18.6	4.57	1.27
1986	1,215,000	2.1	16.3	3.07	0.86
1987	1,721,000	2.0	16.9	3.42	0.99
1988	2,355,000	2.6	20.2	4.15	1.18
1989	2,557,000	2.3	22.0	4.40	1.19
1990	3,225,000	2.1	24.9	4.30	1.25
1991	2,654,000	1.8	19.5	3.65	1.01
1992	3,639,000	2.4	24.7	4.19	1.22
1993	3,959,000	2.2	25.8	4.88	1.22
1994	4,321,000	3.3	23.9	4.77	1.26
1995	4,957,000	3.0	22.9	4.66	1.30
1996	5,962,000	3.2	25.8	5.32	1.37
1997	8,088,500	4.2	30.8	7.09	1.82

Source: World Tourism Organisation, Madrid, Spain.



Photograph 1: A person running mobile business on the beach in Turkey



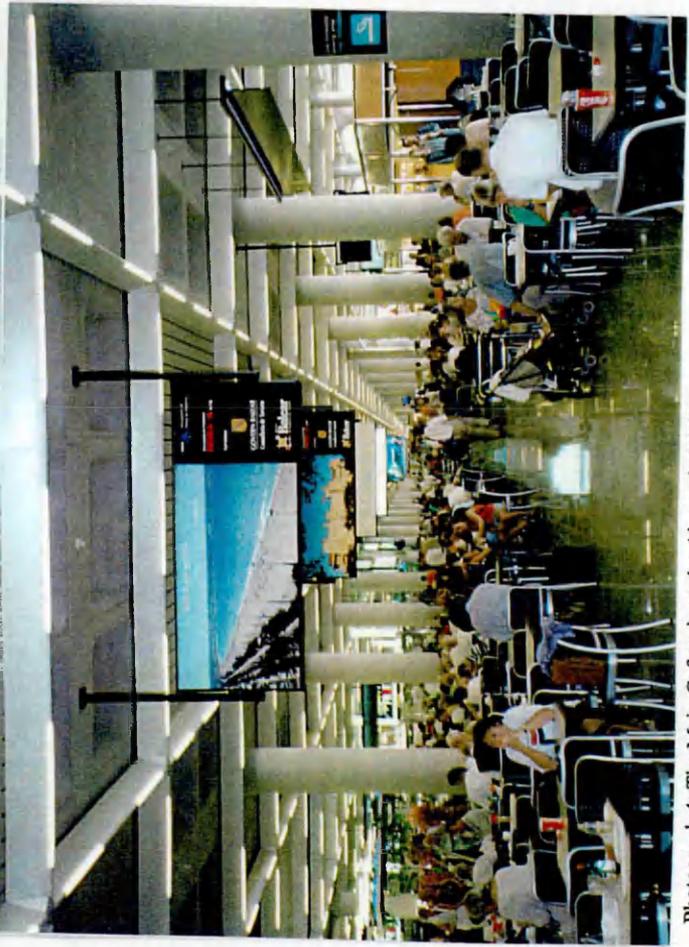
Photograph 2: A note in front of a restaurant indicating that there is no hassle (Turkey).



Photograph 3: A Departure Gate in Mallorca



Photograph 6: An Example of Dish pictured on the Menu with its Price (Mallorca)



Photograph 4: The Main Cafeteria at the Airport in Mallorca

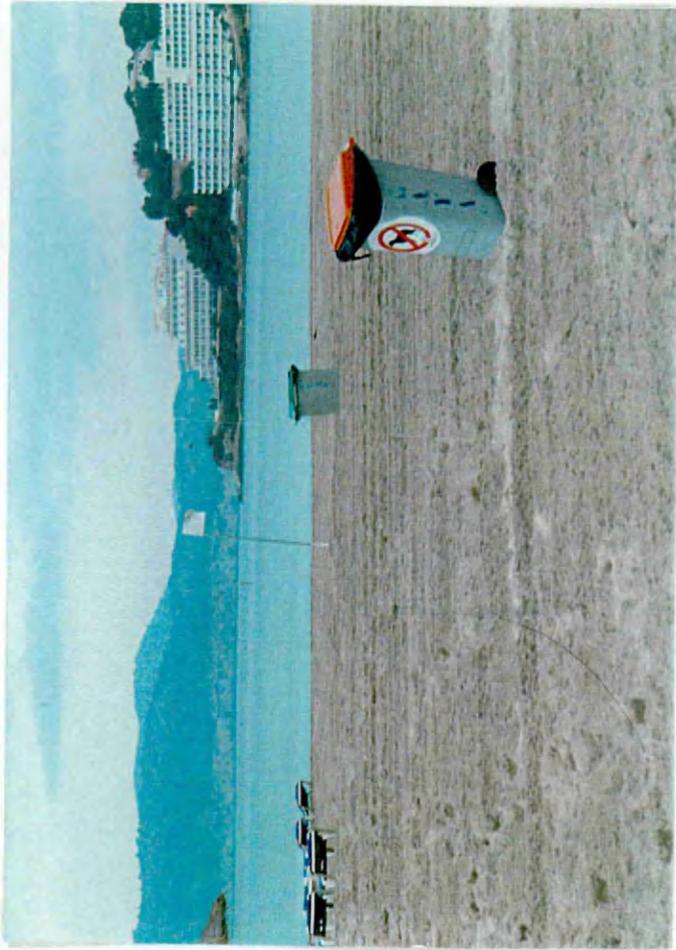




Photograph 7: A Menu in English (Turkey)



Photograph 8: Daily Boat Tours in Marmaris (Turkey)



Photograph 10: Large Litter Bins on the Beach (Mallorca)



Photograph 11: A small Litter Bin on the Beach (Turkey)



Photograph 13: A Hand-Made Signpost on the Beach (Turkey)



Photograph 14: A Fish and Chips Shop in Alcudia (Mallorca)

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