

## **Measuring Customer Satisfaction In The Tourism Industry**

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### **ABSTRACT**

*This paper seeks to outline the way in which customer satisfaction has been measured in the Australian tourism industry and the means by which this could be developed further to provide a measure of satisfaction with Australia as a destination.*

*The tourism industry is made up of a number of different sectors including the travel, hospitality and visitor services sector. Within each of these sectors there are a number of individual enterprises that have attempted to measure customer satisfaction as part of their quality assurance programs. This has become more common as the industry recognises the importance of quality issues in an increasingly competitive environment. It has also been stimulated by the move towards an industry-driven accreditation system.*

*This paper outlines some examples of the ways in which these measures have been undertaken at the enterprise level and the accreditation framework within which these are often established. It also proposes the idea that it may be useful to extend satisfaction measurement from a focus on the enterprise to that of the destination. This is a much more complex task than at the individual enterprise level but may be worth the effort as destinations compete for market share.*

**Keywords :**      Satisfaction measurement, tourism, destinations

### **1. Introduction**

This paper seeks to explore the rationale for, and difficulties of operationalising, the measurement of tourists' satisfaction with their experiences in particular destinations. It suggests that the on-going systematic measurement of satisfaction with destinations is a valuable exercise that will have tangible benefits, but acknowledges the difficulties of doing this in a meaningful manner. The principal argument presented is that the measurement of tourists' satisfaction with a particular destination involves more than simply measuring the level of satisfaction with the services delivered by individual enterprises. There needs to be a much broader, more encompassing means of measuring satisfaction, one that relates closely to the motivations which tourists have for visiting the destination in the first place.

The tourism industry consists of a number of different sectors including the travel, hospitality and visitor services sector. Within each of these sectors there are a number of individual enterprises that provide a range of services to people who are travelling away from their home environment. This travel could be for a variety of reasons including for pleasure, to visit friends and relatives, to work on a short term basis, to attend conferences, to participate in business activities, or any of a number of specific reasons. While the industry distinguishes between the various groups according to their purpose for travel, convention has it that all these short-term travellers are defined as 'tourists'<sup>1</sup> (Australian Bureau of Statistics, 1997). Likewise, the industry distinguishes between various 'markets' according to their place of origin (international, domestic, intra-state, interstate, etc). These distinctions are not relevant to this paper which is concerned with all these forms of tourism.

Tourists visit destinations and engage in various activities while there. These destinations can be classified in various ways and at various scales of analysis. For example, Australia could be regarded as a destination for international visitors while Victoria could be one for people from Western Australia. At a different scale, a city or even a region could be regarded as a destination. This paper is concerned with all

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<sup>1</sup> The accepted definition of a tourist is "any person travelling to a place other than that of his/her usual environment for less than twelve months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited" (Statistics 1997)

these levels. It is not concerned with individual enterprises which exist within certain destinations. As noted below, there appears to be adequate analysis of tourism satisfaction at the individual enterprise level. What is missing is a broader view that looks at the way tourists respond to the totality of their experiences in a particular destination irrespective of the particular activities that they engage in.

## **2. Tourism in the Australian economy**

Over the last two decades the tourism industry has emerged as a significant sector of the Australian economy generating approximately \$50 billion in income, employing 1 in 9 Australians and contributing about \$15 billion in export earnings.

While approximately 70% of tourism activity involves domestic travel, the fastest growing sector is in-bound travel. This has been increasing significantly over the last two decades with Australia receiving 3.3m visits in 1998. Despite the recent downturn in the economies of major source countries, visitor arrivals to Australia are expected to grow at an average annual rate of between 0.6 and 4.7 per cent to reach between 4.4 and 5.2 million visitors in 2001.

Being a relatively new industry characterised by growth, the focus has been on marketing, visitor numbers, length of stay, expenditure patterns and other measures of consumption. As the industry has begun to mature in the last five or so years, there has been an increasing interest in such things as quality of service, accreditation procedures, and measurement of client satisfaction. The issues discussed in this paper should be seen as part of this maturation process in which the industry is looking to achieve long-term sustainable growth that generates benefits for the industry, the clients and the community as a whole.

## **3. Current Measurement of Tourist's Satisfaction Levels**

Despite the large body of literature available on satisfaction research in general, only a few academic studies have focused directly on customer satisfaction amongst tourists. Of these, an even more limited number have been undertaken in Australia. The major studies include Fick and Ritchie (1991), Reisinger and Waryszak (1994), Arnould and Price (1993), Crompton and Love (1995), Geva and Goldman (1991), Maddox (1985) and Ryan (1995). Because of the limited material available in the academic literature, a telephone survey of organisations that may have investigated tourist satisfaction was undertaken.

Given the broad focus of the paper, no attempt was made to look at individual tourism enterprises measuring the satisfaction level of clients as part of their on-going quality assurance program. The most common example of this is the questionnaire that is left in individual hotel rooms. These vary from single response questions to sophisticated instruments designed to elicit quite detailed responses from guests. Most of these are diagnostic in the sense that they are aimed at identifying specific measures that can be taken to improve the service. Some specifically enquire about customer's perceptions of the service's value for money. In some instances, particularly amongst 5 star hotel chains, these are used for benchmarking or as performance indicators.

Because of this decision to exclude individual enterprises, the survey focussed on the following organisations:

- academic departments of Australian universities
- State and Commonwealth tourist offices
- State and Commonwealth parks agencies
- Non-government tourist industry organisations and associations

The search found a range of studies have been completed most of which are primarily data-gathering research exercises rather than conceptual studies. The prime studies are as follows :

- *Bureau of Tourism Research*

The Bureau of Tourism research has looked at this topic at various stages over the last decade and, in some years, included questions about satisfaction in its International Visitor Survey (IVS). In 1990, respondents were asked what they 'enjoyed most' and 'disliked most' about each state. This question was not repeated in later years. In 1994 and 1995 respondents were asked to provide information about their satisfaction with certain services such as the availability of foreign language signs, interpreters, facilities for the handicapped and road and street signs. This was discontinued in subsequent collections.

The Domestic Tourism Monitor (DTM), an omnibus survey of approximately 60,000 domestic travellers, did not include questions about satisfaction. Its replacement, the National Visitor Survey (NVS) which has been introduced in 1998, likewise does not include any questions of this type.

- *Commonwealth Tourism Agencies*

The Australian Tourism Commission has completed a number of satisfaction studies for various source countries such as Malaysia, Japan, Korea, United Kingdom, etc. Visitors are interviewed at their point of departure to determine what their impressions are of Australia as a holiday destination. They seek responses on what their expectations were before arrival, whether these were met, and whether they would return or recommend Australia as a tourist destination. The survey goes into considerable detail about respondents' satisfaction with elements of their trip such as standards of hotels, service standards in restaurants, on domestic airlines, etc, shopping opportunities, friendliness of the Australian people, and so on. It is a comprehensive survey that provides valuable information that can be used by individual sectors of the industry to assess, in general terms, their performance. Unfortunately, each source country is not surveyed regularly so there is no continuity of data. Indeed, most countries have been surveyed only once.

The National Office of Tourism has also commissioned a specific research study into visitor satisfaction amongst ecotourist (Yann, Hore, Campbell, Wheeler, 1996). This was a small scale study conducted between November 1995 and February 1996 designed, *inter alia*, to identify the factors that influence satisfaction levels amongst individuals participating in ecotours. The study involved a number of focus groups amongst participants on tours and potential ecotourists in all states of Australia. On the basis of motivating factors it identified a number of different groups of ecotourists and established the 'key drivers' that lead to satisfaction.

- *State Tourism Offices*

Only a few state tourism offices have undertaken research into customer satisfaction or related issues. Most declare interest in the question but have concentrated primarily on market research and/or descriptive surveys (what visitors do, where they go, how much they spend, etc).

Tourism Western Australia have completed a study of what their own clients think of the service they received. This is akin to enterprise-level customer feedback surveys.

The Northern Territory Tourism Commission has completed a survey of customer satisfaction amongst users of caravan parks (Northern Territory Tourist Commission, 1994). This was undertaken in response to media criticism of the quality of caravan parks in the Territory. Approximately 900 people were surveyed and the focus was on the users' opinions about a range of facilities (eg. toilets, play equipment) and the services received (eg. check in procedures). In the light of the media criticisms, the Commission described the results as 'pleasing' as they demonstrated a favourable view of most caravan parks. There were, of course, specific criticisms of certain aspects of individual parks. What is most interesting, however, is the fact that the respondents demonstrated how much their experiences in these parks affected the satisfaction of their overall trip.

Tourism Victoria's 1995 Regional Travel and Tourism Study (Tourism Victoria, 1996) collected some limited information on satisfaction levels. The survey was conducted in both households and commercial establishments and gathered information on both overnight and day trips in regional Victoria in 1995. Respondents were asked to indicate how satisfied they were with their trip overall as well as their satisfaction with particular aspects of their trip. The latter included restaurants/cafes, attractions, shopping, commercial tours and availability of tourist information.

- *Park Agencies*

Park agencies around Australia have been amongst the leaders in looking at the question of satisfaction amongst its clients.

Melbourne Parks and Waterways (now part of the newly created Parks Victoria) had undertaken regular visitor satisfaction surveys for a number of years. These focussed on 17 domain-specific items relating to an urban park visit, including visitor amenities such as toilets, children's playgrounds, etc.

Parks Victoria (the replacement for the Victorian National Parks Service and Melbourne Parks and Waterways) has undertaken extensive research in this area (Byrne, 1995). In 1996 it commissioned a study to determine the most appropriate method for monitoring visitor satisfaction on an on-going

basis (Roger James & Associates, 1996). Building on this work there has been on-going monitoring of visitor satisfaction levels at most parks since 1997.

The Department of Conservation and Land Management, the agency responsible for park management in Western Australia, has also undertaken regular surveys which include the measurement of visitor satisfaction. Again this focuses on questions of facility provision but does attempt to address the more nebulous aspects of satisfaction such as the natural attractiveness of the park, its remoteness, etc.

It is clear that some work has been done in this area by a smattering of agencies each of which approaches it from a quite different perspective. Despite acknowledgement of the potential value of the data, current efforts are not co-ordinated resulting in a lack of comparability that makes it impossible to identify trends and monitor changes in a systematic fashion.

More importantly, the diversity of approaches demonstrates a need for substantial conceptual work on the nature of tourist satisfaction in general and the measurement of tourist satisfaction with destinations in particular. What is required is further exploration into the application of concepts and ideas drawn from the broader consumer literature to the specific challenge of measuring the satisfaction of tourists with particular destinations. This may require a quite different approach to that adopted for other services.

#### **4. Why measure satisfaction at the level of the destination?**

There are a number of reasons why it would be appropriate to look at extending the measurement of tourist satisfaction to the more global level of the tourist destination. Without pre-empting the nature of this measurement, these reasons include :

- Millions of dollars are spent each year on destination marketing by national and state tourism offices, airlines and regional tourism bodies. This includes detailed surveys of potential markets as well as extensive advertising and promotional campaigns in source countries. While there is considerable research into the impact of the promotional effort through awareness studies, tracking studies, etc, these all concentrate on the inputs (ie. has the campaign reached its target audience?). What is missing is an understanding of the client's reaction to the product offering, in particularly whether it meets the needs of the target market. This would become an integral part of the understanding what the market(s) is/are seeking.
- Peak organisations in the tourism industry recognise the need to encourage both new and repeat business. The latter can best be achieved by ensuring that our current offerings are satisfying the needs, expectations and desires of current tourists and their propensity to recommend the destination to others.
- The measure could become a barometer of the 'health' of the industry for strategic planning purposes.
- The tourism industry itself is grappling with the issue of service quality and recognises that this is the key to long term success. At present its focus is on establishing accreditation mechanisms to ensure that individual firms conform to appropriate standards. Monitoring tourists' satisfaction at the more global level would provide a valuable framework for this and enable comparison between the efforts of the individual enterprise and those of the industry as a whole.
- Government agencies are now recognising the value of assessing the success of their programs in terms of outcomes rather than inputs<sup>2</sup>. As Australian government agencies move in this direction the need for the systematic collection of the type of data proposed will increase. In the case of tourism, this is particularly relevant to national, state and regional tourism development bodies responsible for destination marketing. Using the level of satisfaction experienced by visitors to their destination as a

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<sup>2</sup> For example, in the USA the federal government enacted the Government Performance and Results Act (GPRA), 1993 requiring all government agencies to set goals and to report progress towards meeting those goals. This makes agencies responsible for their results rather than their efforts. Agencies like the US National Park Service have responded by establishing a management system capable of demonstrating the outcomes produced in terms of both quality of resources and visitor experiences. The latter is accomplished through a Visitor Services Project which surveys national park visitors to determine their needs, opinions, and level of satisfaction. This so-called 'report card' on how well the Park Service is doing has been completed on an annual basis for five years. This provides an opportunity to monitor visitor trends and opinions over time.

measure of success would transfer the focus away from the efforts of the organisation towards their achievements.

- Governments of all persuasions are looking critically at their financial commitments and questioning whether they should continue the traditionally high level of support. If the industry can demonstrate a relationship between the level of support and the satisfaction of visitors to their destination then the argument for continued support would be strengthened greatly. This would complement other measures such as visitor numbers, expenditure, etc.
- With an appropriate measurement instrument it could be possible for individual sectors of the industry to be compared with other sectors. In an industry where the success of the whole depends on the contribution of each part, this information will help to identify those sectors that need to improve.
- Recent developments in consumer protection have extended into the area of satisfaction. The 1993 European Union Directive on Travel has required member states to implement laws giving tourists the right to obtain compensation from packaged tour operators in the event that they are 'dissatisfied' with their holiday. This applies in all destinations, including Australia. The results of the proposed survey will help to focus the attention of the industry on this issue and provide data on how the industry is going and what needs to be improved.

## **5. Perspectives on Measuring Tourists' Satisfaction with a Destination**

Measuring tourists' satisfaction with a destination is conceptually different from measuring satisfaction at the transaction specific level. Moreover, it is contended that while satisfaction at the destination level is influenced by the various transactions that occur at that destination, an individual's level of satisfaction is influenced by much broader, global factors, some of which are beyond the capacity of the tourism industry to affect. The purpose of this section is to outline some ideas that should be taken into account when developing a method to measure satisfaction at this relatively abstract level.

Johnson, Anderson *et al.*, (1995) have distinguished between two different general conceptualisations of satisfaction : transaction-specific satisfaction and cumulative satisfaction. The former is concerned with "satisfaction as an individual, transaction-specific measure or evaluation of a particular product or service experience" (Johnson, Anderson *et al.* 1995 : 699). Cumulative satisfaction, on the other hand, is "a cumulative, abstract construct that describes customer's total consumption experience with a product or service" (Johnson, Anderson *et al.*, 1995 : 699). As a customer's overall evaluation of the purchase or consumption experience, cumulative satisfaction is the most relevant conceptualisation when the focus is on the tourist's evaluation of their overall experience at a destination. This is sometimes referred to as market-level satisfaction.

The literature suggests that satisfaction measurement must be treated differently at these two levels of abstraction. Moreover, when considering consumer satisfaction with their consumption experiences, a major distinction has been made between the consumption of goods and services (Lovelock, 1991). Measures of satisfaction are not the same for these different consumption experiences, largely because of the role of the consumer in the service encounter. It could also be argued that tourism is a 'special' service in that, like recreation or education, it is largely self-produced (Williams, 1988). The individual plays a central role in determining the experiences achieved and the benefits derived.

The 'special' nature of tourism can be understood by adopting the behavioural perspective first developed within the recreation and leisure literature. This literature demonstrates the value of perceiving recreation as activity that creates experiences which, in turn, result in benefits for the individual (Driver and Tocher, 1970; Mannel and Iso-Ahola, 1987). This created a focus on the factors which determine the quality of those experiences and the benefits derived. Measurement of satisfaction has therefore involved an assessment of whether the experiences have resulted in the desired benefits sought by the individual. In his seminal paper (Wagar 1966) suggested that the quality of recreation experience depends upon how well desired outcomes are realised. Satisfaction is therefore more a function of the needs and interests of the individual than the attributes and characteristics of the service provided.

These ideas have gradually become the basis of the conceptualisation of the tourist experience and informed much of the work about tourist motivations and expectations (Crompton and Love, 1995; Ryan, 1995). Therefore tourist experiences can be regarded as the result of an active endeavour by the individual

to create a situation in which to achieve satisfaction. It is this active involvement of the individual in the creation of his or her personal experiences that needs to be acknowledged.

In a similar vein, the early recreation literature also recognised the implications of this approach for the assessment of recreation service quality. It was recognised that “the quality of the experiences can be influenced by input factors provided by managers . . . but to a considerable extent the quality of experiences depends upon choices made by recreationists and how they use the many factors of production” (Brown, 1988: 413). In other words, the satisfaction levels experienced by recreationists are recognised as being a function of a number of different variables including those brought by the recreationist him/herself which are beyond the influence of the service provider.

Drawing on the consumer literature, it is too easy to assume that the outcomes of the tourist activity are solely the creation of the tourist operators/industry. However, it is perhaps more enlightening to adopt a ‘transactional perspective’ outlined in the recreation literature. Here, the tourist “actively creates the recreation(tourist) experience, through a transaction with the physical and social setting, including what the recreationist (tourist) brings to the process in terms of history, perceptions, companions, skills, equipment, identities, hopes and dreams” (Williams, 1988 : 432). With this perspective, more emphasis is placed on the behaviour of the individual and their role in creating the experience. Not all the responsibility for creating high levels of satisfaction rests with the service deliverer.

With this in mind, (Crompton and Love, 1995) make a distinction between quality of opportunity and quality of experience.

“Quality of opportunity is defined as quality of the attributes of a service that are under the control of a supplier. Evaluation is concerned with judgements about the performance of the leisure opportunity supplier. . . . In contrast, quality of experience involves not only the attributes provided by a supplier, but also attributes brought to the opportunity by the visitor or recreationist . . . Quality of experience is a psychological outcome or emotional response . . . Satisfaction is measured by how well leisure activities are perceived to fulfill the basic needs and motives that stimulated the idea to participate in the activity (Crompton and Love, 1995 :12).

When the objective is to measure satisfaction with a holiday in a particular destination, it will be important to note this distinction and ensure that both aspects are included in the assessment. We have been reasonably good at assessing tourists’ perceptions of the quality of opportunity but largely ignored the question of quality of experience.

A further perspective that could be of relevance here is that of Herzberg (1966). While his work mainly focussed on the workplace, his theory of motivation has relevance to the expenditure of discretionary time such as going on a holiday. Herzberg (1966) suggests that all aspects of an experience can be classified as either a motivational or a hygienic factor. Motivational factors are those that positively encourage people to do something. For example, a desire to make new friends may motivate people to go on an organised tour rather than travel alone. On the other hand, hygienic factors are those things which would not encourage one to travel, but their absence would discourage such travel. A good example is the availability of clean drinking water. Having this available is unlikely to motivate someone to travel, while its absence could cause someone to not choose a particular destination. According to Roger James & Associates (1996) “the absence of motivational factors does not lead to ‘dissatisfaction’ but rather to ‘unsatisfaction’ a sense of emptiness rather than a sense of anger or disappointment. On the other hand, the absence of a hygienic factor will lead to dissatisfaction. The presence of such a factor will not lead to ‘satisfaction’ but rather to ‘satisficing’, that is, a passive (albeit benign) feeling” (Roger James & Associates, 1996 : 34).

If we adopt this framework it could be suggested that we have tended to focus on the hygienic factors which are represented by the measurement of how well the services (hotels, airports, travel companies, etc) are provided. These are important because without these being done well, the customer would be very dissatisfied. However, we have not also measured the motivational factors. These are akin to the experience factors - how well the destination facilitates the satisfaction of personal needs. The best way of ensuring that we are providing this is to understand the clients needs, etc and to develop product that is relevant to these. In turn, this is linked to the benefits to be derived from the experience thus creating satisfaction.

The work by Arnould and Price (1993) on white water rafting (described as an “extraordinary experience”) confirms the role that needs and desires play in the consumer’s evaluation of a particular experience. They present very clear evidence that the satisfaction of participants in this recreational (or

possibly tourist?) activity is related to the extent to which the experience enhances their individual cultural script and are “interpreted within the broader narrative context of the consumer’s life” (Arnould and Price, 1993 : 26). They suggest that “satisfaction with river rafting . . . does not seem to be embodied in attributes of the experience such as amounts of time spent freezing in wet clothes, uncomfortable toilet facilities, bad food or any summary index of specific attributes of the trip” (Arnould and Price, 1993 : 25).

These general thoughts appear to be in line with the fundamentals of the marketing concept most commonly described as “satisfying the needs and desires of the consumer” (Keith, 1960 :38) and the whole notion of benefit segmentation which suggests that purchases are selected on the basis of the benefits derived by consumers (Haley, 1968). It is also consistent with the recent work of Spreng and his associates which emphasises the role that desires, as opposed to expectations, plays in determining satisfaction within the disconfirmation framework (Spreng, MacKenzie *et al.*, 1996).

## 6. Where to from here?

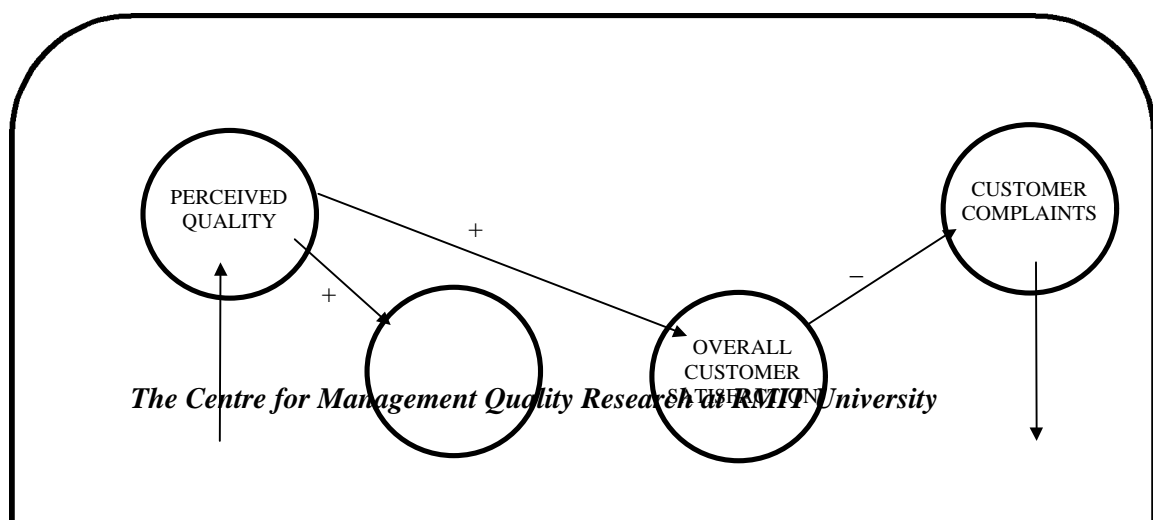
Space does not permit an exhaustive examination of the extensive literature outlining the various models used as the basis for measuring customer satisfaction (see Parasuraman, Zeithaml *et al.*, 1994; Rust and Oliver, 1994; Yi, 1991). However, a review of this literature has uncovered a model that could be developed to provide a satisfactory method of evaluating tourists’ satisfaction at the level of the destination. This model has been developed by Fornell and associates at the University of Michigan and has become the basis of extensive work at the national and international level.

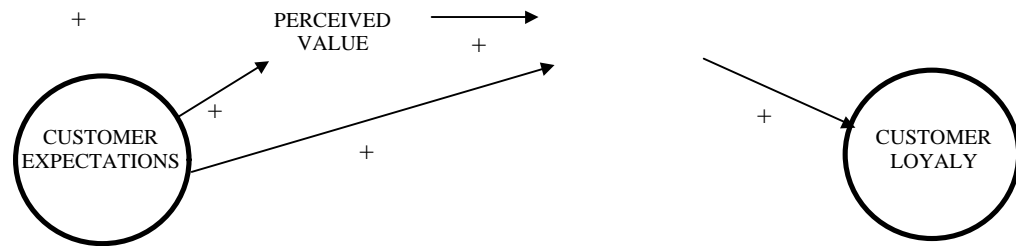
This group has developed a national index that is used to evaluate the performance of firms, industries, economic sectors and national economies on an on-going basis (Fornell, Johnson *et al.*, 1996). The index provides a cumulative evaluation of a sector’s market offering rather than a person’s evaluation of a specific transaction. Called the ‘Customer Satisfaction Index/Barometer’, it has been introduced in Sweden, Germany and the United States of America (Fornell, 1992; American Society for Quality Control 1995; Fornell, Johnson *et al.*, 1996). Taiwan and New Zealand are also in the process of introducing a similar national satisfaction indicator. Data is collected on an annual basis by sampling customers of a representative sample of each country’s largest firms in a range of different industries. The data collected is intended to be comparable across firms, industries, sectors and nations.

The model behind the index uses a multiple indicator approach to measure overall customer satisfaction as a latent variable (see Figure 1 below). Moreover, the model involves a chain of relationships running from antecedents of overall customer satisfaction (expectations, perceived quality and value) to the consequences of overall customer satisfaction (customer complaints and customer loyalty) (National Quality Research Centre, 1995).

It is proposed that this model could be modified to accommodate the ideas outlined in section 5 above to become the basis of a “tourism satisfaction index”. In particular, customer expectations should be modified to introduce measures of customer needs and desires.

While much work still needs to be done, the framework provided by the Fornell model provides a good starting point. It should be possible to make the necessary changes required to produce a useful index that will contribute to the on-going development of this important industry.





**FIGURE 1 : The Customer Satisfaction Index Model**  
[Fornell, et. al. (1996)]

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*Third International & Sixth National Research Conference on Quality Management*

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