Barriers to offering special interest tour products to the Chinese outbound group market

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Abstract

As Chinese outbound tourists expand in numbers and diversity, they may seek more challenging special interest tourism (SIT) activities. Tourists' participation in SIT activities can be profitable to a wider range of providers, enhance destination image, and enrich tourists' experiences. This research investigated the opportunities for offering SIT products to the China outbound group market by interviewing 20 Chinese outbound tour operators to examine the extent of interest in developing the product as well as factors driving or hindering the development. Findings revealed four types of barriers that influence operators' willingness to incorporate SIT activities in their product offerings. Drawing on a critical social theory approach that focuses on 'enlightenment' and 'critique', this paper argues the validity of these perceived barriers - operators are risk-averse for institutionalised practical, social, cultural, and policy-related reasons.

1. Introduction

The concept of special interest tourism (SIT) was introduced in the 1980s and early 1990s (Hall & Weiler, 1992), along with the emergence of 'niche', 'alternative', 'sustainable', 'eco', 'responsible', and 'new' tourism, as an opposition to mass tourism, which was being discredited owing to its homogenous products and negative social and environmental impacts (e.g., Douglas, Douglas, & Derret, 2001). SIT was used to encapsulate the underpinning of 'serious leisure' and tourism, which initially focused on the 'hard' or 'specialised' end of the market, including products ranging from adventure, eco, and sport tourism to cultural tourism (Hall & Weiler, 1992; Trauer, 2006). However, in response to growing consumer demand, operators have diversified their offerings to attract the 'soft' or 'novice' end of the market (Douglas et al., 2001; Morgan & Pritchard, 1999; Trauer, 2006). For instance, outdoor recreation as a component of adventure tourism has become increasingly commercialised and has evolved to be a purchasable short-term holiday experience (Buckley, 2003, 2012; Cater, 2006). As SIT activities have become more accessible, SIT's reach has extended to more novice tourism markets like China.

China has become the largest tourism source market in the world in terms of spending (UNWTO, 2014). Popular long-haul destinations include the US, European countries, Australia, and New Zealand (CTA, 2014). Chinese tourists tend to spend the most on shopping, accounting for one-third to one-half of their total expenditures. Expenditures on

tickets to attractions and entertainment are less than 20% in total (CTA, 2014). Traditionally, the China outbound tourist market has been dominated by group travel, in a large part owing to visa regulations associated with early outbound tourism. Traditional Chinese tourists are sightseers who hastily tick off sight by sight and country by country. However, with the development of outbound travel, the characteristics of Chinese outbound tourists are changing. The new wave of Chinese outbound tourists (group or non-group) seeks more personalised experiences, opening opportunities for previously ‘off the beaten track’ destinations and service providers (Arlt, 2013). This research aims to explore opportunities for (SIT) activities (especially outdoor recreation) and service providers to cater to the Chinese outbound group market.

China has become one of Australia’s most important tourist source markets (Tourism Australia, 2014). Chinese tourists to Australia reached 784,000 in 2014 and contributed more than \$5.7 million (Australian) to the economy. In general, the Chinese visitor market to Australia can be characterised as a multi-destination group traveller (Tourism Australia, 2014), indicating that the group tour remains an important offering for Chinese outbound tourists, and the tour itinerary plays an important role in destination and activities choices.

This research investigates the attitudes of tour operators toward the inclusion of more adventurous SIT activities in the itineraries of package tours. Tour operators are front-line professionals who design itineraries, market and sell tour products to customers, and together with ground operators administer on-site operations. Given the significance of commercial package tours in Chinese outbound travel, understanding tour operators’ views with respect to offering more SIT activities to their customers is important. Investigating from a critical social theory perspective and using qualitative interviews, this paper puts forward a model of the key barriers to Chinese operators’ consideration of SIT products. The research questions of this study are:

1. To what extent do Chinese tour operators have personal experience with outdoor SIT activities?
2. What general attitudes do tour operators hold with respect to incorporating more outdoor SIT into their travel products?
3. What factors contribute to or hinder the provision of these activities to tourists?

The paper investigates the trade or operator perspective on designing travel products for tourists. By understanding the perception of tour operators, destination marketers could develop a campaign to influence attitudes and potentially tap into new markets, enlarge economic gains to a wider range of suppliers, increase economic impact, and promote or renew destination image. By including outdoor SIT activities, Chinese tourists may enrich their experiences and allocate their expenditures differently, resulting in changes to the value system of Chinese outbound tourists.

2. Literature review

2.1 Special interest tourism – Conceptualisation, commercialisation, and market segmentation

Special interest tourism was initially used as a tool to define market segments. That is, travellers' motivation and decision-making to visit a destination could focus on where to go (destination), what activities to pursue (interest), or a trade-off of the two (Hall & Weiler, 1992). This primary motivational focus suggested a difference among general interest tourism (GIT), mixed interest tourism (MIT), and special interest tourism (SIT) (Brotherton & Himmetoglu, 1997). GIT is motivated by destination attributes (where to go), whereas SIT is motivated by a desire to participate in an existing leisure interest or to develop a new interest in a particular destination (what to do). In SIT, participating in special interest activities acts as a primary motivating factor in the choice of destinations, although MIT and SIT to some extent overlap.

As a motivator for travel and a determining factor for destination choice, SIT has been connected with 'serious leisure' and 'enduring involvement'. If participants systematically pursue an activity despite the costs, so much so that they find a career in the acquisition of its special skills and expression of knowledge, the activity becomes their serious leisure (Stebbins, 1982). SIT tourists have been regarded as being 'serious leisure participants' from the 'hard' or 'specialised' end of the market (Hall & Weiler, 1992; Stebbins, 1982). However, the increase of commercialised SIT products has induced a shift of SIT from being connected solely with serious leisure and enduring involvement to being linked to 'casual leisure' and 'situational involvement' (Trauer, 2006). Casual leisure is relatively short-lived pleasurable activity that requires little or no special training and is immediately and intrinsically rewarding (Stebbins, 1997). Responding to a market comprising individuals who are time-

poor but 'experience-hungry' in the post-Fordism era (Opaschowski, 2001, cited in Trauer, 2006), SIT providers have expanded offerings to attract tourists in the 'soft and novice' end of the market who can take part in casual leisure activities (Buckley, 2007).

As an example, adventure tourism, which relies on features of the natural terrain and generally requires specialised equipment, is increasingly taking the form of guided commercial tours (Buckley, 2007). A gradually acquired lifetime skill is no longer essential for participation in some adventure (outdoor recreational) activities, as they have become commercialised, purchasable short-term holiday experiences (Buckley, 2007; Cater, 2006). Surfing, for instance, is generally associated with serious leisure qualities (Barbieri & Sotomayor, 2013). However, with increasing commercialisation of surfing products, many destinations are now offering short-term surf training or simulation surfing to engage the casual and soft end of the market. In 2007, 112 countries offered some sort of surfing tours or had available surfing-related information for tourists (Ponting, 2008). In some destinations, surf tourism is likely to lead to a high-volume model and potentially lower the entry barriers for local entrepreneurs (Ponting & McDonald, 2013).

Within commercialised leisure activities and tours, service providers are responsible for providing safe, pleasurable, sensational, and satisfying experiences to a wide array of customers who range from novices to experts. Tourists are major patrons of these exciting experiences, and regardless of their level of skills, demographics, emotions, expectations, and experiences, they all participate in the same offering (Buckley, 2007; 2012).

Academics have tried to use involvement profiles (i.e., importance, self-expression, pleasure, risk probability, and risk consequence) and involvement kind (i.e., enduring or situational) to segment tourists who participate in SIT activities (e.g., Hall & Weiler, 1992; Brotherton & Himmetoglu, 1997). Brotherton and Himmetoglu (1997) theorised a continuum of dabbler, enthusiast, expert, and fanatic. Trauer (2006) classified participants as novice, collector, and specialist, and conceived zones of exploration, comfort, risk, and high-challenge for these groups. Similar segmentation studies revealed other tourism sectors. For example, McKercher and du Cros (2002) characterised cultural tourists as serendipitous, purposeful, incidental, casual, and sightseeing on the basis of two variables – the importance of cultural tourism in the decision to visit a destination and experiences sought. Mackellar

(2013) divided event audiences into mass event audiences, special interest audiences, incidental audiences, and media audiences.

Definitions of SIT vary, as do assessments of the scale and scope of the market. Despite the origin of the concept and its connection with travel motivation and serious leisure in earlier studies, researchers have increasingly considered SIT as encapsulating a wide range of tourism activities, including adventure, nature-based, religious, culinary, eco, culture and heritage, wildlife-watching, and medical tourism (e.g., Kruja & Gjyzezi, 2011; Trauer, 2006). In most studies and industry reports, tourists who participate in a certain special activity have been referred to as SIT tourists, although this classification has not been based on their primary travel motivation (McKercher & Chan, 2005). This study adopts a broad definition of SIT, comprising a spectrum of activities that cater to the needs of the ‘soft’ to the ‘hard’ ends of the market without taking into account whether participation in SIT activities is a primary travel motivator of tourists in their destination choice. At the same time, to reflect the fact that the participation may not be evoked by a specialist and serious leisure interest, this study also avoids using the term SIT tourists and instead refers to tourists who participate in SIT activities.

Research on Chinese participation in adventure and other SIT activities is limited. China has a passive domestic mass tourism model for river-based adventure tourism (water-rafting) with most participants being 18–35 years old, who are unskilled and passive passengers in very small rafts. The model differs considerably from Western models, which expect greater individual involvement and responsibility for safety (Buckley et al., 2014). Research is needed to explore whether knowledge of domestic adventure tourism practices will influence tour operators’ and outbound tourists’ perceptions of participating in adventure outdoor activities overseas.

2.2 Package tour and tour itinerary

Chinese tourists show a strong preference for group package tours, particularly all-inclusive package tours (Armstrong & Mok, 1995; Wong & Lau, 2001; Wong & Kwong, 2004; Wong & McKercher, 2012). An all-inclusive package tour bundles different products into a single package sold at a single price. The bundled products cover accommodation, meals, sightseeing, commercial transportation, and frequently the provision of a tour guide (Sheldon & Mak, 1987). The package tour format remains a key travel mode for Chinese

tourists to Australia, as spending on package tours and organised tours topped the list of expenditure items for the Chinese market (Tourism Australia, 2014). In 2013, Chinese group travellers accounted for about half of Chinese tourists to Australia (Tourism Australia, 2013). Limited language ability, less international travel experience, and issues related to travel visas are reasons for selecting group package tours. However, preference for the group package tour also reflects the Asian collectivist cultural values and avoidance of high uncertainty to ensure security and reduce perceived risk (Armstrong & Mok, 1995; Meng, 2010; Wong & Lau, 2001).

The itinerary of an all-inclusive package is developed by tour operators to sell the destination. The plan of the itinerary determines what, and to what extent, tourists are in contact with and understand the social and spatial context of the place visited, and whether the tours are informative and entertaining (Wong & McKercher, 2012). A few scholars have discussed factors influencing tour itinerary development for Chinese tourists. For example, top influences for day-tour itinerary selection in Macau include World Heritage Sites, rich culture and long history, high tourist awareness, available parking, safety, short travel distance, important venue for locals, uniqueness, edutainment experience offered at the attraction, and commissions paid at attractions or nearby shops (Wong & McKercher, 2012). For multiple-day outbound tours, price, tourism attraction, operator brand, and hotel are important factors for Chinese in choosing outbound group package products (Chang, Wang, Guo, Su & Yen, 2007). The main components of group package tours include pre-tour briefing, airport, hotel, restaurant, coach, scenic-spot, shopping, and optional tours (Wang, Hsieh, & Huan, 2000).

Competition among operators is mainly based on price. Especially, so-called low-fare tours keep the rack price low to attract tourists but recoup lost revenue through coercive shopping or participation in entertainment (Zhang, Heung, & Yan, 2009). This practice leaves space for additional optional tours, which are usually a cause for service dissatisfaction and disputes between tourists and tour operators (Wang et al., 2000). Scholars recommend that tour operators customise products as consumers are inclined to accept an upgraded product at the initial stage of service customization (Jin, He, & Song, 2012).

Despite the increased importance of the Chinese (and group tour) market as a source of tourism for many destinations around the world, studies are still limited to exploring Chinese tourists' behaviour and experiences (Jin & Wang, 2015). In particular, no studies

have investigated Chinese group tourists' experiences and participation in SIT activities from the trade perspective. Thus, this study examines factors influencing the inclusion of SIT activities, and especially active SIT pursuits, in tour itineraries for Chinese outbound tourists. Special interest activities are dynamic and can be destination-bounded as they require certain natural features and specialised equipment. In light of the abundance of SIT options in Australia and the increasing number of Chinese tourists to Australia, this study uses Chinese tourism to Australia as the research setting to explore the experience and interests of Chinese tour operators, as well as the opportunities for and barriers to developing such products.

3. Methodology

This research takes a critical social theory perspective, which regards realities as socially and historically framed as well as reflecting power relations (Jennings, 2009). Studies under the critical social theory paradigm are not only reflections of social reality or forecasts of future changes, but are 'enlightenment' and 'critiques' (Leonardo, 2004). The purposes of such studies are to initiate reflection and awaken consciousness for a more rational society (Leonardo, 2004). This approach is used in this research to critique the socially and historically framed Chinese package tour operation with the aim of moving toward a more rational and entrepreneurial practice that offers greater opportunities for experiences that enhance tourists' personal enjoyment and development.

To this end, the research utilises a qualitative method (individual or small-group interviews) to explore Chinese tour operators' experiences, attitudes and factors contributing and hindering SIT products development. Group and individual interviews constitute valid methods of gathering information because they allow the researcher to approach target informants, understand their perceptions, identify relevant issues, and provide insights and solutions. The interviews are flexible in nature and can collect real, rich, and deep data (Strauss & Corbin, 1990). The focus group is an efficient way to gather information through interaction and discussion among a panel of people. However, when dealing with professional people, group interviews cannot always be organised owing to logistical constraints. One-on-one and face-to-face interviews are regarded as appropriate alternatives for exploring the views, attitudes, or beliefs people may hold. In this research project, four key interviewees – directors of four tour companies in the Oceania market – could not participate in the focus group discussions owing to time conflicts and distance or

transportation constraints. Thus, the current research project used both group and individual interviews to gain in-depth understanding of tour operators' personal experiences, attitudes, and perceptions of contributing or constraining factors relating to the development of SIT activities for their customers. Tour operators are likely gatekeepers of what is offered to their customers and are expert informants.

An interview guide was developed prior to conducting the interviews. The purpose of the interview guide was to ensure that the discussions covered important areas. To ascertain tour operators' personal views on developing SIT products for the Chinese outbound market, the researchers explored the tour operators' own SIT experiences and attitudes, as their personal experiences and attitudes may influence their attitude toward developing related tour products. Thus the topical areas of discussions included (1) operators' own SIT experiences and attitude; (2) current tour itineraries and activities; (3) appropriateness of some SIT activities for their customers; and (4) contributing factors, concerns, and barriers to developing SIT activities. Questions were developed on the basis of generic literature relevant to the topic area and were designed to probe the perceptions and insights of informants.

Participants were recruited using a referral system based on the researcher's personal contacts and tour operators' recommendations. In the recruiting process, consideration was given to obtaining participants who were from tour companies of a diversified scale, ownership structure, and geographical coverage and were in charge of a major outbound market (preferably the Australia market). As a result, data come from four individual interviews (Informants 1-4) and two group interviews (Informants 5 – 20), with informants working for 11 tour companies of varying ownership structures (e.g., state-owned, private, and joint partnership with overseas partners). These 11 tour companies were located in three main source cities for Chinese outbound travel – Guangzhou, Shenzhen, and Beijing (CTA, 2014). These companies were leading tour operators, with six of them among the top 10 Chinese tour companies in terms of business volume. Most of these companies offered both wholesale and retail tour products. Before the start of the interviews, informants filled in a participant's demographics form, which requested information on name, gender, age group, position in the tour company, markets served, times of overseas travel, countries visited in the past two years, previous visits to Australia, and destinations visited and activities participated in while in Australia. Respondents were 10 female and 10 male informants. Twelve

informants were below the age of 35, and eight were above 36. Younger informants mainly worked in lower positions marketing and selling tours to Southeast Asia. Ten informants were the director of the Oceania market (i.e., Australia and New Zealand). Nine of them had visited Australia multiple times. The representativeness of the informants for the operator population is ensured. Table 1 details the respondents' profiles.

Insert Table 1 about here

All interviews were conducted in the meeting rooms of the tour companies' offices. Group interviews lasted about 90 minutes each, and individual interviews lasted about one hour. All sessions were audio-taped and then transcribed verbatim. One researcher conducted all the interviews so as to ensure familiarity with the topics covered. All content was spoken, recorded, and transcribed in Chinese.

The empirical materials derived from the interviews were interpreted using content analysis, and the computer software NVivo 10.0 was used to manage the transcripts and analyse the materials. Data analyses followed the process recommended by Berg (2001). First, the raw materials were read and re-read for the purpose of increasing familiarity, reflection, and preparation for coding. Second, a coding frame was generated, based on categories identified in relevant literature and on an open coding process developed from the data without reference to pre-conceived ideas (Strauss & Corbin, 1990). As coding is an iterative process, new codes were generated and added to the coding frame during the process as required. Finally, a grounded coding list was further grouped with the application of the concepts in accordance with the theoretical framework. Analyses were conducted using the original Chinese dialogue, with the primary analysis being conducted by the lead researcher. A bilingual PhD candidate was also employed to independently content-analyse the transcripts using NVivo 10.0 with the coding frame provided but without knowledge of the analysis completed by the lead researcher. The outcomes of the two separate analyses reflected about 80% agreement on categorization of the themes and quotations, which was deemed acceptable (Perreault & Leigh, 1989). The authors resolved the inter-researcher differences through discussion and by reviewing the transcripts. In reporting the results the researchers gave each interviewee an ID number with his or her key characteristics, and quotations were translated into English for reporting purposes.

4. Findings

4.1 Informants' personal experiences in SIT activities

To explore whether the Chinese tour operators were experienced in SIT activities, informants were asked to describe their personal experiences in the area. Findings indicate that operators have varying SIT experiences (Table 1). These experiences range along the continuum from the very thrilling and adventurous end to the more soft and relaxing end and covering a wide assortment of activities, such as bungee jumping, skydiving, hot air ballooning, glacier walking, cruising, whale watching, diving (snorkelling and scuba-diving), biking tours, hiking, golfing, and wine-tasting. The sample was broken down into soft and hard (active, higher risk) experiences. Soft SIT experiences were primarily visiting wineries and farms, taking cruises (whale-watching), and golfing. In describing hard (or higher risk) SIT experiences, informants unanimously used words such as 'thrilling', 'enjoyable', 'extraordinary', and 'wonderful'. They also admitted that while they or their relatives were worried prior to their tours, during the tour they felt safe and secure, free from worries. They gave high appraisals to the professionalism of the SIT service providers. Selected quotations are presented below.

I was on a familiarisation trip to Victoria State and we tried some of the water and air-based activities, including my first skydiving experience, very thrilling (ID6, female, 26-35).

[In a familiarisation trip] we had a walking tour, a bike-ride, and we took a hot air balloon, thrilling.... on another trip that I was tour leading, no tourists dared to try bungee jumping. I jumped. It was a thrilling experience but quite an accomplishment. They (the tourists) all said that I was very brave (ID3, female, over 45).

We had a glacier tour. It was my first time. I feel it is adventurous. My family was worried, because the tour is regarded as dangerous. I was concerned too, because I've had no such experience. When we got to the glacier site, we found that we were well equipped. Before we went onto the helicopter, we were given a brief about things we need to pay attention to. Then coaches taught us how to wear skates, what to look for and what to avoid. The guide also explained things to us all the way while we walked down. The experience

was much better than I imagined. I did not feel [it was] a little bit dangerous. It was very safe, and the views were very beautiful (ID5, female, 25-36).

Overseas SIT experiences seem to come along with work opportunities. Operators in senior positions (e.g., general and department managers supervising the Oceania market) had more experiences than those in junior positions (e.g., sales representatives supervising Southeast Asia market). Most of the higher risk SIT experiences were recent and were the tour operators' first attempts at these activities, usually conducted as part of their familiarisation trips to a destination and partially sponsored by the destination marketing organisations (DMOs) at federal, state, or local levels. With regard to the higher risk SIT experiences, informants can be classified as SIT novices (Trauer, 2006) or dabblers (Brotherton & Himmetoglu, 1997).

4.2 Perceived current and prospective participation in SIT activities

Informants were asked to indicate the current level of participation in SIT activities by group tourists and to provide their perspectives on the development of these activities in their tour offerings in the near term. Table 2 summarises the perspectives of the informants, broken down by current participation level, destinations, perceived level of difficulty, perceived level of interest, and level of their recommendation. Informants stressed that seeing Australian animals is an exciting activity, especially when captured in photos. This sentiment is evident in Table 2, as wildfire watching and farm tours are the only two activities that had a 'high' rating in current participation and high level of recommendation from the perspectives of operators. The interaction with Australian animals could be in a zoo environment, on a tourist farm, or in a natural habitat. According to the informants, watching wildlife in their natural habitat could increase tourists' feelings of adventure. Apart from wildlife watching, most other air-, land-, and water-based SIT activities were not perceived as appealing to group tourists and were not highly recommended by tour operators. Informants' references to water-based activities were mixed. They regarded activities such as snorkelling, seaplane rides, and whale-watching as having a higher level of participation and interest, but still had concerns about including these activities in their travel itineraries for various reasons, which are discussed in the next section.

Insert Table 2 about here

4.3 Barriers to incorporation of SIT activities in tour itineraries

Informants were asked about their interest in selling SIT activities to their customers. In the current itineraries, prepared by tour operators for Chinese tourists to Australia, activities with certain SIT characteristics (e.g., visiting farms and wineries) are popular items. Visiting tourist-oriented farms (e.g., Paradise Country in Gold Coast) is on the tour itineraries of a few tour companies. Other more active, adventurous outdoor experiences are not normally included in package tour itineraries but have been explored by tourists as optional tours (e.g., snorkelling at the Great Barrier Reef). Despite informants' acknowledgement of their own enjoyment and sense of accomplishment from the active SIT activities, they were concerned about incorporating most of these SIT activities into their tour itineraries. The study's results offered no evidence that they wanted to add these 'hard' SIT activities to their travel itinerary or marketing of their products. Their concerns and perceived constraints, hereafter named as barriers, can be categorised into four broader areas, which are reported below. On the basis of the findings, we formulated a conceptual model delineating and categorising factors influencing the development of SIT activities for the Chinese market (Figure 1).

Insert Figure 1 about here

Barrier 1 – Operational risks and constraints

In the interviews, informants pinpointed a number of factors they considered to be important for the development of package tour products. These factors included (1) price, (2) time required, (3) activities suitable for group conformity, (4) destination image and activities, (5) market demand and social trends, (6) impacts of promotion, and (7) other considerations. They classified the first three factors as operational and the latter four factors as market demand (promotional) factors. The current Chinese outbound market seems to be highly price-sensitive and Chinese tourists are not loyal to any specific operators or brands. Inclusion of adventurous SIT activities will raise the rack price advertised, resulting in tourists moving to other operators and the tour company losing competitiveness in the market.

These activities will raise the package price and the tourists are highly price sensitive ... (ID 7, male, 36-45).

Further, informants indicated that dedicating time for SIT outdoor activities, which usually require a half day, conflicts with the strong desire of Chinese package tourists to see

as many places as possible on a single trip, especially when this trip is their first visit to a destination, as is always the case for most package tourists. Currently, except in Cairns, where tourists can try water-, air-, and land-based activities (e.g., snorkelling, seaplane rides, 30- to 60-minute walks in the theme park), tourists have no access to SIT outdoor activities in most destinations.

Chinese tourists just want to see as many places as possible in a few days in their trips... most of these activities take a few hours to do... (ID 6, female, 26-35)

Moreover, informants worry that of the usual 30 tourists in a group, only a small number may be interested in SIT activities, and that inclusion of SIT activities in the tour itinerary may have a negative impact on group cohesiveness. The variety of customer demographics in gender, age, interests, physical abilities in the same group makes cohesiveness difficult except with respect to general sightseeing. A further constraint is the code of business standards for the Approved Destination Status (ADS) group visa – a scheme approved by bilateral governments to allow Chinese tourists to travel overseas in guided groups (<https://www.austrade.gov.au/Tourism/Tourism-and-business/ADS>). Although the ADS code allows free time (two blocks of up to 12 hours each) and flexible tour arrangements (e.g., one half of the group goes shopping and the other half visits a museum) to be written on an ADS itinerary, the number of clauses and their meticulous description, as well as the complexity in operation, often confuse operators and result in unwillingness to allocate free time or provide flexible tour arrangements to tourists:

You cannot let others (non-participants in the group) wait...we cannot write 'free time' in the itinerary, as according to ADS code for group visa, activities for each day of a trip must be specified....(ID 9, male, 36-45).

In addition, informants believe active SIT activities presently appeal to only a small niche market that is inconsistently represented among package tourists. Therefore, developing regular SIT products for an inconsistent and unstable number of tourists is not financially viable. The view was held unanimously among informants.

We tried... for example, last year we developed a five-day Cairns-only tour during the Chinese New Year holiday (high season). To be honest, tourists' feedback was not great. Because the tour is not cheap, tourists feel since I have spent so much I might as well go to more places (ID 10, female, 26-35).

Barrier 2 – Perceived physical and financial risks

According to the informants, except activities that sit on the extreme soft end of the adventure continuum, such as wild-life watching in a comfortable setting, most of the active SIT outdoor activities hold potential physical risks to tourists, hazards to the smooth completion of the tour operation, and financial risks to the company. The active SIT outdoor activities, water-based activities in particular, were perceived as requiring a high level of physical skill acquired over a long term. Thus, swimming in the sea was regarded as very risky and was almost prohibited by operators. Snorkelling was, without exception, regarded as risky and to minimise risks operators chose not to include it on an itinerary. As snorkelling is a popular must-do activity at Cairns and the Great Barrier Reef, a large number of Chinese tourists try snorkelling, but they do so as an optional addition to the package tour, out of their own intentions and clear of Chinese operators' liability. For those tourists, operators would recommend wearing lifejackets during the process to avoid any potential hazards. Operators argued that although snorkelling is a popular optional activity for Chinese tourists, most of the tourists are not swimmers and having to snorkel wearing a life jacket would limit their enjoyment of the activity. A junior operator shared her personal experience in trying the activity in South East Asia:

We tried snorkelling but did not dive down. I was really afraid because I am not a swimmer. But, seawater is so beautiful, so blue, with a bit of current. A number of Chinese tourists who were in their 30s tried to dive down. What happened was quite pathetically funny. They could not come back. Snorkelling equipment was very simple, just a mask, a tube and there you went. The beginning was ok but later they drifted away and could not get back due to the current. Fortunately, there was the rope, and they got themselves back by holding on to the rope like playing a tug of war, yet with the help of the staff working on the platform (ID 14, female, under 25).

As the quotation reveals, even the relatively soft SIT activity of snorkelling proved very

challenging to Chinese tourists. Informants were deeply sceptical of their customers' ability to participate in most of the active SIT outdoor activities.

The perceived lack of Chinese tourists' skills in active SIT outdoor activities resulted in operators' high ratings of risk levels of these activities, even with these activities listed as an optional addition. Informants were wary of the prospect that they would have to bear liability or deal with 'tough' and 'irrational' tourists when injuries incurred. One informant used one case – a dispute between her tour company and a tourist who suffered a minor injury – to illustrate her reasons not to include snorkelling in the travel itinerary and not encourage tourists in trying.

Although all of these commercialised SIT activities conducted in Australia have high safe levels, and every participant will sign a service agreement with the service provider in terms of safety and injury issues, there will be a capped compensation for injuries or other occurrences. We feel worried. Chinese tourists have a mentality, i.e., the tour operator is responsible of my safety no matter what happens, because I am part of your tour. Once, we had a guest who tried snorkelling and suffered some minor ear problem afterwards. The tour guide took her to the hospital and was assured there was no problem. But the doctor advised she might not take an immediate long haul flight just to be on the cautious side. The tourist insisted that we had to pay for all costs resulting from her extended stay. I am seriously concerned about such incidents and situations. There is a reason why we put all these activities as optional and self-paid (ID 4, female, 36-45).

According to informants, such 'tough' and 'irrational' tourists were widely encountered across tour groups, and dealing with these tourists illustrates the power struggle between service provider and customer. In addition, informants were concerned that the travel insurance tourists bought would not be adequate to cover the financial costs of the potential damage. Although tour operators reiterated that their role was to help tourists settle compensation deals with an insurance company, it was usually a struggle between the operator and the tourist on the issue. As a result of the potential difficulties, operators perceived the risk probability of most SIT outdoor activities as very high and the consequences as serious.

Barrier 3 – Perceived lack of market demand

Informants perceived Chinese tourists' awareness of the availability of a diversified range of SIT activities in Australia to be very low. They did not see market demand by tourists owing to the low awareness level and the perceived individual-related attributes (i.e., affective and cognitive attributes). One of the informants said, *'I've never heard of any customers demanding to participate in outdoor activities in Australia. Rarely guests would ask if there is rafting in the tour package'*. However, she also admitted that *'I've never done any real market research'* (ID 2, female, 36-45). This notion is commonly shared among informants. Thus, without the push from potential tourists, travel agents are not readily willing to promote active SIT activities.

Informants also related the low market demand to promotional activities, as demand is likely to be related to perceived destination image, promotion by DMOs, promotion by operators, and media publicity. As a result, what tourists choose depends largely on what is promoted through various channels. Promotion from the operators' perspective is far from satisfying, because tour operators also lack familiarity with SIT products. Most operators (front-line or product-development employees) are SIT novices themselves. They sometimes misunderstand SIT operations and may have unwarranted fears of developing a product. For example, one informant rated kayaking as risky and not suitable for package tourists because *'kayaking in China is not a mainstream activity'*. She also commented:

The sea waves in China are relatively small but waves are huge in many places in Australia. Because we give high priority to safety considerations, we probably would not consider trying kayaking (ID 1, female, 26-35)

The remark showed that the informant did not know that most kayaking tours are conducted on calm sea water or on rivers. One informant noted that one of the key difficulties in promoting SIT activities to customers was that *'we agents did not have relevant experiences to bring the potential and value of SI activities to customers and promote them'* (ID 2, female, 36-45).

Informants indicated that promotion of SIT activities has a marked effect on market demand. For example, the popularity of taking seaplanes in Cairns is deemed as stemming from the promotional materials, as one of the informants stated:

Many tourists try seaplanes, because when Cairns promotes the destination in lots of its brochures, the images/photos are taken from the air, so tourists want to see the place as the way it is presented in the images. We would say you have to take the seaplanes to get that view. So they do. And they feel great from the experience (ID 5, female, 26-35).

Barrier 4 – Perceived lack of cognitive and affective attributes of the activities to Chinese tourists

Informants shared the view that Chinese tourists have not developed the affective attributes (i.e., importance, enjoyment, centrality, and self-expression) relating to active SIT outdoor activities. Informants therefore would not see participation in SIT activities as important for tourists' travel experience. They assumed that tourists might not realise the joy and value that could be derived from participating in these activities. This lack of the affective dimension toward active SIT outdoor activities is primarily related to Chinese tourists' understanding of what tourism is. A typical quotation on Chinese tourists' motivation and conceptualization of tourism is the following:

Chinese tourists are travelling mainly for relaxation and leisure purposes. This is the Chinese tourists' understanding of tourism. It is a conceptual issue. For example, the concept of hiking is not well understood by Chinese tourists, including myself. The first time I went hiking, as a part of a familiarisation trip, I felt strange why DMO arranged such an activity onto our busy schedule. But after the tour, I felt it was one of my best experiences. There are many hiking tours in Australia, but Chinese tourists' understanding of tourism is sightseeing and relaxing, hiking is not yet an accepted concept (ID 1, female, 26-35).

The lack of affective attributes also relates to tourists' lack of knowledge about the SIT outdoor activities. Travel agents believe that tourists generally have little knowledge of these activities and are not familiar with the settings. They have not actively searched for information about these activities. One of the informant commented:

Chinese tourists do not have knowledge about these SIT activities. Unlike Western tourists who search travel-related information on their own, Chinese (group) tourists rely on travel agents to provide information to them. They want us to describe the experience and tell them what they can get out of the experience (ID 7, male, 36-45).

Informants perceived that Chinese tourists did not understand the value of some SIT activities or fully appreciate them, as that is not part of their value system or their lifestyle. Informants consistently compared Chinese tourists to Western or Japanese tourists to illustrate that Chinese tourists lack appreciation of SIT activities. Two informants commented on their experience in leading Chinese tourists in tours to Uluru:

Most Chinese tourists would not like Western Australia, like Uluru. Western tourists may like watching the rock turning colour from dawn to sunset and have a so-called silent dinner under the stars. But Chinese are not accustomed to having a two-hour dinner in the dark in the middle of nowhere only listening to the birds. Chinese would rather go to play something or see something that they've never seen... (ID2, female, 36-45).

Most Chinese tourists have no interest in the night sky, in the constellations. They would say, hey, that looks good, but if you explain to them one by one what these stars are, they would feel bored. They could not sit there for two hours for the stars. Too long for them. Forty minutes would be okay. They even suggest having a mah-jong table provided if it has to be two hours, so that they can play it. I say, it is the night sky, the birds, the silence of the land, that are the attractions. What do all these mean if you play mah-jong here... (ID 3, female, over 45).

Chinese tourists might not be interested in the activities or regard them as relevant to their lifestyle. The perceived lack of importance is also related to price sensitivity of the Chinese tourists. For example, one informant compared her perceived differences between Chinese and Japanese tourists regarding Sydney's New Year's Eve fireworks show:

New Year's Eve fireworks is in fact a very good experience. But compared to, say, Japanese tourists who will book far in advance for a seat to have a good view of the scene, Chinese tourists won't. It is fine for them to have a good festival experience, but if that experience demands additional cost or effort, they would feel that is less than ideal (ID 4, female, 36-45).

Owing to safety issues, only SIT activities on the very soft end of the adventure continuum were market-tested by operators, but these activities were not believed to arouse high levels of enjoyment in tourists.

[For example,] whale watching did not give a surprising experience to tourists, not the shocking or ecstatic kind. It was just an okay experience to tourists. And there is a word of mouth effect in the market. If tourists come back and say it is not a shocking experience, the number of tourists for this activity will then decline (ID 1, female, 26-35).

When asked about the kind of activities that Chinese tourists appreciate most during their trips, informants unanimously stated that Chinese tourists would like to ‘have interactive hands-on opportunities like visiting a farm and cuddling a koala’ (ID3, female, over 45). Good experiences to Chinese tourists are those that they could get without expending much physical energy, as ‘Chinese tourists do not want to get tired while travelling’ (ID8, male, 36-45). Informants believe that Chinese tourists have a stronger inclination for cultural products (farms and animals are regarded as ‘cultural’) than for physical products (SIT outdoor activities are regarded mostly as requiring physical investment and thus are not cultural).

5. Discussion

This paper investigates Chinese tour operators’ experiences with SIT activities along with their attitudes and perceived opportunities and barriers in providing adventurous SIT activities to Chinese group tourists visiting Australia. Findings indicate that most operators interviewed had first-hand pleasurable experiences in various SIT activities. They also attached an affective and self-accomplishment component to their own experience. However, almost all informants’ participation could be classified as ‘dabbler’ (Brotherton &

Himmetoglu, 1997), ‘novice’ (Trauer, 2006), ‘casual’ (McKercher & du Cros, 2002), or ‘incidental’ (Mackellar, 2013), according to the frequency and intensity of the experiences they described in the interviews. This categorisation has implications for their attitudes toward integrating active SIT activities into their own travel products.

Operators are generally not enthusiastic about developing these products for their customers. While informants did not rate their own experiences of active and adventurous SIT as high-risk, they did attach a high-risk probability to the same activities if they were to be included in tour package offerings. Operators would mostly consider the negative impact of these products rather than what their customers would get out of the experiences, such as self-expression, self-accomplishment, affection, enrichment in life experience, and connection to a destination or their company. This perspective reveals a conflict between operators’ own experiential delight and their initiative to actively commercialise such enjoyable experiences to a wider cohort of Chinese tourists. As a result, the structure and key components of group tour products – i.e., sightseeing and shopping (e.g., Wang et al., 2000) – may well remain unchanged for the Chinese group tour market in the foreseeable future.

The four barrier categories identified by this research – operational constraints, physical and financial risks, lack of market demand, and lack of cognitive and affective attributes – are intertwining factors. From a critical social perspective, these barriers could be more perceptual than factual. The tour-operating industry in China is a historically framed low-profit and low-price industry, as reflected in the popularity of low-fare tours for promotion and operation for the group tour market (e.g., Zhang et al., 2009). Operationally, tour operators fear losing market competitiveness if new products with a SIT component result in a price higher than that of their competitors. The ADS group visa requirement is a policy-related constraint and creates further obstacles for operators’ exploration of the heterogeneity of tourists in a package group and diversification of products to cater to the SIT segment. Tour operators are not keen to segment markets so that they can test-run some of the more novel products to specific segments, probably owing to the complexity in segmenting the market in practice. However, package tour groups are always composed of tourists who have different levels of motivation, knowledge, and interest in trying new activities and experiences. How to satisfy the SIT-interested tourists while not interrupting the tour itinerary or impairing the convenience or enjoyment of other tourists is an area these informants did not seem to sufficiently consider. There are opportunities for formulating a

business model and developing smaller groups and more niche groups that require action from the operators' perspective.

The perceived physical and financial risks seem to be shaped by perceived lack of physical capabilities, lack of knowledge about adventure products, and operators' negative experiences. Our research revealed some areas where SIT can easily be adapted to the Chinese tour market. The key areas are where the operators identify activities that involve low to moderate participation and low to moderate risk yet are likely to be of high interest to tourists. For instance, four-wheel driving is seen as low risk but of high interest. Thus, this activity might be a gap that SIT operators can build upon. The results suggest that these aspects could be addressed by a series of measures, including detailed briefing and pre-trip training (preferably in Chinese language) on skills needed, safety considerations, and insurance coverage.

The perceived lack of market demand does not motivate operators in product innovation. Operators believe that most Chinese group tourists have little awareness of SIT activities. Moreover, operators also lack familiarity with SIT products and thus they have difficulty promoting SIT products to the market. This unfamiliarity highlights the need for further awareness in developing SIT products for the Chinese outbound group market. This research indicates that national and state tourism bureaus in Australia and New Zealand have been active in promoting SIT activities to Chinese operators via familiarization trips and events, and marketing materials (print and social media) indeed help sell SIT products to tourists. This research further verifies the role marketing plays in creating demand.

Informants assumed that SIT activities are not central to the lifestyle of Chinese group tourists, resulting in low affective attachment (e.g., value, importance, enjoyment, and self-expression). However, a lack of centrality does not mean that no market exists for the product or that tourists are not enriched by the experience. For example, even for 'incidental' event audiences, an event can be an experience that leaves a deep impression and significantly influences visitors' perceptions of a destination, providing a lasting marker and connection to the destination (Mackellar, 2014).

Given operators' own experiences and their lack of initiative in developing SIT products, two questions arise. Do tour operators really understand the market? Do tour

operators want to bring rewarding products to the market? Further, the affective attributes are culture- and value-system-related concepts. Although Chinese tourists are perceived as highly price-sensitive, they are the primary source market in terms of spending (UNWTO, 2014). Shopping – purchasing luxury brands for use back in their home country – is the largest single spending item (CTA, 2014). Chinese people place great importance on the anticipated reactions of others. The content and style of consumption can be seen as a component of status competition and is related to their ‘public self’ (Wang & Lin, 2009). Purchasing overseas helps tourists impress others with their ability to go abroad and pay high prices for prestige products. If in the future practicing a style of life becomes a serious undertaking that interlinks those claiming to be successful or aspiring to be successful, and is part of status competition, a rapid and large-scale change in consumption will occur, reflecting that kind of life-style and being quickly picked up by elites in China (Wang & Lin, 2009). Chinese tourists’ current expenditure priority for shopping in outbound travel represents the current value system among Chinese tourists – going after International luxury brands. However, this practice may change with changing social trends. If gaining exciting and novice experiences from SIT activities becomes a social trend, the market will grow significantly.

Practical implications for tour operators

This research points to several practical implications for specialist SIT operators who want to target Chinese tourists. First, careful consideration must be given to the price point of any offerings. The Chinese tour operators indicated a high degree of price sensitivity. It may be that SIT operators can emphasise the value of the experience or modify the product to better fit a budget price zone. Linked to this consideration is the idea of offering ‘taster’ experiences, such as shorter SIT experiences in the early introduction of these products to the Chinese market. This approach may facilitate more affordable experiences while also allowing experiences to be scheduled into very tight itineraries – important considerations if SIT experiences have to be added to ADS itineraries. SIT operators need to work more closely with DMOs to incorporate more SIT activities into general promotional materials, and promotional material need to emphasise the affective elements, using Chinese nationals in SIT images and promotions, to highlight the thrill, personal growth, and status of engaging in the activity.

Practical implications for DMOs

This research also has several practical implications for DMOs. Presently a general shift is occurring in Chinese society, from passive to active participation in leisure and tourism to becoming more involved in the outcome or overall experience. SIT activities can offer an experience that leaves a deep impression and has an important influence on a traveller's perceptions of a destination and provide a lasting memory and connection to a destination. This effect will help create a destination image and loyalty to a destination in the form of repeat visits and WOM. Given the likely impact of promotion on creating market demand for SIT activities, destinations should actively promote SIT activities to the general public via multiple sources (e.g., mass and social media), thus making SIT activities an important section in destination image building and marketing. Destinations should also facilitate the development of these activities by providing more familiarisation trips to tour operators, educating on insurance and training high-quality (and in this case preferably Chinese-speaking) tour guides with SIT knowledge to enhance the participation experience. The issue is thus whether and how tour operators and DMOs play a role in cultivating social trends for a specific market.

Future directions

This research is one of the first empirical studies to explore engaging new markets (in this case – Chinese tourists) in SIT activities, investigated from the trade perspective. A framework depicting barriers for development is proposed, built upon previous studies on involvement and package tour characteristics. By indicating the perceived operational, physical, and financial risks, and integrating the risks with perceived personal system (cognitive and affective attributes) and market demand from the trade perspective, a better understanding of contributing/hindering factors expanding SIT activities to the novice market is gained. This research suggests that Chinese tour operators are risk-averse and not entrepreneurial, and the institutionalised industry framework may be one reason for this inertia in product innovation. Chinese visitors are becoming more experienced travellers and increasingly opt for independent travel (FIT), which could be a factor that propels tour operators to innovate group tour products. Given the fact that many Chinese outbound independent travellers actually join local one-day package tours at destinations in Australia (and tours are usually operated by overseas Chinese), investigating the perceptions of these Australia-based tour operators is important. Future studies can also explore whether the perceived barriers identified by Chinese tour operators resonate with the perceptions of

consumers, and if the perceived elements (e.g., affective, cognitive attributes, risk probability, risk consequences) affect consumers' behavioural intentions in pursuing, participating, and enjoying SIT products while travelling abroad. Future research can also explore whether participating in SIT activities results in transformative learning and personal development. If the relationship is positive and strong, the market demand for SIT activities will surely increase, becoming a driving factor for change in product offerings.

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Table 1 Interviewee Profile

ID	Gender	Age group	Position	Main markets supervised	N. of overseas trips	Countries visited in the past two years	Been to Australia	In which years	Destinations visited in Australia	Activities
1	Female	26 – 35	General Manager	Antarctic/ Australia/ New Zealand/ Fiji/ Tahiti	6	Australia	Y	from 2005	Sydney/ Melbourne/ Cairns/ Brisbane/ West Australia/ South Northern Territory	Helicopter/ City tour/ Water Sports/ Cuisine experience
2	Female	36 – 45	General Manager	Australia/ New Zealand	multiple	Australia	Y	per 1 or 2 times every year	Northern Territory/ South Australia/ East Australia (main cities)	Hot air balloon/bungee jumping, etc
3	Female	over 45	General Manager/Product development	Global	multiple	UK/ Schengen countries/ Central Asia/ Asia	Y	2007 & 2009	West Australia	Amphibious vehicles/ diving/skydiving
4	Female	36 – 45	Department Manager	Australia/ New Zealand	8	Australia	Y	2012	Sydney/ Melbourne/ Brisbane/ GC/ Cairns/ Adelaide/ Hobart/ Launceston/ Perth/ Alice Springs	Helicopter/ City tour/ Golf/ Cruises/ Wine tasting/ SPA
5	Female	26 – 35	Senior manager, Product development	Australia/ New Zealand	8	Australia	Y	2012	Sydney/ Brisbane/ GC/ Perth/ Melbourne/ South Australia/ Tasmania	Diving/ Hot air ballooning/ Amphibious vehicles/ Riding etc
6	Female	26 – 35	Sales Manager	Australia/ New Zealand	3	Australia	Y	2007	Sydney/ Cairns/ Brisbane/ GC	Diving/ Zoo/Glacier/4-wheel driving etc
7	Male	36 – 45	General manager	Australia/ New Zealand	10	Middle East/ Europe	Y	2000-2011	Sydney/ Brisbane/ Cairns/ GC	Travelling/multiple activities
8	Male	36 – 45	Sales Manager	HK/ Macao/ Taiwan Southeast Asia/Australia/ New Zealand	8	Korea/Australia/ etc	Y	2011	Sydney/ GC	City tour/ Golf

9	Male	36 – 45	General Manager	Global	6	North America	Y	2009	Sydney/ GC/ Cairns/ Melbourne/ Brisbane	Travelling/ Cruises/other activities
10	Female	26-35	Sales manager	Australia/ New Zealand	4	Dubai/ New Zealand	N			
11	Male	36 – 45	General Manager	HK/Macao/Southeast Asia/ (Heilongjiang/ Jiangsu/ Southeast Asia)	10	Thailand	N			
12	Female	Below 25	Sales	HK/ Macao/ Taiwan (Mongolia/ Sichuan/ Zhejiang)	nil		N			
13	Male	Below 25	Sales	HK/ Macao/ Southeast Asia	1	Thailand	N			
14	Female	Below 25	Sales	Southeast Asia	2	Southeast Asia	N			
15	Female	Below 25	Sales	southeast Asia	nil		N			
16	Male	Below 25	Sales	HK/ Macao/ Taiwan/ Thailand	6	United Arab Emirates	N			
17	Male	Below 25	Sales	Southeast Asia/HK/ Macao/ Island Nation	1	Thailand	N			
18	Male	26 – 35	Sales/ Product development	Thailand/ Indonesia	2	Thailand	N			
19	Male	26 – 35	Sales	HK/ Macao/ Southeast Asia/ Singapore/ Malaysia (Shanxi)	3	Thailand	N			
20	Male	36 – 45	General Manager	Local market/ product design, R&D and marketing	3	Thailand	N			

Table 2 Activities for development

Activity Type	Current participation level by tourists	Tried Destinations in	Perceived difficult level	Perceived physical risks	Perceived Level of interest	Level of recommendation	No. of Reference	No. of Sources
Air-based								
Bungy jumping	L	C	H	H	L	VL	2	2
Hot air ballooning	L ->M	C/GC	M	M ->H	M	M	12	5
Sky diving	L	C	M ->H	M ->H	M	M	17	6
Land-based								
Bridge climbing	L	S	M	M	M	M	4	2
Four wheel drive	L -> M	C	L	L	H	H	10	6
Hiking/bush walking	L	C	M->H	M	L	L	17	7
Water-based								
Snorkelling	M->H	C	H	M	H	M	21	7
Jet boating	L	GC	L	L	N/A	N/A	4	3
kayaking	VL	nil	H	H	L	L	7	3
Sea plane	L	C	M	M	M	H	10	6
Surfing	Nil	nil	H	H	nil	Nil	5	4
Whale watching	L->M	C/GC/T	L	L	M->H	M->H	21	5
White water rafting	VL	C	H	H	VL	VL	9	6
Wildlife watching	H	GC/S/C	L	L	H	H	4	4
Farm tour	H	GC/M	L	L	H	H	6	3
Wine tour	M	GC/M	L	L	H	H	8	4

Note: H: high, M: medium, L: low, VL: very low; C: Cairns, GC: Gold Coast, M: Melbourne, S: Sydney, NT: North Territory, T: Tasmania, P: Perth; Reference: coded phrases/sentences that comment on the activity; Sources: sources that contain a coded item. One focus group is regarded as one source, so it is with one interview. There are seven sources altogether in the NVivo data.

Figure 1: Factors affecting the offering of SIT activities to Chinese outbound group tourists