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Satisfying service needs without compromising culture

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## Satisfying service needs without compromising culture

### Introduction

Globally tourism operators and destination management organisations are eager to capitalise on the opportunities arising from the opening of new markets such as China and India. To enhance growth, market familiarisation is essential as shifting and evolving destination market shares impact expenditure, export earnings, GDP and employment (Dwyer and Spurr, 2011). It is also critical that those providing tourism services know, and value, what it is they offer and consider the distinctiveness of the Australian experience. Increased tourist visitation provides positive socio-economic opportunities associated with employment and increased revenues. Research suggests tourism was likely to have a positive impact on community cultural identity (Sharma and Dyer, 2012). However, leakage, over-development, xenophobia and artificial reconstruction of culture can result from poorly planned and ill-considered approaches to rapid increases in tourism (Besculides, et al., 2002) and cultural commodification (George and Reid, 2005). In consideration of these challenges, this paper focuses on regional tourism preparedness, asking: *how prepared are regional destinations for new and developing markets in terms of service provision and host destination cultural consideration?*

### Literature Review

There are few clear definitions for the term: emerging markets. Emerging markets are predominantly viewed fiscally according to level of income, GDP, growth rates or stage of development (as described by the World Bank, OECD, IMF and Sheth, 2011). This paper recognises new and developing markets (NDM) as newer, less developed markets in terms of tourist visitation numbers for a specific destination featuring developing and emergent market demand (Tourism Ireland, 2014). NDM trends must be recognised and prepared for, with early adopters supplementing or replacing existing markets (Tretheway and Mak, 2006). Economic and social reforms have opened NDMs (e.g. Russia, India, China) resulting in demand for not only existing but new tourism products and services (Pillania, 2009; Sheth, 2011). New market demand can result in opportunities for new infrastructure, attractions and even innovation in production, preparation and/or presentation of local culture, goods and services. Globally, tourism organisations are directing marketing efforts at outbound visitation from NDM, particularly China. China, the largest outbound market since 2012,

experienced exceptional growth (28% in 2015) for a total expenditure of approximately US\$165 billion and visitation at approximately 109 million in 2014 (UNWTO, 2014; 2015).

In 2013, overall tourism generated AU\$42 billion to the Australian economy, directly employed over half a million people and, as 46% of every tourist dollar was spent in regional areas, the benefits are wide spread (DFAT, 2014). Traditional Australian tourism arrivals are expected to increase with US arrivals growing by 6.9%, Germany, 2% and Japan, 1.3% over the next eight years (to 2022-23) (Tourism Research Australia, 2013a). In contrast, visitation from China is expected to grow by 23.7% with a potential value of AU\$7.4 billion with expected growth to 9.0 billion by 2020 (Tourism Australia, 2014a). Chinese visitors (2013-2014) spent AU\$5.25 billion in Australia, an increase of 16.3% 2012-2013 (Australian Trade Commission, 2015). Chinese tourist visitation began in 1999, when Australia became one of the first western countries, along with New Zealand, to be granted Approved Destination Status (ADS) which allows Chinese tourists to travel to Australia in guided groups (Australian Trade Commission, 2015; Commonwealth of Australia, 2015). Tourism Australia believes that to increase Chinese visitor revenues, operators should do more to cater to the specific needs of this market (Tourism Australia, 2012a). Operators should consider the Chinese visitors' desire for respect, cultural understanding, high levels of enthusiasm, positive attitudes and Mandarin-speaking staff (Tourism Research Australia, 2013). Industry clearly understand the need for what is called market familiarisation). For a destination to gain potential advantages, market familiarisation is essential. Furthermore, it is critical that there is a clear understanding and recognition of what is important to individual businesses and host destinations.

During the 1980s/1990s in Australia, Japanese visitation surged resulting in extensive, visitor oriented products, services and signage, but with negative impacts in some popular destinations (e.g. Gold Coast and Cairns, Australia) (Breakey, et al., 2008). Similarly, Japanese visitation in Cairns, the single biggest market at that time, had a powerful influence on product developed (Australian Government, 2011b). The products and experiences so successfully developed for the older Japanese market, were not suitable to other, newer markets, inhibiting the growth and development of NDM to replace the declining Japanese market (Australian Government, 2011b). When destinations contrive to meet perceived tourist needs, a loss of authenticity (Henderson, 2000, p. 215), soul and spirit (Holcomb, 1999) can result, repelling both targeted and existing markets. Extensive rebranding was required by

the Gold Coast to reinvigorate visitation and fill the gap following the decline of Japanese visitors (Pike, 2004) which halved (>700,000 in 2000 - approximately 350,000 in 2014) (Tourism Australia, 2014b) and this decline appears to be accelerating with Japanese visitors down 26% from 2013 to 2014 (Gold Coast Tourism Corporation Ltd, 2014).

There is a considerable amount of research associated with the broad topic of destination management. Smith (1994) contends tourism is a complex combination of elements including physical (built and natural features) and the service provisions within the various offerings from hospitality to the interactions between stakeholders in the provision of experiences. Tourist destinations must navigate within an increasingly competitive world. Differentiation of products and services is essential and this has been examined extensively within destination management literature (a few examples: Marrocu and Paci, 2013; Dwyer, Edwards, Mistilis, Roman, and Scott, 2009; Dwyer, Forsyth and Rao, 2000; Ritchie and Crouch, 2000). It is recognised that to gain a competitive advantage regions the tourist experience needs to be valued as greater than competing destinations (Dwyer, Livaic, Edwards and Kim, 2004). This paper focuses on service delivery and cultural consideration within the broader context of destination management.

### *Service provision*

Parasuraman, Zeithaml, and Berry (1988) suggest service quality lies between the customer expectations of the impending service provision and the perceptions of the service once received. Successful internationalization of service requires attention to the critical elements for achieving quality (Master and Prideaux, 2000) as tourism and hospitality businesses must provide a high level of service quality (Su, Swanson and Chen, 2016). Tourism accounts for 6% of the world's exports in services and is the fourth largest export sector (UNWTO, 2010) making service interactions critical to the tourism experience (Brunner-Sperdin and Peters, 2009). The Australian economy is reliant on the services sector which accounts for approximately 70% of GDP and 75% of employment (CIA, 2015). Service based economies involve the explicit knowledge and skills that contribute to achieving a competitive advantage and are the fundamental unit of exchange (Vargo and Lusch, 2004).

Effective service provision to international tourists includes availability of signage, interpreters and tour guides with appropriate language competences, as well as the mobility, previous experiences, motives, food, religious orientations, preferences and expectations,

rules of engagement and communications (Ballantyne, et al., 2011; Falk and Dierking, 2000; Packer, et al., 2014; Reisinger, 2009; Tretheway and Mak, 2006; Tsang and Ap, 2007). Research informing the development, design and provision of service is extensive and concentrated towards the consumer perspective (e.g. Gustafsson and Johnson, 2003; Zehrer, 2009).

‘Know thy market’ is the much repeated mantra throughout the tourism industry worldwide. Traditionally operators focus on one or two key markets and these have been European or American. However, with the emergence of markets from the greater China region (including Hong Kong and Macau), India and Russia, responding to the diverse service needs of disparate travellers is an increasing challenge. Understanding service provision that reflect the hosts’ culture and enhance visitor experiences for current and NDM has received less attention.

#### *Cultural consideration*

Globally, there are ever more diverse, evolving and new markets with equally wide-ranging, culture-based service offerings. Cultural differences in cross-cultural and multi-cultural service interactions create positive and negative outcomes (Sizoo, et al., 2005).

An important part of understanding the service requirements of travellers and tourists is to understand not only their culture but also your own. Culture refers to ‘that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society’ (Tylor, 1871 in Csapó, 2012, p. 201). Culture also refers to the ‘collective programming of the mind that distinguishes the members of one group or category of people from another’ (Hofstede, 2001, p. 9). Anthropocentric viewpoints suggest that culture includes ideas, thoughts, beliefs and values, symbolically expressed and communicated (Kroeber and Kluckhohn, 1952). Sofield (1991) suggests cultural identity is based on or traditions, lifestyle, values and protocol. How these relate to the region and how they relate to the product offering may aid in enhancing the visitor experience and maintaining cultural identity.

Early tourism was based on a sense of ‘cultural superiority on the part of the tourist’ and the evocative images of exotic destinations (Chambers, 2009, p. 354) focusing on the demonstration of tourist/host differences (Chambers, 2009). These experiences are evolving

from the authentic to respecting the broader and juxtaposed significances of culture by a wide variety of associated stakeholders (Chambers, 2009). Tourism and hospitality involve exchanges and interactions between the tourist and the operators or service providers which can be influenced or affected by individual cultural values (Lovelock, 1999). Within these interactions, culture is directly and/or indirectly shared, constructed and represented overtly or symbolically (Linnekin, 1997) as part of the tourist experience.

Extensive research exists that aids in understanding the cultural tourism. Research to date focuses on the representation, authenticity or preservation of culture whether religious, ethnicity, heritage or tradition based (for example, McIntosh, Hinch and Ingram, 2002; Chhabra, Healy and Sills, 2003; Theodossopoulos, 2010; Calver and Page, 2013). There is limited research exploring the need to consider the host businesses culture as part of the visitor experience.

#### *Geographic context of this study*

To gain advantages and minimise less desirable impacts, preparedness to cater to existing and NDM is crucial. This is explored within regional Australia. In terms of culture, Australians are described as egalitarian with a collective ideology, believe in equality, value 'mateship', sport loving and resolute (Cousins, 2005). Generally speaking, Australians are less respectful of ostentatiousness and individually-focused accomplishments while celebrating those who stand up against authority. The Australian culture is as diverse as the landscape (Australian Government, 2011a).

The Sunshine Coast is approximately 100 kilometres north of Queensland's capital, Brisbane, covers approximately 2,291 square kilometres featuring 52.3 kilometres of open coastline, 10 National Parks and two UNESCO accredited biospheres (Sunshine Coast Council, 2015; TEQ, 2014). The 317,000 residents encompass mid-life families and couples (60%) and retirees (28%) (TEQ, 2014). Tourism is a major economic activity and lifestyle driver, contributes almost AU\$2.7 billion of direct expenditure, approximately 35,200 jobs and a variety of infrastructure (for example restaurants, accommodation, transport and retail) (TEQ, 2014). Almost half (47%) of those residing on the Sunshine Coast want more tourist visitation in the region while 59% support tourism growth (TEQ, 2014).

Traditional Sunshine Coast tourist markets include New Zealand, United Kingdom, the United States of America and Germany. Australian regional tourism organisations have been directing marketing efforts at the outbound Chinese market. The Sunshine Coast regional tourism organisation (Sunshine Coast Destination Limited/SCDL) ‘identified China as an emerging market’ for the region (SCDL, 2014). According to Tourism and Events Queensland, (TEQ, 2013), the Sunshine Coast is one of Australia’s fastest growing regions, attracting almost three million domestic and international overnight visitors (June 2013). In 2014, the Sunshine Coast experienced the highest annual growth in international visitors (9.4%) of any Queensland region valued at more than AU\$2.5 billion in direct visitor expenditure (Sunshine Coast Council, 2015).

### **Methodology**

Approaches to interviews in research vary. Interviews can be conversational in which exchange occurs between researcher and research participant, allowing the researcher to insert their personality and prejudices into the interview (Oakley, 1981). Another approach is for the interviewer to listen and encourage interviewees to respond but not to intentionally engage in debate or offer personal insights (Veal, 2005). In the building of trust and rapport between these two parties, it is important that uninhibited conversation takes place. In this research, the interviewer was careful not to influence the responses by discussing personal opinions or dominating the conversation (Jennings, 2010).

In-depth interviews took approximately 30 to 60 minutes. In-depth face-to-face and telephone interviews, using qualitative and quantitative questions within a semi-structured questionnaire, were employed. Connecting quantitative questions (using a 5 point scale) with open-ended questions provided clarity and depth to the responses given. This approach permits the gathering of “rich empirical materials and thick descriptions” (Geertz, 1973 in Jennings, 2010, p. 173), support and validation of the results, important within an exploratory study with a small sample. It is recognised that in-depth interviews may mean the results are not easily extrapolated to the broader industry (Jennings, 2010). Nonetheless, our study is topical, and being exploratory will inform future research.

Interviews were conducted with tourism-related stakeholders within the greater Sunshine Coast region, Queensland, over a two month period in late 2013 including: local government,

managers/owner operators and industry organisations. The selection of sample participants is a form of purposive, non-probability sampling (Oliver, 2006 in Jupp, 2006). Industry stakeholders were selected based on their specialist industry and regional knowledge particularly pertaining to the research issue (Jennings, 2010; Oliver, 2006 in Jupp, 2006).

Questions explored the preparedness of the Sunshine Coast region to (i) NDM, (ii) current service quality provision and how this relates to NDM, (iii) characteristics of the Australian and host region culture and (iv) perceived value of preserving and presenting this culture to existing and NDM. Open ended and scale questions were used. Five point scales were used to seek responses to various statements. A mixed approach to questionnaire design featuring qualitative questions provides the opportunity to delve deeper into the relevance and meaning within responses (Burns, 2000). Descriptive statistics were employed to articulate/interpret the findings and to better understand the preparedness of this region/Australia to NDM with frequency, percentiles, ranges and standard deviations (SD) within univariate analysis provided (Jennings, 2010).

### **Findings**

Eighteen tourism-related stakeholders located in the case study region were invited and completed in-depth interviews. The average number of years participants had worked in the tourism industry was 20.6 years with an average 6.5 years in their current positions.

Open-ended responses revealed that at the core of the approaches participants employed in the products/services offered to NDM was the desire to present an Australian experience and one that reflects the region. Participants describe the Australian culture and Australians as friendly, open, honest, welcoming, accepting, happy, passionate, laid back; less demanding, hardworking, a 'she'll be right mate' attitude, relaxed, easy going. Although presenting local and national culture to tourists may be attractive and may preserve it this may also dilute, even destroy it (Besculides, et al., 2002). Participants were in agreement (av. 3.94; stdev 0.94) with the statement: *services should reflect the Australian culture rather than that of NDM market/s*. This was reinforced with comments that suggested this was an *imperative* driven from a desire to *keep what makes the region unique, not to end up like other mass tourism destinations, or compromise our lifestyle* and as *people want to come here to see Australia, not a version of their own culture we need to present ourselves as we are*. The need to consider the Australian culture in service design and delivery was considered slightly more



important with an av. 4.06 (stdev 0.56) compared to an av. 3.89 (stdev 0.76) related to designing and delivering services only preferred by NDM.

Several new and developing markets were identified by participants: China, South Korea, Singapore, Malaysia, Hong Kong and India. However, participants considered China as *only in the early stages* of development and growth for the region. Participants reiterated existing markets including the domestic, short-stay visitors from Brisbane and Melbourne, as well as New Zealand, United Kingdom, Canada and Germany which were considered to be re-emerging or reinvigorated markets.

The diversity between existing and NDM tourist markets presented challenges but also opportunities for regional operators. The need to gain accurate knowledge about each market, including visitor needs, languages, specific communication requirements and varying food preferences, all presented issues particularly for micro and small operators. Other external issues that impact preparedness and impede current abilities to address visitor needs, access and improve satisfaction included current regulations which were considered restrictive to the development of new products, limited regional infrastructure and public transportation which hinder access to and throughout the region.

Participants were asked to rate the regions and their own businesses preparedness regarding service provision to NDM. Responses varied (as indicated in larger standard deviations) but on average indicated the region and businesses were not well-prepared with 2.2 (stdev 1.2) and 2.3 (stdev 1.0) respectively. Resource availability influences preparedness and was reflected in the size of the businesses. For example, to address language issues larger businesses recruited Mandarin speaking staff while smaller enterprises were consulting language coaches, investigating interpretative technologies and/or relying on their own skills and knowledge.

When asked what constitutes excellent service in tourism, responses varied with most frequent recognising the need to *exceed expectations* (88%). Other comments revealed the concept/interpretation of excellent service was different in different contexts but involved creating memorable experiences and should be *simple, friendly, energetic, passionate, timely, efficient* and *personalised*. Excellent service was described as *service with a smile, warm but not overly familiar* and *proactive* rather than reactive. The availability of *well-trained staff*,

*the building of relationships, making an effort, listening and being present, being able to see the journey through the visitors' eyes, showing an interest, going the extra mile and having a good attention to detail* were all identified as facilitating excellent service.

Overall, the quality of tourism services provided within the region was rated as average (3.1 on a 5 pt scale). A key area for improvement focused on consistent staff education and training (93%). A few participants (11%) indicated a wide spread attitude that values customer service was needed with one participant reiterating that *people have a lifestyle business and expect customers to fit in with them*. Comments also suggested improving regional understanding of the different cultures, providing translatable information both digital and written, and marketing (e.g. cross-regional and cluster promotion) should all be considered. All 18 participants expressed the need to consider both the visitor and the host region when designing and delivering service but not at the expense of the host region.

In describing the service standards and specific service requirements expected by NDM, participants stated staff need to speak the visitors' language (45%), provide readable or understandable menus (e.g. features images of food items) (44%), offer high speed Wi-Fi (15%) and give small gifts (e.g. on the night stand or on arrival) (5%). Although participants said menus should feature different languages as applicable to the relevant target market/s it was considered by 80% (av. 2.7; stdev 1.2) that signage around the businesses and the region should not be in the visitors' language (excluding safety signage which should be multi-lingual).

The key identified challenge was communication. This was primarily due to the variety of languages and national dialects and diversity created by existing and NDM. When considering the Chinese market, participants recognised the inter-cultural diversity of eight major dialectic groups needing consideration: Putonghua (Mandarin), Yue (Cantonese), Wu (Shanghainese), Minbei (Fuzhou), Minnan (Taiwanese), Xiang, Gan and Hakka (Harper, et al., 2009). In exploring language provision, participant responses were mixed. Within verbal communication it was considered that English (the host regions language) be predominantly spoken but with recognition and at least basic understanding/usage of the visitors language. Participants disagree to strongly disagree that *tourism-related service providers should only speak English* (av. 2.06; stdev 1.0) and also disagree to strongly disagree that *all tourism-related service providers should speak the visitors' language* (av. 2.5; stdev 1.0).

Questions were asked to gain an understanding of current practices and future planning with regard to enhancing service delivery to NDM. A spectrum of responses, from not changing anything to the implementation of broad changes such as hiring of staff that represented the relevant NDM, were provided. Five participants (26%) were unsure of the services preferred by NDM. Three (2%) stated they would not be tailoring their services to the needs of emerging markets and determined that as *our product is unique and therefore we will not change much to meet emerging markets*. This was not expressed as disregard to the needs of NDM but to the diversity of the markets and desire for visitors to have an authentic experience.

Variety of NDM preferences relating to their own cultural heritages are evident. When examining just two NDM, the Chinese and Indian markets, these variances are evident and reiterate the challenges faced. Superstitions like Fengshui, lucky and unlucky numbers, and certain colours hold specific meaning to Chinese people (Tourism Research Australia, 2013a). In contrast, Indian visitors appreciate punctuality but may not be punctual themselves, expect a very high levels of service, and recognition of status as hierarchy and rank in life is paramount (Tourism Research Australia, 2013b). One participant said in recognition of Chinese cultural preferences they have incorporated the desired colours (in wrapping paper) and numbers (in pricing). Identifying similarities and recognising differences can assist to determine how to address gaps, but this was considered time consuming.

To date participants had sought information via online research (76%), attended seminars, workshops and other industry (SCDL and Chambers of Commerce) provided training (43%), used personal experiences (38%), listened to visitors (19%), attended networking events and reviewed visitor feedback and online reviews to increase their knowledge. One participant had undertaken a familiarisation tour within the ASEAN region while two were exploring innovations in the provision of local foods that respond to the presentation and taste preferences of NDM by combining *authentic local experiences using fresh, clean, local foods*.

Open ended responses reveal various planned activities for gaining an appreciation of NDM including investigation and possible development of translatable website content; personal and staff training in cultural consideration, menus, food preparation and service delivery; attending tourism organisation and government sponsored networking events, workshops and

seminars; recruitment of multi-lingual staff or co-operation with other businesses who offer multi-lingual interpretation to access interpretive technologies, co-operative marketing efforts and increased networking.

## **Conclusion**

Increases in emerging markets from the supply side (the destinations) are inevitable and will be a disruptive influence on travel patterns (Sheth, 2011). Conversely, rapidly increasing demand (NDM) will mandate differing approaches to achieving visitor satisfaction, and a destinations ability to market to, cope with and prepare for these diverse, somewhat unknown and rapidly evolving markets. Significant societal changes and growing international traveller numbers are influencing global tourist movements and increasing the cultural diversity of tourist markets (Wang, et al., 2008). We travel to see the different, taste the new, experience the unusual. Australian cultural society is being influenced by ever increasing and diversifying multi-cultural communities, changes to inbound and outbound tourism patterns and sources, increased tourism development and an increased awareness of, and participation in, global politics (Breakey, et al., 2008).

Operators must actively consider NDM desires for genuine respect, cultural understanding, high levels of enthusiasm, positive attitudes and the provision of multi-lingual staff (Tourism Research Australia, 2013a). Results indicate that those presenting services to NDM want the local culture to be recognised as valuable to the provision of unique experiences. Offering distinctive, differentiated services and memorable experiences are key factors in achieving success in an increasingly competitive marketplace (Tussyadiah, 2014).

Satisfying customer needs is critical thus regional tourism organisations, government and community must be well prepared. However, increasingly diverse markets exacerbate the development of realistic, implementable strategies (Wang, et al., 2008). Doctoroff (2005 in Chow and Murphy, 2011) reiterated the existence of fundamental social and cultural differences between China and Western societies. These should not be ignored with additional consideration such as the employment of Chinese speaking staff, multi-lingual signage, interpretive exhibits and food be considered (Juneck, et al., 2003).

Tourism is labour intensive with much of the employment being seasonal, part-time and casual, low skilled, non-contractual and often related to transient movements of potential staff (e.g. backpackers or studying students). Repetitious training cycles required to ensure reliable service delivery can result in inconsistent or even non-existent staff training. This further inhibits the ability to retain staff, provide quality service and respond to ever changing tourist needs.

Preparedness was inhibited as not all participants understood NDM service preferences and resource allocation may not be a high priority. Knowing the extent services need to be altered to meet NDM preferences influences resource allocation. Participants expressed a desire to attract and address the culturally oriented service requirements of NDM but not at the expense of the uniqueness of their current service offerings. Historically (such as the Gold Coast), altering products and services to cater to a narrow and specific market is unsustainable and limits growth, development and market diversification. The identification of market similarities and differences can assist tourism service providers to prepare and allocate resources. Comments reiterated that knowing who you are (as a business and a destination) and what existing resources can be employed to enrich the overall tourist experience may reduce cultural and resource challenges, while increasing financial opportunities.

Results highlighted innovative approaches involving food are creating authentic visitor experiences that cater to multiple markets and displays unique regional features. Food and culture are symbiotic attractions for tourists seeking the authenticity of a place and facilitate local economic development with over a third of tourist expenditure being devoted to food (OECD, 2012; Telfer and Wall, 2000; UNWTO, 2012). Alborn (2015 in Tourism New Zealand) stated in relation to New Zealand tourism's endeavour to attract Chinese visitors that operators should 'offer immersive experiences' and to 'work with the premise of *xin xian*' (defined as fresh, unusual, novel) (Collins Chinese Dictionary, 2004) which focuses on 'food ... in its natural state, caught at the source, and the visitor is involved in the process of sourcing, preparing and cooking it'. This reiterates the potential for regional areas to enhance the profile, production and consumption of regional foods. This region features numerous food related activities including large (e.g. Eumundi market) and small (e.g. local farmer's market) markets, food themed tourist destinations (e.g. Ginger Factory), festivals and events (e.g. Real Food Festival). Individual tour businesses are utilising local food to tell the regions

story to further craft memorable experiences. Capitalising on existing regional assets and developing cooperative networks can increase resources and preparedness to present services that reflect regional culture.

Rapidly increasing growth in international Chinese tourists has resulted in tour operators grappling with the question of the products adaptation requirements for this clientele (Mondou and Taunay, 2011). Despite tourism organisations directing marketing to NDM, regional areas and their inhabitants may not be prepared to receive them. If tourism operators are ill-prepared, levels of tourist satisfaction may reduce re-visitation and positive word of mouth, negatively impacting future visitation. To assist tourism providers to prepare, identifying both similarities and differences can direct resource allocation. Fashion, fad and visitor lifecycles can influence tourist visitation, motivation and preferences over time (Hsu and Lam, 2003; Huang and Hsu, 2005). Similarly, destinations pass through lifecycle phases that can influence the type, number and frequency of visitation (Butler, 2006). These factors can further exacerbate a destinations ability to prepare and address changing visitor preferences and characteristics.

Tourism can support economic development, income and employment for regional areas (Liu, 2006). In developing tourism it is important to undertake a collective assessment of the regions distinctive characteristics and assets both natural and cultural to enhance visitor experiences and community image (Howe, et al., 1997). Visitors are attracted by authentic natural and cultural resources (Briedenhann and Wickens, 2004) and once recognised can generate innovative approaches for addressing increasingly diverse markets. Consideration should be given to service standards and regional culture when adapting and developing product and service.

Although limited by the small sample size, this paper provides the implications for tourism management in relation to regional industry preparedness for NDM. Findings aid understanding and can identify gaps to be addressed to capture and enhance visitation. It was ascertained that consideration be given to service standards and cultural consideration in adapting and developing product and service offerings. To achieve this, and address sustainable development consideration for mitigating negative impacts to host communities, the visions and values of the destination must be considered (UNEP, 2015). Due to varying

stakeholder objectives and agendas, socio-cultural impacts can create both positive and negative outcomes (UNEP, 2015).

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