

# **Sightseers without Borders: An Exploration of Inclusive Travel Products for People with Diverse Visual Abilities**

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# Affidavit

I hereby affirm that this dissertation represents my own written work and that I have used no sources and aids other than those indicated. All passages quoted from publications or paraphrased from these sources are properly cited and attributed.

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# Acknowledgments

This dissertation is the result of work that lasted for several years – work that included completing PhD level courses, finding and developing a research topic, familiarizing myself with the literature, designing studies, learning methodologies, collecting the data, analyzing the data, presenting at conferences, receiving feedback, incorporating the feedback, and finally, writing, re-writing and then re-writing again hundreds of passages of text. No “Methodology” section can describe the full range of activities that were necessary to complete this research, especially those related to project management. This work, however, was not without the support of many people, whose contribution needs to be acknowledged.

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-KT

Vienna, March 27, 2019



# Publications and author's contribution

Parts of the Preamble of this dissertation have been used in a manuscript with the title “Accessible and equitable tourism services for travelers with disabilities: From a charitable to a commercial footing” submitted as a chapter to the book “*Corporate Sustainability and Responsibility in Tourism*” edited by D. Lund-Durlacher, V. Dinica, D. Reiser, and M. S. Fifka. At the time of submission of the dissertation, the chapter was accepted and the book was in press.

Parts of Paper 2 of this dissertation have been used in a manuscript with the title “Video-aided participant observation for identifying service affordances” to the *Journal of Services Marketing*. At the time of submission of the dissertation, the manuscript was under review at the journal.

The author of this dissertation is the **sole author** of both manuscripts.



# Abstract

The dissertation consists of a preamble and three papers, whose collective aim is to answer the research question “*What factors affect the behavior of tourists participating in an organized inclusive holiday that takes place in a group consisting of persons with and without visual impairment (inclusive holidays)?*” Given their small scale, inclusive holidays have not received much attention in tourism studies, although their extraordinary character allows for re-evaluating many established tourism concepts and theories. The preamble scrutinizes the idea of inclusive holidays through the prism of the development of the concepts of disability as well as recreation and tourism for persons with disability. Based on a critical realist philosophical standpoint, the three papers of the dissertation uncover different aspects of the main research question, namely the motivations for participation in inclusive holidays (*Paper 1*), the experiences of travelers during inclusive holidays in terms of their interaction with the physical and social elements of the service environment (*Paper 2*), and the configurations of antecedents leading to the adoption of inclusive holidays (*Paper 3*). The dissertation identified strong influences of situational factors, trust, and fears in the formation of motivations to join inclusive holidays, it proposed ideas to change the design of holiday elements with the aim of improving the equity of experiences, and it uncovered a multitude of configurations of consumer characteristics and perceived product characteristics that lead to inclusive holidays adoption intention. Each paper includes an enumeration of the limitations of the empirical studies as well as the theoretical and managerial implications of their findings.

**Keywords:** inclusive holidays, disability, visual impairment, motivations, experience, innovation adoption



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# List of abbreviations

**VI** – visual impairment

**PwD** – person with a disability/disabilities, **PwDs** – persons (people) with disabilities

**SG** – sighted guide, **SGs** – sighted guides

**ADA** – Americans with Disabilities Act (1990)

**NGOs** – non-governmental organizations

**QCA** – Qualitative Comparative Analysis, **csQCA** – crisp-set Qualitative Comparative Analysis, **fsQCA** – fuzzy-set Qualitative Comparative Analysis

*Abbreviations used in describing interviewees in Paper 1:*

**F** – female, **M** – male.

*Abbreviations used in denoting variables/conditions in Paper 3:*

**INTER** – product interest,

**PROB** – adoption likelihood,

**INN** – innovativeness,

**ATR** – product category involvement (attraction),

**SOC** – sociability,

**EXP** – relative advantage in terms of experience,

**CTC** – relative advantage in terms of social interaction (contact),

**FRE** – relative advantage in terms of freedom,

**UNC** – product uncertainty.





# Preamble

## BACKGROUND

It is not a very common way to think of “being physically and mentally *able*” as a temporary condition. Not many of us think of disability as something that almost everyone will acquire – either temporarily or permanently – at some point in life (Richards, Pritchard, & Morgan, 2010; UN World Health Organization (WHO), 2011). The phenomenon of aging populations in virtually all the countries around the world (UN Department of Economic and Social Affairs, 2015) means that the number of people with various forms of disability and impairment will be only increasing. Such trend inevitably results in substantial changes in our lives, behaviors and environments, and consequently, – in products and services offered on the market. The travel and hospitality industries are no exceptions here, and so-called accessible tourism offers have been available for several years now. The three studies presented in this dissertation are dealing with a specific form of such travel products – organized tours and holidays that take place in groups consisting of people with and without visual impairment (VI). Throughout this dissertation, the term ‘inclusive holidays’ will be used to denote this form of travel products.

The extent and nature of participation of people with disabilities and impairments (PwDs) in leisure and tourism is intertwined with the developments in the understanding of the concept of disability itself (Francis & Silvers, 2016; Grue, 2016). From the mid-19<sup>th</sup> century, disability was conceptualized within the so-called *medical model* of disability that focuses on the individual medical conditions (impairments and diseases) as reasons for the disability. It calls for (medical) actions to overcome or treat these conditions (Francis & Silvers, 2016; Kastenholz, Eusébio, & Figueiredo, 2015). This approach has kept disability within the realm of healthcare, while recreation for PwDs fell under the domain of therapy (Austin & Lee, 2013). The two World Wars that resulted in a high number of people with physical and mental injuries combined with growing movements for civil and social rights in the 20<sup>th</sup> century brought more attention to the rights of PwDs (Francis &

Silvers, 2016). As a result, more recreational possibilities were created specifically for them (Austin & Lee, 2013). With the emergence of special recreation, 'disabled sports' (the first Paralympic Games took place in 1960 in Rome) and other forms of more active, though still segregated, participation of PwDs in social life, a new understanding of disability has emerged – the so-called *social model*.

The *social model* stipulates a social construction of disability (Small, Darcy, & Packer, 2012) and moves the focus from the 'impaired body' to the barriers constructed by society in the form of physical, political, economic and social environments, which result in the exclusion of PwDs (Bolt, 2005; Bruce, Harrow, & Obolenskaya, 2007). These barriers are identified as reasons for exclusion, and their removal is considered as a way of including PwDs into society and social activities, which also contain recreation. Current scholarly perspectives acknowledge both the medical and the social genesis of disability within the *bio-psycho-social model* (Kastenholz et al., 2015) and also consider cultural processes and structures affecting the creation of disability (Bruce et al., 2007). Disability is perceived as a result of the interrelation between body functions and the environment (Kastenholz et al., 2015). 'Functional limitations' imposed by the environment are seen as situational and distinct from pathology and impairment (Hamraie, 2016). It means that the need for identifying and removing barriers for the sake of inclusion remains exigent, but these barriers should be considered in relation to the abilities of the individuals' bodies. Thus inclusion goes far beyond simple non-discrimination (Austin & Lee, 2013).

Tourism as a social construct also contributes to shaping disability. As argued by Aitchison (2007, p. 77), tourism can "mark" differences between people through "exclusionary identities, places and practices," but it can also "make" a difference in their social inclusion. Currently, the tourism industry is characterized by an abundance of barriers for PwDs: physical access, attitudinal access, lack of information (Eichhorn & Buhalis, 2011; Takeda & Card, 2002) as well as limited sensorial stimuli in recreation programs (Shaw & Veitch, 2011). Researchers in tourism have been investigating these barriers over the past three decades (Bedini & Henderson, 1994; Burnett & Baker, 2001; Chang & Chen, 2011; Ray & Ryder, 2003; Smith, 1987; Turco, Stumbo, & Garncarz, 1998; Yau, McKercher, & Packer, 2004). However, despite the considerable contribution of scholars on the topic of accessible tourism, the coverage of themes in this field of research is rather uneven. Among others, certain forms of disability have been studied less within tourism,



one example being visual impairment (Richards et al., 2010). It is particularly problematic, because traditional tourism research has been un-proportionately focused on visual stimuli and visual perception, while systematically neglecting other forms of sensual experiences (Small et al., 2012). Richards et al. (2010) and Small et al. (2012) explain this imbalance through the dominating position of the concept of the ‘tourist gaze’ (or ‘visual gaze’) in tourism research (Urry & Larsen, 2011). It is also possible that tourism studies inherited ‘*ocularcentrism*’ from other disciplines, such as art studies and art education, which also lack vocabulary for the non-visual (Candlin, 2003), or Western philosophy in general with its distinction between ‘higher’ and ‘lower’ senses (Richards et al., 2010). The most striking anecdotal evidence for tourism’s fascination with the visual is the English word for one of the most common activities in mainstream tourism – sightseeing – with its etymology originating from two vision-related words at once.

Such concurrence of circumstances engendered a situation where offers for persons with VI are not only scarce within the tourism industry in general but also within the offer of accessible tourism services. Few organizations specialize in such products. The majority of these offer guidance and support in organizing and undertaking travel for people with VI by providing trained guides or booking specialized products designed for people with vision problems. Such services belong to the domain of *special recreation*, as they offer participation either physically or symbolically separated from people without VI. There are also organizations that offer travel products for people both with and without VI, thus allowing *inclusive social participation* and benefits to people regardless of their visual abilities. Some of these organizations function as charities, but there are others that offer these services on a commercial basis and use the inclusive aspect of their offer as their unique selling proposition. In other words, people without VI – often called sighted guides (SGs) – and persons with VI pay for their holiday that they can share and experience together in one group. It is precisely this type of travel products and their consumers that are the object of inquiry of the three studies presented in this dissertation.

## **POSITIONING THE DISSERTATION**

Tours and holidays offered in groups of people with and without VI have not received substantial attention in social science research. Konanova (2016) simply listed one of the companies offering such tours as an example of inclusive tourism

offers. Small (2015) provided a deeper elaboration on shared, inclusive tours while discussing *mobilities* and *immobilities* of people with VI and the SGs on a trip in Italy. While not necessarily a tourism product, the activity of sighted guiding in a leisure context has been studied in several works of Macpherson (2009a, 2009b, 2012), where the author explored the perspectives of persons with VI and the SGs as well as the interactions between them. Despite the limited number of publications on the topic, the concept of inclusive tourism in relation to shared travel of people with VI and their peers without VI can be embedded within broader bodies of research, namely those revolving around *accessible tourism*, *inclusive recreation*, and more recently, *peer-to-peer systems*.

Research interest in the participation of PwDs in tourism has emerged in the 1990s and concurred with the adoption of several legislative acts around the world, most notably the *Americans with Disabilities Act (ADA)* of 1990 in the USA, *the Disability Discrimination Act* of 1995 in the United Kingdom and the *United Nations Convention on the Rights of Persons with Disabilities* in 2007. The ADA was the first document of its kind in the world (Austin & Lee, 2013), and it required all organizations in the USA, including private businesses, to offer equal opportunities to PwDs in their products and facilities – a provision that directly covered the tourism industry as well (Card, Cole, & Humphrey, 2006). An increasing number of published tourism studies have followed, and these can be roughly divided into two main groups. The first one comprises studies that deal with the demand side of tourism and explore the needs, motivations, behaviors and experiences of PwDs while traveling (Burnett & Baker, 2001; Chang & Chen, 2011; Darcy, 2010; Hersh, 2016; Kastenholz et al., 2015; Ray & Ryder, 2003; Richards et al., 2010; Small et al., 2012; Yau et al., 2004). The second part includes research contributions that focus on the supply side and evaluate the provision of services to PwDs (Buhalis, Darcy, & Ambrose, 2012; Card et al., 2006; Darcy, Cameron, & Pegg, 2010; Eichhorn, Miller, Michopoulou, & Buhalis, 2008; Goodall, Pottinger, Dixon, & Russell, 2004; Özogul & Baran, 2016). The latter body of research usually discusses a form of tourism known as *barrier-free tourism*, *tourism for all* or more commonly *accessible tourism*.

There is no complete clarity on the conceptualization of accessible tourism. Typically, this term is used to describe the physical and social infrastructure, including products, services and facilities which enable persons with various access requirements to travel and enjoy tourism experiences independently and

with dignity (Darcy et al., 2010; Münch & Ulrich, 2011). Theoretically, this means that PwDs can also engage in tourism activities outside the framework denoted by the term (for example, with the help of a travel companion). Accessible tourism is usually considered as a niche or a special type of tourism by the industry, policymakers (Darcy et al., 2010) and by some researchers as well (Özogul & Baran, 2016). Scholars adhering to the social model of disability call for a more holistic view of accessible tourism and an extension of accessibility to the whole travel industry through means of '*universal design*' (Darcy & Dickson, 2009; Münch & Ulrich, 2011). Such dissonance between the status quo and visions of accessible tourism is very similar to historical developments of the concept of sustainable tourism (Sharpley, 2000). It is also well illustrated by the fact that the chapter on inclusive and accessible tourism written by Münch and Ulrich (2011), which envisages an inclusive society, is found in an edited book on 'holiday niches'.

Shelton and Tucker (2005) have listed the overwhelming emphasis on physical access as one of the failures of tourism regarding the participation of PwDs. Even within this focus, arrangements are often limited to practical considerations, such as wheelchair access or provision of Braille<sup>1</sup> in public spaces. With some exceptions (Daruwalla & Darcy, 2005; Kastenholz et al., 2015), studies on accessible tourism have also predominantly focused on physical access. More insights on the social aspect of the participation of PwDs in tourism can be found in the field of *special and inclusive recreation*. Research on special and later inclusive recreation has been developing parallel to academic tourism since the 1960s (Austin & Lee, 2013), and it has been covering a broader range of leisure activities, including those undertaken close to the place of residence without the need to travel. Such activities are more frequent, they are available to a broader number of people, including those who are less affluent (Shelton & Tucker, 2005), and thus many leisure- and therapeutic recreation scholars have studied them.

*Special recreation* was historically the first form of participation of PwDs in leisure, and it is defined as the segregated activities created and offered exclusively for PwDs (Austin & Lee, 2013). While special recreation still has a place nowadays, recent attempts were made to include PwDs into mainstream recreation. It has been shown that including PwDs into general recreational activities and offering

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<sup>1</sup> A tactile writing system, invented by Louis Braille in 1824, which is used by persons with blindness and visual impairment

more interaction with peers without disability in a leisure context positively affects the quality of their life (Logan et al., 1998), improves health, confidence, creates friendships (Devine & King, 2006), and has many other benefits (Austin & Lee, 2013). Schleien, Green, and Stone (2003) suggested three major approaches for *inclusive participation* of PwDs in recreation programs:

- *integration of existing recreation programs*, which consists in the adaptation of existing recreational activities to the needs of PwDs;
- *reverse mainstreaming*, which indicates the involvement of people without disabilities to activities originally designed for PwDs (i.e., people without disabilities participating in special recreation);
- *zero exclusion*, which denotes activities open to equal participation of all people regardless of their abilities.

According to the authors, the last approach – *zero exclusion* – is the only one, which promotes equal status for all participants, regardless of their physical and intellectual abilities. It can only be achieved by universal design which is defined as the “design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design” (The Center for Universal Design, 1997). On the other end, *integration* (as defined by Schleien et al. (2003)) implies only minimal changes to the product, which often is limited to the removal of legislative, organizational and physical barriers (Vislie, 2003) without making changes to the core product.

The definition of accessible tourism, given by Darcy & Buhalis (2011), stipulates that independent travel of PwDs should be achieved “through the delivery of universally designed tourism products, services and environments” (p. 10). Such definition places accessible tourism within the approach of “*zero exclusion*.” It has to be kept in mind that this definition represents a vision rather than the current situation, as it was discussed in the previous section. For example, Darcy and Pegg (2011) have found that Australian hotel managers perceive accessible accommodation as limited to accessible rooms (referred to as “disabled rooms” by the managers), and have a limited understanding of the accessibility of other hotel facilities. This situation illustrates the *integration with adaptation* approach of inclusive participation (Schleien et al., 2003), which in this case has been influenced by legislative regulation. The development of the “*zero exclusion*”

approach still faces many challenges, including the high costs and ambiguity involved when applying universal design (Law, Yi, Choi, & Jacko, 2007).

*Reverse mainstreaming*, which is also known as *reverse integration*, is not very common in tourism, yet it is more widespread in another leisure context – sports. The most common example is sportsmen without disabilities participating in wheelchair sports, particularly basketball and handball. It has been shown that participation in reverse integrated sport activities increases quality of life measures and perceived social competence of participants with disabilities (Hutzler, Chacham-Guber, & Reiter, 2013) and generates at least a short-term positive effect on the understanding and perception of disability by school-age children who do not have a disability (Evans, Bright, & Brown, 2015). In the tourism context, the most widely known initiative following the idea of reverse integration is the *Dialogue in the Dark* international franchise. In many cities around the world, this organization offers short indoor tours in complete darkness guided by a blind person to people without VI. The tours emulate the experience of blind people in everyday environments – for example in a park, a busy city street, a boat or a bar (Dialogue Social Enterprise GmbH, n.d.). The object of inquiry of the dissertation – inclusive holidays offered in groups of people with and without VI – are another example of reverse integration. Organizations offering such packages range from charities and NGOs to social- and for-profit businesses. Some examples are *Wilderness Inquiry* (US), *Traveleyes* (UK), *Jubilee Sailing Trust* (UK), and *Tour de Sens* (Germany).

While according to Schleien et al. (2003), reverse integration is inferior to zero exclusion in terms of its inclusion potential, it can be argued that former approach has certain advantages. First of all, expanding existing special recreation programs does not require substantial capital investments. Secondly, it avoids the danger of promoting ‘normalcy’ – a criticism of universal and accessible design from the standpoint of critical disability theory (Hamraie, 2016). Instead, such recreational activities enable people with and without a disability to interact and engage with one another, to learn about the experiences of each other. Rather than aiming at assimilating people with different abilities, reverse integrated recreation and tourism build on the diversity of the participants. Finally, this approach foresees a stronger contact between people with and without disabilities, and thus it may have a beneficial effect on the societal attitudes towards disabilities and PwDs (Amsel &

Fichten, 1988; Daruwalla & Darcy, 2005; Maras & Brown, 1996). In other words, it can contribute to the removal of attitudinal barriers to inclusion (Smith, 1987).

Inclusive travel products for people with and without VI are not only based on the idea of reverse integration but also build upon the sharing of 'resources' between the participants of the tour, and thus they follow an approach similar to that of 'collaborative lifestyles' or 'shared economy' (Dredge & Gyimóthy, 2015). The resource shared, in this case, is the time and the sensorial perception of the experience during the trip. Another example of sharing the resource of sensorial perception is a recent mobile app called *Be My Eyes*, which "makes life easier for people with a visual impairment by connecting them with sighted helpers through a smartphone app" (Be My Eyes, n.d.). In case of traveling, sharing perception can enhance the individual's 'sense of place' (Darcy & Dickson, 2009) in the process of sighted guiding, which results in an intercorporeal emergence of the landscape (Macpherson, 2009b). Not only people with VI receive 'visual' guidance from their peers with sight, but the SGs themselves have their experience influenced by the perceptions of the persons they are guiding. It is necessary to mention that such process differs from traditional guiding, as the 'guides' are not professionals or volunteers but fellow travelers and group participations.

The summary of literature above places inclusive travel products for people with and without VI within existing research. It can be concluded that such tours follow the logic of reverse integration in recreational programs, and thus they can also be called reverse-integrated tours. It means that people with and without VI are offered a travel experience based on the infrastructure used for special recreation or accessible tourism. At the same time, reverse-integrated tours use sighted guiding to remove access barriers and to provide an enhancement to the 'sense of place' for participants both with normal and limited vision by sharing the 'resource' of sensorial perception among peers that travel together. Nevertheless, there are many questions that the existence of such inclusive holidays raises. There is no clarity in whether this form of traveling differs significantly from other forms of participation of people with and without VI in tourism. It can also be argued that currently, it is a 'niche within a niche', and therefore it is not obvious whether growth and expansion are possible, and if yes, which people are more likely to choose such products. Finally, there is a lack of understanding of shared experiences that occur during sighted guiding and how they can be 'designed' or facilitated by the service providers. These and other issues and questions guided the development

and implementation of the studies described in the three papers contained in this dissertation.

## **RESEARCH PHILOSOPHY**

The current dissertation has been designed and written within a critical realist research paradigm. This choice corresponds to the worldview of the author that has formed over his development as a researcher. The chosen paradigm also fits with the field of the doctoral program – business and socioeconomic sciences. With its realist ontology (assuming the existence of reality outside of human knowledge and perception), critical realism is applicable to researching phenomena with the aim of finding solutions to issues faced by business entities, industries and the society in general. At the same time, the relativist epistemology of critical realism (stipulating that reality is not directly accessible by humans, but human knowledge can capture part of this reality) acknowledges the complex structures existing in the social world as well as the interconnectedness of a variety of its open systems. The research paradigm and its relevance to the chosen methodologies is discussed separately for each of the three papers contained in the dissertation.

## **SYNOPSIS OF THE THREE PAPERS**

The general research question that the dissertation aimed to answer is the following:

*What factors affect the behavior of tourists participating in an organized inclusive holiday that takes place in a group consisting of persons with and without visual impairment?*

Three papers were designed in order to answer this question, each by addressing more specific research questions. These questions and the relevant rationales for each of the three papers are presented in Table 1.

Table 1. The research questions and rationales of the three papers

	<b>PAPER 1</b>	<b>PAPER 2</b>	<b>PAPER 3</b>
<b>RESEARCH QUESTION</b>	What is the structure of motivations of persons with and without VI in choosing inclusive holidays?	What affordances of the physical and social environments guide the experience of persons with and without VI while participating in an inclusive holiday?	What configurations of antecedents lead to an intention of participating in inclusive holidays among persons with and without VI?
<b>RATIONALE</b>	To understand the motives of participation in inclusive holidays	To describe the experiences of tourists in a meaningful and actionable format for service providers	To describe the potential users of inclusive holidays

*Paper 1* delves into exploring the motivations of persons with and without VI for participating in inclusive holidays. Since such research question has not been explored in previously published research (in English), the design has an exploratory component. Nevertheless, the study is based on a qualitative framework of data collection and data analysis that builds upon existing theories of tourist motivation.

*Paper 2* applies affordance theory, which has received considerable attention in the fields of industrial and interaction design, to describe the experiences of tourists during an inclusive holiday in terms of their interaction with the physical and social environments. The analysis was based on observational data in the form of notes and video recordings during participation in an actual holiday.

*Paper 3* builds upon the findings of Paper 1 and uses these to inform a research design for collecting information about the configurations of antecedents leading to the intention of adopting inclusive holidays. The application of Qualitative Comparative Analysis (QCA) allowed for a consideration of the interactions between these antecedents (i.e. configurations) as well as provided insights for segmentation and targeting of likely adopters.





# **Paper 1. Choosing to Travel Together: Motivations of People with and without Visual Impairment**

## **ABSTRACT**

The paper delves into the motivations of individuals for participating in inclusive holidays that take place in groups comprised of persons with and without visual impairment (VI). While tourist motivations have been extensively covered in the tourism literature, no grand theory has emerged, and inclusive holidays have not been considered. Recent developments in social sciences outside of the tourism domain suggest novel theoretical approaches to tackling behavioral phenomena, including motivation formation. Based on some of these developments, notably the multilevel analysis doctrine, as well as on Gnoth's *Process of Motivation and Expectation Formation*, the author employed critical realist thematic analysis to a data corpus collected through 19 semi-structured interviews, where participants and non-participants of inclusive holidays expressed their thoughts and described their attitudes. The study established interrelationships between motives, values, push factors, situational factors and identified trust and fears as an important component of motivation formation. The roles of the personality, societal factors and the marketing activities of tour organizers have been specified. Apart from providing a theoretical overview of the structure of motivations, the paper provides actionable suggestions to managers involved in the offer of inclusive holidays.

**Keywords:** tourism motivation, inclusive holidays, multilevel analysis doctrine, societal forces, situational factors.

## **1.1. INTRODUCTION**

Why does a sighted person choose to go on holidays where she will be accompanying people with visual impairment (VI) instead of visiting the same

destination independently? Why does a person with severe sight loss agree to be guided by a fellow traveler who has received no special training and has no binding responsibility to assist him, when he could join a tour designed for persons with VI and be guided by professionals? These questions commonly appear to those who hear about inclusive holidays for the first time. Just some decades ago, the onset of mass tourism prompted scholars to address similar questions about travel in general, and the early tourist motivation studies contributed to the emergence of tourism as a field of scientific inquiry. Researching travel motivations helped to differentiate tourism as a distinct phenomenon by framing it within a conceptual base and theories (Moscardo, Dann, & McKercher, 2014, p. 105). It also addressed the need of practitioners to shape their decisions based on a better understanding of the tourists' decision process. As the wide variety of forms of tourism has not facilitated the development of a broadly accepted grand theory of travel motivation, tourism scholars turned their attention to specific forms of traveling.

Motivations for many forms and types of tourism have been studied – heritage tourism (J. S. Chen, 1998), rural tourism (Park & Yoon, 2009), creative tourism (L.-L. Chang, F. Backman, & Chih Huang, 2014), volunteer tourism (Brown, 2005; Lo & Lee, 2011) and many others. Often, such studies aim at “brokering the link” between general travel motivations (Brown, 2005, p. 481) and motivations for engaging in the researched activity. However, it is rather blurry what constitutes “a general form of tourism” in the first place. For the context of motivation research, Moscardo defined a tourist as “someone traveling for leisure/vacation/holiday purposes with a substantial degree of control over the destination they visit and the activities they engage in” (Moscardo et al., 2014, p. 83). While the “substantial degree of control” excludes situations where traveling is involuntary (such as business travel or visiting family and friends for occasions, such as weddings), the part “leisure/vacation/holiday purposes” already refers to a certain level of travel motivation. The question remains whether such definition is suitable as an overarching concept covering ‘general tourism’, and whether ‘general tourism’ is a useful concept at all.

Traditional motivation theories comprise certain needs and motives (Harrill & Potts, 2002). There is little doubt, however, that the same need may be satisfied by different means (Jamal & Lee, 2003). In satisfying certain needs and wants, tourism competes with other forms of leisure (or even other activities). Specialized forms of tourism share many similarities with other life domains, including activities

related to education, sports, entertainment, or even volunteering. In order to prevent ‘*marketing myopia*’ (Levitt, 1960) among tourism service providers, it is important to acknowledge these overlaps and consider the consumption of a specific tourism product from a broad view of choices available to people. One way of doing it is by deriving travel motivations not only from those people that choose to travel but also those that choose not to do it – something that the majority of tourist motivation studies missed (Caldow, 1997; Moscardo et al., 2014).

The current study investigates the reasons for participating in inclusive holidays taking place in groups of persons with and without VI. Such tours are based on sighted guiding – a process when individuals without any significant sight loss accompany persons with VI, assist them to find their way, describe the surroundings and provide companionship. While this product is relatively unknown and can be described as niche, tour operators based predominantly in the United Kingdom have been offering it consistently over the past years. More recently, a social business has started marketing such services on the German-speaking market as well. While the business model of these organizations varies, sighted guides typically get a reduced price for the tour. This arrangement also means that the participants without VI are not volunteers or paid employees but fellow travelers on the same holiday.

In marketing activities directed towards people without VI, inclusive holiday providers differentiate their product from volunteering by emphasizing the enhanced sensorial experience gained through participation (Tour de Sens, n.d.; Traveleyes, n.d.). At the same time, the social benefit is also acknowledged. *Vitalise Holidays* – the early pioneer in offering this type of holidays – referred to its sighted guides as volunteers (“Volunteers needed to help visually impaired and blind people enjoy holidays in the UK, Europe and worldwide,” n.d.). The reduced rate for sighted travelers can also be perceived as a cue that it is offered as a reward for providing assistance. This situation hints to a possible overlap with volunteer tourism and volunteering in general, at least from the perspective of participants without VI. In the study, the extent of this overlap has been assessed by identifying the motivations of tour participants and contrasting them to those reported for volunteers and volunteer tourists.

To answer the research question of the study – “*What is the structure of motivations of persons with and without VI in choosing inclusive holidays?*” –

interviews with both participants and non-participants of inclusive tours (including persons with and without VI) were collected and analyzed through thematic analysis. While grounded in existing tourist motivation theories, the analysis followed the doctrine of multilevel analysis and assumed the entwinement of psychological and sociological factors that affect human behavior. To maintain a holistic perspective of motivations and consumer choices, accounts of non-participants were considered and used to establish the uniqueness of motivations for inclusive holidays. Given the peculiarity of inclusive holidays in having two distinct groups of customers, persons with and without VI, the motivations of each were considered separately. Since the persons from each group interact, and the success of the holidays depends on the quality of this interaction, overlaps in the motivations were also identified.

The paper continues with a summary of the research background that served as the theoretical framework of the study. It was not an objective to offer a comprehensive overview of the conceptual development of tourist motivation over the years (among others, Huang and Hsu (2009) provided a review on this theme). Instead, the paper looks into ways of how developments outside of tourism studies may support the integration of the currently fragmented travel motivation theories. This theoretical summary is complemented by a review of findings from studies tangent to the research question – the general participation of persons with disability (PwDs) and people with VI in tourism as well as the motivations of volunteers and volunteer tourists. After discussing the methodology employed in the study, the findings are presented and discussed in detail. They not only shed light on a currently under-researched topic, but also present significant managerial implications. They establish a base for more informed marketing decisions to the organizations providing inclusive services – typically charities or social businesses without the necessary resources for market research. The limitations of the research as well as the conclusions close the paper.

## **1.2. THEORETICAL FRAMEWORK**

### **1.2.1 Tourist motivation**

Tourist- or travel motivation has been widely studied in tourism literature since the 1960s. According to Gnoth (1997), models stemming from traditional consumer behavior were failing in explaining tourist behavior, given the “irrationality underlying hedonic or emotionally driven behavior” characterizing leisure travel

(p. 285). As a result, tourism-specific models have been suggested. The first attempts have appeared within the boundaries of well-established disciplines, most notably psychology and sociology (Jamal & Lee, 2003). The rapid development of tourism studies has resulted in a multitude of competing motivation theories, often opposing one another even within the same discipline (Harrill & Potts, 2002). The earliest approaches consisted in descriptive typologies of travelers, such as those proposed by Cohen (1979) and Plog (1974). These were followed by attempts to offer explanatory models of travel behavior both within sociology and social psychology (Harrill & Potts, 2002).

More recently, it has been proposed to integrate the contributions of the various disciplines on travel motivation. Notably, Jamal and Lee (2003) observed a significant gap between the psychological and sociological descriptions of tourist motivation and argued that an integration of approaches would result in a more robust theory. There have been voices within social psychology itself campaigning for acquiring a “sociological imagination”, which could lead to stronger explanatory power of psychological models (Oishi, Kesebir, & Snyder, 2009). Such calls are worthy of being considered, given that a social psychological approach has been dominating in existing tourism motivation models (Harrill & Potts, 2002). An interdisciplinary approach is becoming particularly useful in light of the recent addition of another discipline to tourism motivation research – neuroscience (Pearce & Packer, 2013).

A structure for an interdisciplinary approach to studying human behavior was suggested by Cacioppo and Berntson (1992) under the name *multilevel analysis doctrine*. This doctrine stipulates that (1) phenomena are determined at multiple *levels of organization*, (2) that properties of the collective cannot always be predicted from the properties of the parts until the properties of the whole have been studied across levels (principle of non-additive determinism), and (3) that there are mutual influences across the different levels of organization (principle of reciprocal determinism) (Cacioppo & Berntson, 1992; Oishi et al., 2009). The number of levels of organization can vary, but it is possible to look at human behavior at the atomic, molecular, physiological (biological), psychological and social structural levels (Bandura, 2006).

The principle of non-additive determinism, akin to non-reductionism, postulates that emergent properties at a group-level (whether it is a group of molecules, a

group of physical organs, or a group of individuals) cannot be reduced and explained solely by the attributes of individual elements. Rather, group-level properties emerge as a result of the interaction of the constituting elements (Bandura, 2006; Oishi et al., 2009). This theory implies that just as physics cannot comprehensively explain human motivation without psychology, psychology on its own cannot fully explain it without considering social structures. That does not contradict the observation that social structures are created and changed by individuals who have their own motivations and behavior, – which is reflected by the principle of reciprocal determinism. According to this principle, influences can happen both upwards and downwards across various levels.

The doctrine of multilevel analysis may explain the disagreements on travel motivation across different disciplines. It is plausible to conclude that existing theories do not necessarily oppose each other but rather explain travel motivation at various levels of organization from the limited perspective that one level can provide. For example, despite a relative consensus on a ‘push-pull’ dichotomy of factors causing travel, there has been less agreement on what these factors are. While most researchers attribute only psychological processes to ‘push’ factors, Dann (1977) listed ‘anomie’, a sociological concept, as one of them. Arguably, ‘pushing’ can happen at various levels, but that does not preclude the factors at different levels influencing each other. In their attempt in offering an interdisciplinary theory of tourist motivation, Jamal and Lee (2003) hinted at these influences when noting that consumption of tourism is driven by human needs and desires as well as by marketing intermediaries. The latter entities form part of a system which has been socially constructed by individuals “to fit their desires” (Bandura, 2006).

One assumption that most theories of tourist motivation make is that of human agency. Moscardo’s definition, mentioned earlier, emphasizes this by attributing “a substantial degree of control” to the tourist. The assumption of human agency means that humans form intentions, set goals, anticipate likely outcomes of actions, exert purposeful behavior, make choices, and reflect on them (Bandura, 2006). Without the assumption of human agency, human behavior is seen as unconscious or as a result of environmental circumstances, and thus the notion of motivation becomes obsolete. According to Bandura (2006), human agency has three modes – individual-, proxy- and collective agency. Apart from individual agency, which involves humans exerting influence directly to achieve certain goals, exercising

agency can be socially mediated by influential others. One example of proxy agency is the influence of children, family members, partners, friends on the travel plans of individuals. Another one is the use of tourism intermediaries to acquire services that can satisfy the needs of the individual. Finally, collective agency emerges when a group of individuals unites their power to attain a goal. It can be illustrated by organized group travel, when the satisfaction with the trip lies in the collective behavior of all group participants.

On a macro scale, the combination of individual interests and goals results in societal trends and fashion, such as the increased demand in ecotourism (Lindberg & McKercher, 1997), the rejection of traditional mass tourism (Butler, 1990) or simply the boost in visitation of certain destinations induced by films or TV series, such as the case of “Game of Thrones” and the Croatian Dubrovnik (Tkalec, Zilic, & Recher, 2017). Cultural differences, according to Bandura (2006), are explained by the relative weight given to individual-, proxy- and collective agency which varies across cultures and spheres of life (p. 174). The idea of the three modes of human agency is useful when considering tourism motivation because it extends the process of decision making beyond personal matters of an individual and connects psychological concepts (individual agency, proxy agency) with sociological ones (collective agency).

The social cognitive theory that stipulates the modes of human agency acknowledges that a substantial part of human behavior depends not only on the actions of the individual but also on ‘*fortuity*’ (Bandura, 2006). Fortuity denotes the life circumstances, beyond the control of an individual, that introduce a probabilistic and undeterministic aspect of human behavior (ibid, p. 166). In terms of tourist motivation, fortuity is comprised of so-called objective or situational factors that can affect travel decisions, such as an unexpected pay raise, the loss of job, an opportunity of free or discounted travel. Tourist motivation theories and studies frequently overlooked or ignored the influences of objective factors. They appeared more commonly in studies dealing with constraints that limit tourist behavior (Fredman & Heberlein, 2005; Hudson & Gilbert, 2000; Tian, Crompton, & Witt, 1996).

In 1997, Gnoth published a paper, where he introduced the *Process of Motivation and Expectation Formation*. The scholar developed it through a thorough analysis of published (to the date of the article) literature. Although the Process was not

based on empirical evidence directly, it provided a framework that considers motivation as a continuous process occurring at various levels and acknowledges objective factors, or so to say fortuity. According to the Process, motivations result in the combination of motives, values, and situations. *Motives* are described as psychogenic abstract constructs, like needs. Motives are operationalized through *values*, which can be biogenic, such as those related to the need of food or shelter, or sociogenic, or those that are learned as social norms and conventions. They can also be outer-directed – cognition-dominant – and thus targeting specific objects (in the case of tourism, specific products, destinations or experiences) or inner-directed – emotion-dominant – and aimed at reducing drives. Values direct motives into their satisfaction in an existing situation of objective factors. The motive–situation interaction guided by values becomes a *motivation*, an observable and objectively measurable construct.

In his Process, Gnoth offered an interdisciplinary approach to motivation that combines several theories – cognitivist psychological, behaviorist and sociological. The incorporation of sociogenic values means that the framework foresees that factors in the individual's outer environment, over the history of interactions, can be internalized as a psychological factor, thus reflecting the multilevel analysis doctrine. As its names suggests, the Process considers motivations as dynamic phenomena connected to *expectations* and subsequently *satisfaction*. Expectations – the tentative representations of future events – just as values, can be cognition- or emotion-dominant (Gnoth, 1997, p. 289). Overall satisfaction, according to the author, is more closely related to emotion-dominant, or inner-directed, expectations and values.

The distinction between motives as abstract “energizers of behavior” and motivations that emerge in a given situation provides a rather intuitive interpretation of the framework. According to its author, *motivations* play a more important role for marketers as they tie individuals to particular products, whereas the same *motive* can be satisfied by a variety of products, depending on the *values* of the individual and the current *situational factors*. The observable motivations are not understood as reasons for behavior but rather as its description (Gnoth, 1997, p. 293). Understanding tourism motivation as a complex process occurring at various levels, rather than a list of common motivations, has a better potential for developing effective marketing strategies and programs.



### 1.2.2 Travel motivation of persons with disability

The travel behavior of PwDs has been studied by various researchers in the past three decades. The majority of these studies refer to the travel participation of persons with mobility impairments either explicitly or by developing research findings based on samples where mobility impairments are prevailing. Few studies have focused on the travel behavior of persons with VI (Hersh, 2016; Richards et al., 2010; Small et al., 2012). Unlike research on general travel behavior, studies on travel participation of PwDs have been dominated by explorations of the constraints and barriers to travel (Yau et al., 2004), rather than motivations. This can be explained by the dominance of the social model of disability as an underlying theoretical assumption, often expressed explicitly by researchers. According to the social model, disability is the result of the environments generated by the society rather than of the individual impairments. In other words, the society has created barriers or constraints for some of its members, which attract scientific interest. The importance of barriers in hindering tourism participation is often illustrated by the smaller rate of travel by PwDs compared to populations without disabilities (Aitchison, 2007; Darcy, 1998, as cited in Yau et al., 2004).

Numerous researchers concluded that PwDs share the same primary motives, reasons and priorities for traveling as their peers without disabilities (Aitchison, 2007; Kastenholz et al., 2015; Münch & Ulrich, 2011). Empirical studies support this observation. In a survey of the Portuguese population of PwDs, Kastenholz et al. (2015) found that the main travel motivations were to increase knowledge and capabilities, enjoyable moments for increased quality of life as well as inclusion in society. Qualitative studies by Blichfeldt and Nicolaisen (2011) as well as Shi, Cole, and Chancellor (2012) discovered that escape from the everyday environment, relaxation, exploration, and definition of self were the main motives for traveling. The second group of authors also noted enhancement of family relationships and social interaction as additional factors. These findings correspond well with the 'push' motivations of Crompton (1979) that were developed for general leisure travelers.

The main distinctions between persons with and without disabilities are attributed to the 'pull' factors and subjective/objective situational factors. The physical accessibility of a destination is shown as a critical factor for PwDs when traveling (Blichfeldt & Nicolaisen, 2011; Kastenholz et al., 2015). Burnett and Baker (2001) found that the importance of characteristics of the destination's environment, as

well as its accessibility, in decision making increases with the severity of the mobility impairment. Situational factors are usually presented as constraints and include illness, lack of money (Shaw & Coles, 2004), lack of traveling and assisting companions (Blichfeldt & Nicolaisen, 2011). A study by Lee, Agarwal, and Kim (2012), however, has shown that environmental constraints, such as physical conditions and facilities of a destination, do not affect travel intention directly. Yau et al. (2004) questioned whether the assumption that elimination of barriers would lead to an increase in travel participation of PwDs. The authors suggested that decisions to travel are intertwined with personal development, where “tourism represents a metaphor for recovery” (ibid, 958).

Shi et al. (2012) concluded that some ‘push’ factors for traveling may also be distinct for PwDs. Specifically, the authors identified “independence,” “desire of being in natural environment,” “adventure spirit”, and “do it today” as factors which are unique to travelers with acquired mobility impairments. The survey by Kastenholz et al. (2015) also indicated that Portuguese PwDs desire trips other than they usually undertake – such as trips in the mountains or thermal spas. Such findings suggest that PwDs may indeed have distinct motivations to travel from the rest of the population, and the social model on its own might not be sufficient to frame their travel behavior. One potential explanation is the influence of the physical/bodily impairment on the motives and behavior of an individual. Another one is the influence of the social and cultural environments imposed on the individual that in turn affect his or her inner motives. These explanations fit the so-called bio-psycho-social model of disability that recognizes disability as an interrelation of the body and the sociocultural environment (Kastenholz et al., 2015).

Considering PwDs as a homogenous group of tourist or as one segment is an oversimplification (Blichfeldt & Nicolaisen, 2011; Burnett & Baker, 2001). They comprise people of different age, gender, ethnicity, and socioeconomic status (Burns, Paterson, & Watson, 2009). Most importantly, their individual interests may have more in common with those of persons without disabilities than of other PwDs (Candlin, 2003). It is, however, plausible that a particular type of impairment or a given level of its severity influences the individual’s consumer behavior. Richards et al. (2010) reported that persons with VI perceive the same benefits of traveling as sighted people, including social interaction, relaxation, experiencing different environments. Small et al. (2012) noted that fear and anxiety as well as lack of confidence are factors that affect the decision of persons with VI to travel. Overall,

studies that focus on the travel behavior of people with VI remain scarce (Small et al., 2012).

### 1.2.3 Motivations for volunteering and volunteer tourism

Volunteering as an act of making sacrifices for strangers has long been an interest for social scientists. Motivations for these acts have been particularly intriguing because they are seen as triggers or processes that move people to action (Clary, Snyder, & Ridge, 1998). Yeung (2004) credits the *American Volunteer Functions Inventory*, developed by Clary et al. (1998), as a basis for further quantitative explorations of volunteer motivations. This survey tool includes six motive factors conceptualized as functions. The functional approach means that similar acts of volunteerism reflect different functions: *values* (related to altruistic and humanitarian concerns), *understanding* (gaining new knowledge and skills), *social function* (to be with one's friends), *career* (benefiting one's career development), *protective function* (protecting the ego from negative features of the self; reducing the guilt over being fortunate) and *enhancement* function (growth and development of the ego) (Clary et al., 1998). Yeung (2004) studied motivations of volunteers engaging in social service activities by following a phenomenological framework. She summarized her findings in an octagon model with four interactive dimensions – getting–giving, continuity–newness, distance–proximity, and thought–action. The researcher concluded that four motivational poles – action, proximity, newness and giving – are outer-directed, while the other four – getting, continuity, distance and thought – are oriented inwards.

Similar motivational factors have been found for volunteer tourists – people that combine traditional elements of travel with voluntary service at their destination (Wearing & McGehee, 2013). These factors typically revolve around the dichotomy of altruism *versus* self-interest (Brown, 2005; Wearing & McGehee, 2013). While this dichotomy is very similar to findings of studies on volunteerism in general, there seem to be varying magnitudes of importance of the two motives not only between volunteers and volunteer tourists but also between different types of volunteer tourists. Commonly, volunteer tourists have been divided into “volunteer-minded” and “vacation-minded” (Brown, 2005). Another differentiation suggests that “shallow” volunteer tourists are extrinsically motivated, they are sensation-seekers and thus driven by self-interest, while “deep” volunteer tourists are altruistic and think more about the community (Wearing & McGehee, 2013). More specifically, motivational factors that have been found to lead to volunteer tourism include social

motivation, such as meeting new friends or bonding with family and existing friends, cultural immersion and interaction with local people at a destination, learning and experiencing something new, enhancing one's career opportunities, sharing one's core values, boosting one's self-esteem as well as doing something meaningful and giving back (Brown, 2005; Lo & Lee, 2011; Wearing & McGehee, 2013). While research on volunteer tourism provided inventories on motivations that can be compared to those developed for volunteerism or other forms of tourism, there has been a dearth of publications focusing on the structures, complexities or processes behind the formation of volunteer tourism motivation.

## **1.3 METHODOLOGY**

### **1.3.1 Research paradigm and research design**

The current study is based on a critical realist ontology. The author assumes that the world is structured, differentiated, stratified and changing (Danermark, Ekstrom, Jakobsen, & Karlsson, 2001). Most importantly, the author acknowledges that reality has several levels. While the *real level*, where causal mechanisms take place, may not be accessible to the researcher directly (Fletcher, 2017), causal mechanisms manifest themselves through events and experiences in the *actual* and *empirical* levels respectively (Danermark et al., 2001). These events are conceptually mediated, they are filtered through human experiences and interpretation (Danermark et al., 2001; Fletcher, 2017), but their exploration through human experiences provides an opportunity for identifying underlying causal mechanisms through abduction and retroduction (Fletcher, 2017).

A critical realist stance condones the use of existing theories for guiding the research (Fletcher, 2017). The current study uses theory as a starting point for tackling the research question. Earlier in the paper, contemporary views on tourist motivation in general as well as travel motivation of PwDs and volunteer tourists in particular were summarized and scrutinized. While not explicitly, many of the tourist motivation theories described are based on critical realist worldviews, as they provide generalizable claims of causal mechanisms (Danermark et al., 2001). Some of these theories have guided the collection and analysis of data for this study, but only as initial theories that can be supported or denied by the findings of the process of retroduction (Fletcher, 2017).

The research design of the study builds around intensive data collection in the form of semi-structured telephone interviews with people with and without VI who participated, expressed a wish to participate, or chose not to participate in inclusive holidays, and the subsequent analysis of this data through thematic analysis. The choice of an intensive research design had two reasons. First, the small scale of inclusive holidays for persons with and without VI made it difficult to target a high number of cases. Second, according to Danermark et al. (2001), intensive research designs are more appropriate for studying causal mechanisms. Thematic analysis was chosen as the data analysis method due to its paradigmatic flexibility and its compatibility with critical realist ontology (Braun & Clarke, 2006). It allows identifying patterns in the collected data by introducing theory into the coding process without it limiting the analysis.

### 1.3.2 Data collection

The intensive data collection consisted in conducting interviews with chosen informants. The sample of interview participants was selected based on the purposes of the study. The base of the sample was comprised of persons that have already participated in an inclusive holiday in a group of travelers with and without VI. Recruitment of interviewees took place via different channels. First, three organizations offering inclusive holidays that were identified through an Internet search (one based in the UK, one – in Germany, one – in the USA) were contacted and agreed to distribute a call for participation in a research study among their former customers. Interview participants, recruited through this channel were also asked to share the call with their contacts that have participated in inclusive holidays. Second, the author has collected consent to be contacted for research purposes from a number of participants of an inclusive tour organized by one of the companies, where the author took part as a sighted guide. Third, online forums were used to identify users that have mentioned inclusive travel packages in their contributions. Such users were also contacted with a request to participate in the study.

As inclusive holidays are not a widespread phenomenon and the majority of people may not know about them, finding interviewees that were aware of this form of traveling but chose not to engage was rather difficult. As a solution, former tour participants that had been recruited for an interview were asked to recommend their acquaintances that have not participated in an inclusive holiday or preferred not to participate by choice. It was plausible to assume that these recommended

persons would be already aware of inclusive holidays and would have a formed attitude towards them. The sample of informants was not intended to be representative of any specific population. In fact, in line with the merits of intensive data collection, the sample included a variety of cases, including critical and normal cases (Danermark et al., 2001). While the recruiting process did not make it possible to choose informants by specific characteristics, the different channels allowed reaching a variety of cases. The process was designed in a way that the participants did not have to provide their real name to the researcher in order to maintain anonymity. A total of 19 interviews were conducted with individuals. The list of interviewees with some basic demographic information is presented in Table 2, where the names of the individuals were changed to protect their anonymity.

Table 2. List of interviewees with selected demographic information

<b>Name (changed)</b>	<b>Gender</b>	<b>VI and/or disability</b>	<b>Relationship status</b>	<b>Country of residence</b>	<b>Participation in inclusive holidays</b>
Franziska	Female	VI	Married	Germany	Yes
Stefan	Male	VI	Single	Germany	Yes
Alan	Male	No	Single	UK	Yes
Natalie	Female	No	Married	UK	Yes
Olivia	Female	No	Widowed	UK	Yes
Johanna	Female	No	Partnered	Germany	Yes
Sophia	Female	No	N/A	UK	Yes
Amber	Female	No	Single	UK	Yes
Martha	Female	No	N/A	USA	No
Jimmy	Male	No; other disability	N/A	USA	Yes
Patrick	Male	No	Married	USA	Yes
Nick	Male	No; other disability	N/A	USA	Yes
Aderyn	Female	VI	Single	UK	Yes
Marc	Male	VI; other disability	Single	UK	No
Evelyn	Female	No	Single	UK	Yes
Erin	Female	No	Single	UK	Yes
Molly	Female	VI	Single	UK	Yes
Harriett	Female	VI	Partnered	UK	Yes
Jeremy	Male	VI	N/A	UK	No

As the recruited informants were based in several locations around the globe, face-to-face interviews were unfeasible. Telephone was chosen as an alternative that makes it possible to address a geographically dispersed group of research

participants. Empirical research has shown that data quality between qualitative face-to-face and telephone interviews is comparable (Block & Erskine, 2012; Novick, 2008). Nevertheless, telephone interviewing has its limitations, which have to be acknowledged: they may lead to shorter interviews resulting in less data depth (Irvine, 2011), and there is a lack of control of distractions in the interviewee's environment (Novick, 2008). Furthermore, telephone interviews are characterized by the same limitations as other interview modes, such as the impact of the researcher on the participant and the interpretation of the information provided (Creswell, 2014).

The author conducted the interviews personally, in English. The semi-structured interviews were based on an interview guide (Bernard, 2013), which was flexible to accommodate the status of the interviewees – whether they had previous experience with inclusive holidays or not. Among others, the questions explored the travel preferences and past travel behavior of the informant, the number of inclusive holidays that the participant joined, reasons for choosing this type of leisure or choosing not to engage, expectations prior the trip, memorable positive and negative experiences during the trip, evaluations and reflections after the trip, intentions of repeating the experiences as well as some general questions on demographics. Questions from the interview guides are presented in Appendix 1. The semi-structured format of the interviews also allowed for probing that stimulated the respondents to provide more information (Bernard, 2013). The interviews lasted between 30 and 90 minutes. They interviews were audio-recorded upon a consent from the respondents and transcribed verbatim.

### 1.3.3 Data analysis

The transcribed interviews served as the data corpus for the subsequent analysis. The analysis itself followed a critical realist framework, which investigated the motivations for participating in inclusive holidays by 1) identifying demi-regularities in the data corpus; 2) abduction; and 3) retroduction (Fletcher, 2017). For these purposes, thematic analysis was applied as a method, which Braun and Clarke (2006) have described as “essentially independent of theory and epistemology” (p. 78), thus being applicable to a critical realist framework as well. Thematic analysis is used for “identifying, analyzing, and reporting patterns (themes) within data” (Braun & Clarke, 2006). As such, it can be used for identifying trends, or so-called demi-regularities, in the data.

Thematic analysis is a flexible method, employed in a variety of contexts. In the current study, the guidelines by Braun and Clarke (2006) were followed. Thus, the analysis commenced with the researcher getting familiar with the data corpus by reading it numerous times. Next, the author conducted the coding of data items by using the *Dedoose* web application for qualitative research (“Dedoose Version 8.0.35, web application for managing, analyzing, and presenting qualitative and mixed method research data,” 2019). Similarly to Fletcher (2017), a “directed” coding was employed. It included codes from the literature as well as open codes, emerged from data immersion (Marshall & Rossman, 2006). The advantage of such coding approach is that it does not try to ‘fit’ the collected data into a single theory, yet it acknowledges the merits of existing models.

Following the coding process, the codes were reviewed and grouped into themes. Main- and sub-themes were identified as well as tentative relationships between them. The themes were reviewed for their internal homogeneity and external heterogeneity (Braun & Clarke, 2006). In other words, the coherence of all data items belonging to a single theme was checked as well as the distinction between data items corresponding to different themes. This process resulted in the identification of patterns or demi-regularities existing in the data. As the data was purely based on the narratives of individuals, these explanations of reality were treated as fallible. Nevertheless, the critical realist ontology assumes that observations in the empirical levels are directly linked to causal mechanisms. Abduction helps in approximating these mechanisms.

Abductive reasoning means “the reinterpretation and recontextualization of individual phenomena within a conceptual framework or a set of ideas” (Eastwood, Jalaludin, & Kemp, 2014, p. 8). In other words, the demi-regularities identified previously (the themes and their relationships) were interpreted via existing theories. Finally, the contextual conditions that enable causal effects were searched through retroduction. Retroduction takes place by a constant movement between empirical and deeper levels of reality (Fletcher, 2017) to identify structures that tend to produce an outcome (Eastwood et al., 2014). In the case of this study, the outcome was the participation in inclusive holidays. Therefore, comparisons among participants and non-participants were crucial at this stage. Furthermore, comparisons between persons with and without VI were made in order to check for differences.



## 1.4 FINDINGS

### 1.4.1 Themes and patterns

The themes and subthemes that resulted from the thematic analysis are presented visually in Appendix 2. They are discussed in detail in the subsections below.

***The ‘pushes’ and the ‘pulls’.*** The distinction between the so-called ‘push’ and ‘pull’ factors motivating travel was observable in the collected interviews. The inner reasons that respondents mentioned as drivers for their decision to participate in inclusive holidays were those commonly found in tourist motivation literature – to relax, to explore, and to learn something new. No differences between persons with and without VI were observed here. Many of the respondents also indicated their desire to meet new people on the trip. Within this general motive of expanding one’s social environment, certain subthemes were also identified. For example, Aderyn (F, VI) considered the social aspect of the holidays in terms of *“making friends, finding people within the group that you got on with, [...] making friends that you are still friends after”*, thus implying a desire for building long-lasting relationships. While many of the participants without VI also reflected on creating friendships during their holiday experiences, none has mentioned it as a motive for choosing inclusive holidays.

Participants both with and without VI, however, noted their interest in meeting and interacting with like-minded people during the holidays. Erin (F, sighted) mentioned that she hoped *“that it would be interesting to meet a whole group of other people, who were also in the same position [of being a sighted guide]”*, while Harriett (F, VI) believed that inclusive holidays are good *“to try out new activities with people who have shared interests [...], an opportunity to socialize with people whom you wouldn’t otherwise meet”*. Meeting people with a shared interest was a factor particularly associated with themed holidays, such as ones related to watersports or walking, which echoes some of the motives for engaging in special interest tourism. This motive may be embedded within the deeper need for belonging, especially when the current living conditions (living in a small town, for example) or lifestyle (extended working hours) do not allow communicating with like-minded peers in the location of residence.

Another motive expressed by participants regardless of their visual abilities was curiosity, which appeared in different aspects depending on the individual.

Franziska (F), having a visual impairment herself, was curious *“why would sighted people be interested in anything different [inclusive holidays]”*. Johanna (F, sighted) expressed a similar curiosity but related to persons with VI: *“I wanted to see, to get more experience, to see how different it can be [for people with varying levels of VI to travel]”*. In contrast, Martha (F, sighted), who has not yet participated in an inclusive holiday, was more curious about her own participation in a new experience: *“I would like to see, if I enjoy [...] doing the trip with someone, with people who have visual impairments, [...] to test the waters to see, if it does work out well”*.

While “helping” as a guiding factor in choosing inclusive holidays was expressed by almost all participants without VI, the role it played in the decision process differed. For some travelers, helping was the prime motive for participation. Amber (F, sighted), who has been actively looking for volunteering possibilities in her community before joining an inclusive holiday group, explained:

*I think I had searched the term... in the UK we call it ‘sighted guide’, so accompanying someone with a visual impairment for a holiday. And I wanted to know what that meant. So I think I searched for the term ‘sighted guide’ and then it came up with companies that organize these holidays.*

Johanna (F, sighted) also emphasized the importance of the desire of helping, when she reiterated many times that she likes to be helpful, even when referring to her motivation in agreeing for the interview: *“I like to be helpful. This is research, and I like to be helpful, because this might help for something. And it’s good”*.

While the ‘push’ factors (or inner motives) provided the susceptible grounds, the interviewees were quite explicit that the reasons that actually led to the decision of booking an inclusive holiday were those that are commonly referred to in tourism literature as ‘pull’ factors. Among these, the destination of the holiday was the most prominent. Many of the interview participants expressed that they *“always wanted to visit”* the specific destination. As Franziska (F, VI) put it:

*It was more about the destination, to put it more clearly. We didn’t really think about whether it would be good or bad to be with sighted guides as well. So we just hoped to enjoy the holiday as a whole.*

Some participants praised the tour organizers for offering interesting destinations for holidays and highlighted it as an advantage to many other mainstream tour operators. The existence of organized guided tours and other activities in the program of the holidays was also mentioned as an important factor attracting the interviewees.

All respondents with VI noted the critical role of the fact that the format of inclusive holidays offers the support needed when traveling without sight. In this, inclusive holidays were clearly advantageous compared to any other mainstream packages. According to Molly (F, VI), the sighted participants are essential in such holidays by their ability *“to describe things to you [a traveler with VI] and to help you know where you are and what you’re enjoying”*. Several of the interviewees without VI noted the process of sighted guiding embedded in inclusive holidays as an advantage for them as well. As the majority of interviewees took part in multiple inclusive holidays, it was difficult to distinguish whether the perception of this benefit came before or after participation. At the same time, Martha (F, sighted), who had not participated in any inclusive holidays, believed that *“the experience of describing what I see will make it a better experience for me. I will be paying more attention”*. *“It’s not just altruism, I’m hoping that I will actually have a better travel experience”*, she specified.

As some inclusive holiday organizers offer a discounted price for participants without VI, interviewees without VI indicated (often uncomfortably) that the lower price compared to mainstream tour operators was an important consideration in their choice. Johanna (F, sighted), however, made the price comparison between inclusive holidays and individually organized travel, saying, *“For the money, I would have gone on my own – to go with the group is more expensive than going on my own”*. Interviewees who participated in inclusive holidays with the same organizer multiple times also indicated the influence of other participants of previous tours influencing their decision: *“I’ve made friends on the first holiday and we’d kept in contact. And then they’d told me which holidays they were going to do, and I joined them in another one”* (Amber, F, sighted).

***Freedom through restraint.*** Not all the themes identified through the analysis could be easily designated as ‘push’ or ‘pull’ factors. It was established in the previous section that inclusive holidays offer support that persons with VI need when traveling. This support also translated into a perception of freedom

associated with this type of holidays: *"I've [...] got the knowledge now that if I fancy to go on holiday, and they [inclusive holiday organizers] go somewhere where I want to go, then I can go, I don't have to worry to find somebody that wants to go there"* (Aderyn, F, VI). Stefan (M, VI) also mentioned that since he discovered inclusive holidays, he started traveling more often – something that he could not do in his younger years due to the missing support. Freedom was also present for persons without VI. For example, when referring to the impact of inclusive holidays, Natalie (F, sighted) said, *"I can afford to have a holiday by myself as well as a holiday with my husband, because I have enough time"*. For some participants – both those with and without VI – freedom was perceived as the ability of traveling without the limitations imposed by social structures, such as family.

Besides freedom, the interviewees also reflected on the restraint related to traveling in inclusive holidays. While the fact that inclusive holidays come with organized activities and save customers from the planning hassle, participants also acknowledged the associated limitations. Lack of free time and free choice, the necessity to follow schedules, pre-assigned meal times and meal options were among the complaints in this direction. Issues related to the collective agency that emerges during sighted guiding were only mentioned by participants without VI. Olivia (F, sighted) expressed it in the following: *"I can't just walk away when I'm with a visually impaired group, I can't just say I'm going so and so, I can't just walk away, I have to be more aware of the other people in the group"*. She also quickly added that this situation nevertheless does not bother her. Sophia (F, sighted) referred to a payoff when considering the benefits brought by sighted guiding: *"On one level it [sighted guiding] is more limiting and on another level, it's actually, it deepens the experience"*.

Although participants with VI should experience similar limitations when being guided, they did not mention it is a problem. It may be due to the fact that persons with VI are more experienced in sharing agency while being guided in non-travel domains of life, while for the vast majority of persons without VI, inclusive holidays had been the only circumstance when such situation occurred. Former holiday participants also remarked the issues of collective agency in terms of the group dynamics contributing to the success of each holiday, however, these were not directly relatable to motivations for participation.

**A social substitute.** Since inclusive holidays are group holidays, it was not surprising that most of the interviewees expressed a preference to travel with company rather than on their own. As it was mentioned above, some of the interviewees chose inclusive holidays to meet new people or to have an opportunity to travel with someone other than family. Some others, however, turned to inclusive holidays as a result of life circumstances – or fortuity – that deprived the individuals from their usual travel mates. Some of the mentioned circumstances were a move to a different city and losing existing social contacts, becoming a widow, the partner not being interested in travel in general or to a specific destination. As Molly (F, VI) put it rather bluntly, if she had a friend traveling with her, she would not choose an organized inclusive holiday. She explained her usual procedure in the following way:

*So I kinda know they [inclusive travel organizers] are there, so I check with my friends first, if anyone wants to go on a holiday. If no one wants, then I know that they are there and I can go on holiday with them.*

**Values.** Much of the narratives of the interviewees could be interpreted as descriptions of their values that guide their decisions, including those related to choosing an inclusive holiday. The motive to help as a primary reason was already mentioned earlier. For most of the participants, however, the desire to be helpful was rather a secondary consideration. Many participants without VI expressed their feeling of responsibility to enable persons with VI to travel: *“I just believe in the importance of someone with a visual impairment being as independent as possible”* (Evelyn, F, sighted). At the same time, choosing an inclusive holiday rather than another alternative was seen as compromise between personal travel motives and personal values. As Erin (F, sighted) put it, *“it [an inclusive holiday] sounded like something useful to do with the holiday, not just going and sitting on a beach or that sort of thing”*. Natalie (F, sighted) noted that choosing an inclusive holiday *“just felt a little bit less self-indulgent [...] than another holiday”*. These comments hinted towards the desire of “protecting the ego from negative features of the self” that has been found in studies of volunteers as well (Clary et al., 1998).

Helping and enabling was not the only influential factor. For some of the respondents, inclusive holidays were an alternative to mass tourism that they detested. For Patrick (M, sighted), joining an inclusive holiday was far superior to his acquaintances *“that go to Hawaii, and they sit on a beach that was artificially*

*made, something that looks like it came from Disneyland, and play golf on a golf course*". Some of the participants with VI expressed the belief that activities in general should take place in inclusive environments rather than being segregated. For Stefan (M, VI), it is important to share activities with sighted peers, even mundane things like jogging. Aderyn (F, VI) emphasized that it was important for her that the holidays are *"not special, [...] with disabled people that want help"*.

**Trust and fears.** Two themes – trust and fears – contain factors that seemed to facilitate or hinder the process of choosing an inclusive holiday respectively. Trust was related to two objects – the company organizing the holidays and the other participating customers. Meeting company representatives in fairs, reading online reviews or watching video testimonials, according to the interviewees, increased their trust in the organizers and reassured them in their decision. Personal word of mouth, however, was described as the most convincing source of information. For Evelyn (F, sighted), a friend expressing positive evaluations of her own experiences with the organizer's tours had been sufficient to persuade her to book their service. Molly (F, VI) explained that she chose the specific travel organizer because she had not heard anything about the competitors from her contacts. Martha (F, sighted) described the absence of online reviews as a barrier for deciding to join an inclusive holiday: *"I have tried to read reviews online, but I find very-very few of them, which surprises me and worries me a little bit"*. Naturally, actual participation in an inclusive holiday had a significant influence on the trust towards the organizer as well as a better understanding of the type of individuals joining such tours.

Fears related to other holiday participants were rather common among the interviewees. Persons both with and without VI mentioned their fears of meeting or being assigned with companions that would not be interesting to converse with. Evelyn (F, sighted) recalled her experience of being in the same group with one other traveler:

*There was this lady, she just had nothing to say, boring, and I was 'Oh my gosh, I don't want her on the day when we are kinda walking around Pompeii or something'. Because she wasn't very educated and stuff. Maybe I sound a bit snobby.*

Marc (M, VI), who has not participated in an inclusive holiday and did not intend to join one in the future, explained his disinterest in the concept partially through the incongruity of his interests with those of the potential sighted guides:

*A lot of sighted people are kind of interested in other things, you know. I just think it's kind of abstract and boring. I never see the interest that sighted people have in certain things.*

For persons with VI, the fear about the unknown sighted guides joining a holiday also had a safety aspect. Jeremy (M, VI) mentioned the absence of information about the type of sighted guides joining inclusive holidays as worrisome for persons with VI who have not had such experience before. For Marc (M, VI), even training of sighted guides would not be sufficient to relieve his worries:

*Guiding is a talent. Some people will tell you, we have been trained or we haven't been trained, [but] it's generally a talent. Some people can do it, some people can't. So I think there's a kind of a sense that if they're not very good, then you're vulnerable and quite unsafe.*

He also questioned the motivations of participants with VI and their sense of “*responsibility and accountability*”. However, prospective sighted guides also feel anxieties before going on inclusive holidays. Erin (F, sighted) expressed her nervousness related to her lack of experience of dealing with persons with various degrees of VI and uncertainty about her ability to offer the appropriate level of support. Amber (F, sighted) elaborated on her own uneasiness:

*I suppose, before I went, I was a bit nervous about saying the wrong thing or offending somebody by saying, ‘Oh did you watch the television program last night?’, and then thinking, ‘Oh no, you can't see, so can't watch, what are you asking about!’*

For those interviewees that managed to participate in an inclusive holiday, such fears would dissolve after the participation. At the same time, for the non-participants, they seemed to be the main hindrance in taking the decision to participate.

**The motivational cycle.** As many of the interviewees participated in multiple inclusive holidays, often organized by various tour operators, the motivational process obtained a cyclical or spiral form. Motivations prior to the first occasion of

participation and the ones for following holidays were different. Fears and anxieties would commonly not be affecting the decision for subsequent participation decisions. For many of the interviewees without VI, the advantage of inclusive holidays in terms of the depth of the experience was more obvious after the first impressions. Alan (M, sighted) expressed the perception of exclusivity of inclusive holidays: *“Because we [persons without VI] get to do things we don't normally get to do”*, referring to participating in activities that are not normally available to mainstream travel groups. Such lived experience would then translate into the reason for joining another holiday, to a different destination.

Joining the small community of inclusive holiday ‘alumni’ would be another difference to non-first-time participants:

*So sometimes, we will contact each other saying, ‘Look, this holiday has just been released. Did you fancy going to it?’ Maybe if one or two of your friends are going, you might decide to go on it. That does happen!* (Alan, M, sighted)

Traveling with friends made on previous tours also relieved the earlier fears of not finding someone interesting on the holiday.

As for grounds for deciding not to join subsequent holidays after the first experience, interviewees mentioned clear tangible reasons rather than a mismatch with their initial expectations. Such situations included cases of service failure on behalf of the tour organizer, often not even directly related to the individual. Evelyn (F, sighted) explained that the way the tour representative had handled conflict situations with other participants during her last trip and the absent response from the organizer to the issues that she brought up after the holiday made her decide not to go on an inclusive holiday at least with that organization. For Erin (F, sighted), a similar decision was a result of an injury that she suffered in her last inclusive holiday while being a sighted guide. While none of the interview participants mentioned perceiving inclusive holidays as a one-off experience, Molly (F, VI) remarked, *“I'm not aware of a lot of younger sighted guides that have been more than once on a holiday: they just did the experience, because it's something different, and maybe not go back again”*.

#### 1.4.2 Theoretical re-description

When considering the patterns expressed in the themes through the lens of Gnoth's *Process of Motivation and Expectation Formation* (1997), the findings can



be re-described and summarized in the following way. Persons with and without VI commonly share the same inner motives that ‘push’ them to travel. These are very similar (if not identical) to ‘push’ factors identified by previous research on other forms of tourism – relaxation, exploration, and gaining knowledge. Enhancing social contacts and curiosity were also identified as motives, although described in different terms by different participants. The inner ‘push’ to provide help was considered as a motive for some participants, which mirrors the concept of intrinsically motivated volunteer tourists (Wearing & McGehee, 2013). As motives may lead to various behaviors, it is common for people to satisfy them also with activities other than inclusive holidays – traveling locally or traveling in other formats, attending community events and museums, or volunteering on a regular basis. For a choice of an inclusive holiday to happen, a congruence between these motives, certain situational factors, as well as the ‘pull’ factors is necessary.

The values – or the learned coping strategies that guide behaviors – differed among the participants. These included the preference for traveling with company, preference for traveling with companions other than a partner or family members, the perception of travel as a self-indulgent activity that needs to be compensated, and the rejection of mass tourism. The ‘pull’ factors included the specific destinations visited during the holiday as well as perceived characteristics of the offer (e.g. itinerary, program) and of the travel organizer. The situational factors included the absence or non-availability of usual travel mates, the availability of free time, the influence of friends or acquaintances. The coupling of motives with situations resulted in observable and cognitively constructed motivations. Once motivations resulted in an actual participation in an inclusive holiday, the experience of participation, according to Gnoth (1997) should affect the values and the expectations that would subsequently affect future motivations. The collected data indicated that participation experience affects the trust and fears, which are not covered in Gnoth’s framework.

### 1.4.3 Retroduction and discussion

In critical realism, retroduction is the “thought operation involving a reconstruction of the basic conditions” for the occurrence of phenomena (Danermark et al., 2001). It involves a move from the concrete (observations) to the abstract (contextual forces) and back again (Fletcher, 2017). In order to identify those deeper contextual (causal) factors that result in the social phenomena observed through the interviews (i.e. motivation for participating in inclusive holidays), the principles

of the multilevel analysis doctrine (Cacioppo & Berntson, 1992) were considered. First, however, the theoretical framework provided by Gnoth was adapted based on the findings of the interviews and their subsequent analysis. The most important change, as depicted in Figure 1, is the addition of trust and fears into the process. Trust and fears played a significant role in the decision making process of participants and non-participants of inclusive holidays, as it was revealed in the course of the interviews, yet they are not explicitly considered in the *Process*. It was not clear at which point trust and fears influence the formation of motivations, either by facilitation (by trust) or hindrance (by fears), but it is likely that the influence is significant throughout the whole process. The addition of trust and fears also allowed considering the influence of additional contextual forces on the motivation formation.

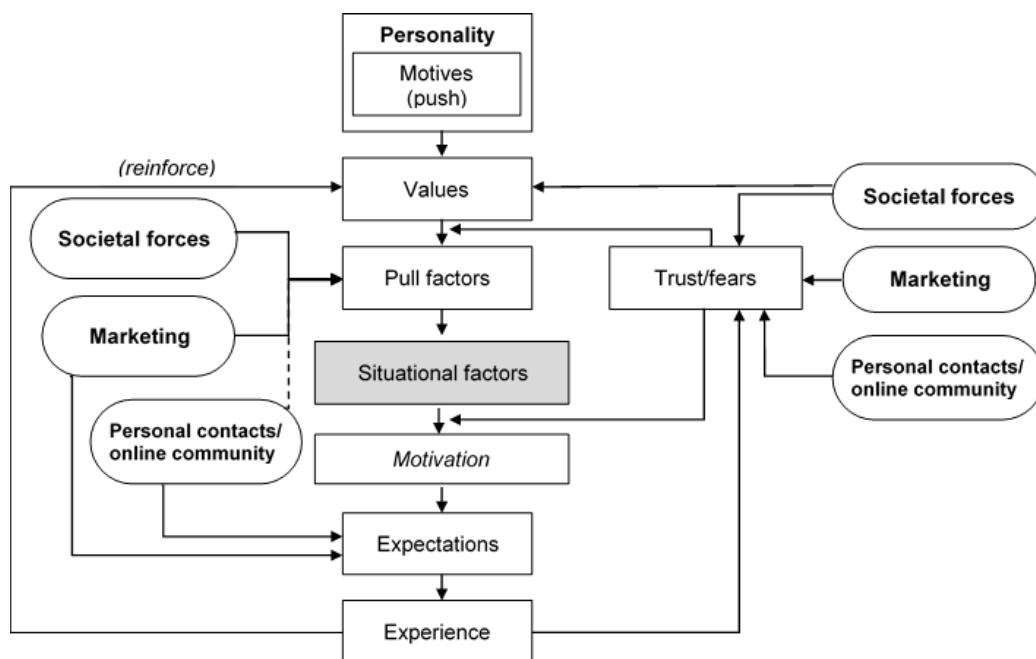


Figure 1. The Process of Motivation and Expectation Formation of Gnoth (1997) adapted based on the findings of the study

As in this paper, tourist motivation was considered through the prism of social psychology (and to a lesser extent, psychology and sociology), motivation formation was examined at two levels of organization – the personality level and the societal level. As the motives (or ‘push’ factors) are considered the abstract internal drives of behavior, it was difficult to distinguish them from the personalities of the interviewees. Although the common motives of choosing inclusive holidays coincided with those reported for other forms of travel, scholarly literature does not provide an unambiguous answer on whether these motives are shared by all

humans or only by those who travel, and whether these motives are products of certain types of personality. A clear pattern was observed in the type of personalities of interviewees that participated in inclusive holidays. Such personality traits were sociability, innovativeness, curiosity, empathy, and altruism. Without any other suggestions from the data, motives were thus considered embedded in the personality of the customers. The factors that affected the selection of certain individuals from the broader array of persons sharing these personality traits were located down the motivation formation process.

Values are less abstract than motives and therefore were easier to identify through the interviews. According to Gnoth (1997), values can be bio- or sociogenic. While values can have a strong connection to an individual's personality, those guiding the behaviors of the interviewees towards choosing inclusive holidays were predominantly sociogenic. The attitudes towards leisure travel as a self-indulgent activity as well as the rejection of mass tourism products are results of wider societal forces (trends) or forms of high-altitude collective agency. Such societal forces also play an important role in the formation of fears that affect the motivation formation in a negative way. Fears related to being patronized or to patronize someone are social constructs that have developed over the previous history of interaction or non-interaction of persons with disabilities with persons without disabilities.

Fears and trust are also affected strongly by close social contacts of an individual and the marketing activities of the organizations offering inclusive holidays. Lived experiences shared through word-of-mouth by close friends decrease uncertainties, alleviate fears, and increase trust in the organizer or the product offered. Online reviews may, in a way, substitute close social contacts in this process. The organizer itself may also affect the fears and trust by addressing common concerns in its marketing communications or even by the product design itself. Marketing communications, as well as societal forces, influence the 'pull' factors within the motivation formation process. The attractiveness of specific destinations and the perceived relative advantages brought by the specific holiday product are the outcome of these influences. While not expressed in the interviews, it is likely that 'pull' factors are also affected by close social contacts.

While the personality (including the inner motives) of an individual in combination with sociogenic values provides the disposition towards inclusive holidays

(necessary conditions for a motivation to develop), it is the situational factors (i.e. fortuity) that enable the motivation to solidify and drive behavior. Without certain external factors, the combination of 'push' motives, 'pull' factors and values is not sufficient for choosing inclusive holidays. Once the situation and the motives coincide, and the participation takes place, the personal lived experience of holiday participation affects the factors in the process of motivation formation for subsequent decisions, most notably the trust and the fears. As the latter component can be considered the fork that divides participants from non-participants, the increase in trust and decrease in fears as a result of inclusive holiday participation increases the likelihood of future participation, while the decrease in trust and increase in fears would have the opposite effect. Even in the first case, the supporting situational factors are essential for an instance of consequent holiday participation to occur.

Gnoth (1997) suggested that the tourism experience affects the values of the individual, particularly those that are inner-directed or affective. Advances in behavioral science that appeared after the publication of the framework may explain how this particular process occurs. More specifically, participation in an inclusive holiday through availability and representativeness heuristics increases the perceptions of an individual customer as someone believing in the values congruent with such holidays (Cornelissen, Pandelaere, Warlop, & Dewitte, 2008) and thus reassures those values. The findings of the interviews do not falsify the existence of such a mechanism.

## **1.5 MANAGERIAL IMPLICATIONS**

The findings of the current study provide valuable insights that may also improve the marketing of inclusive holidays by its organizers. Foremost, it offers a better understanding of the customers that choose to participate in such activities. For participants with VI, the choice of inclusive holidays is rather simple – it is perceived as a way to travel with a company and receive guiding in unknown environments. Among persons without VI, the mechanisms are more complex. While the majority of customers see inclusive holidays as a way to travel and compensate for the feeling of self-indulgence by helping someone, which the format of inclusive holidays allows, there are also those whose main motive for participation is to help. For the latter group, inclusive holidays are an alternative for volunteering. The potential problem with this group is that although participants with VI appreciate

and expect a courteous approach to sighted guiding, they mostly look for simple companionship and shared interests from their sighted peers. Cases where helping becomes the main motive may cause situations of patronization, which will negatively affect the experiences of customers with VI. Not only the tour organizers should avoid such situations by aligning the benefits of the holidays to individuals with and without VI in a compatible way, but they should also address the fear of being patronized or patronizing someone in their marketing communications, since such fears may preclude a potential customer from the purchase.

For another group of customers without VI, the choice of inclusive holidays is guided by rejection of mass tourism and 'shallow' tourist experiences. For these customers, inclusive holidays are an exclusive product that offers multisensual destination experiences and possibilities to undertake activities not available in mainstream tours. In order to attract these customers, the organizations need to emphasize more tangibly the relative advantages of their offers in this regards. As the interviews have shown, customers who have already participated in an inclusive holiday are more likely to perceive this aspect than those who have not, thus clearer and more persuasive communications are necessary. Vivid empathetic testimonials of former participants may be one solution. The offer of destinations also remains a very important factor that organizers can control and should focus on in their product design.

Finally, the study has shown the critical role that situational factors play in the motivation formation. While marketers may not affect these situations, they can design cues that will link such situations with their offers. Some of the organizers of inclusive holidays have already touched upon this by marketing their products as 'singles holidays'. At the same time, this approach may have unwanted consequences, as many of the interviewees expressed their concerns that the term 'singles holidays' suggests travel for romantic purposes, which they do not pursue. Alternatives to this may lie in associating inclusive holidays with their social character as well as the independence that they offer – not only to customers with VI but also to those without, as such holidays allow to travel without the need of finding companions, such as friends and family members.

## **1.6 CONCLUSIONS AND LIMITATIONS**

This paper studied the motivations of persons with and without VI to participate in inclusive holidays. Instead of simply listing the observed motivations as the

reasons for joining inclusive holidays mentioned by customers, the study took an in-depth approach that suggested a structure of these motivations. Based on modern perspectives to studying human behaviors, such as the multilevel analysis doctrine and the concept of human agency, a critical realist form of thematic analysis was applied to a corpus of data collected from semi-structured interviews with participants and non-participants of inclusive holidays with and without VI. Through this methodology, the main contextual factors affecting the formation of motivations were identified, including the defining role of personality on the inner motives as well as the influence of societal forces on the values of the customers and on their fears and trust, which in their turn differentiate actual customers from non-participants. The role of marketing activities in this process was specified and practical suggestions were provided. The findings also suggest a strong overlap with motivations for volunteering and volunteer tourism among customers without VI.

For considering the conclusions of the study, the limitations need to be enumerated. Despite the attempts to recruit study participants representing various backgrounds and situations through multiple channels, the possibility of a systematic bias brought by the self-selection of participants for the interview cannot be discounted. Furthermore, as all study participants came from English- and German-speaking Western countries, it was not possible to consider the influences of culture in the motivation formation process. Interviewing with the use of telephone may have also led to the interviewees being uneasy opening up thus limiting the depth of their narratives. Tackling the research questions with other methods, as well as combining the approach of the current study with methods from the fields of physiology and neuroscience may reveal even more aspects of motivation formation that psychology and sociology may not address on their own.



# **Paper 2. Observing affordances: providing a base for equitable experience design**

## **ABSTRACT**

The paper proposes a theoretical framework for analyzing tourist experiences in a way that can be actionable for service providers and designers. While the concept of affordances, developed in ecological psychology, has been actively used in industrial and interaction design, its potential in the services domain has not been discussed in scholarly research. Through participant observation supported by a wearable video camera during a specialized organized holiday with a group consisting of persons with and without visual impairment (VI), the empirical study illustrates the power of using affordances as units of analysis and identifies service elements that should be addressed to improve the tourist experiences and make them more equitable for persons with VI. It is established that while companies offering inclusive holidays use the social component of the holidays and the process of sighted guiding as a point of differentiation, the design of the holidays lacks elements facilitating and guiding the joint exploration of destinations by persons with and without VI. The limitations of the used methodology are presented, and future empirical studies in other service environments are encouraged.

**Keywords:** affordance, participant observation, mobile methods, wearable camera, sighted guiding, service design.

## **2.1 INTRODUCTION**

Over many years, academics and businesses have put major efforts in finding the best ways to measure customer satisfaction. Treating it as a single judgment, evaluation, and outcome of a consumption process (Giese & Cote, 2000; Verhoef

et al., 2009), offered little insight into *how* high satisfaction levels are achieved (Meyer & Schwager, 2007). The so-called experiential marketing paradigm tackles this challenge by moving the focus to the lived customer experiences (Agapito, Mendes, & Valle, 2013; Schmitt, 2011; Volo, 2009). Developments in behavioral sciences, such as the works of Daniel Kahneman, his colleagues and followers, have been particularly influential in this domain (Dasu & Chase, 2013), but the dynamism of customer experiences requires new creative approaches for examining them in terms that are practically useful for service improvements and general service design.

Specific research on tourist experiences spans from the 1960s (Uriely, 2005). The studies undertaken within sociology, psychology, anthropology or other social sciences have been embracing the distinctiveness of the tourist experience from everyday mundane activities and accentuated the so-called “peak experiences” (Quan & Wang, 2004). At the same time, authors rarely go beyond the subjective perspective of experiences (Quan & Wang, 2004; Uriely, 2005), they often use a phenomenological view that confounds tourist experiences into the minds of individuals. As Larsen (2007) expressed it, tourist experiences are considered as “based in and originating from the individual tourist” (p. 8). Practitioners, such as tourism service providers, however, operate with the service environments rather than the minds of their customers and thus are interested in understanding the influences of the physical and social settings on the experiences of the tourists (Pierskalla & Lee, 1998). This gap is not unique to the tourism context and can be illustrated by any industry where artefacts are being designed for consumption (Flach, Stappers, & Voorhorst, 2017).

One theoretical framework that has been increasingly used to connect the elements of the environment with the perceptions and behaviors of individuals is the theory of affordances. Affordances, defined as the properties of environment that enable possible behaviors depending on the abilities of the individual (Heft, 1989), have been originally introduced by psychologist James J. Gibson in the mid-20<sup>th</sup> century to explain human perception. Over time, the theory has been substantially adapted for use in the design domain (Flach et al., 2017; Maier & Fadel, 2009). Industrial designers have recognized the benefits of this concept given its ability to bridge the properties of a designed artefact with its subsequent uses (Withagen, de Poel, Araújo, & Pepping, 2012). Interaction designers further expanded the notion from what used to refer only to the physical environment to



incorporate non-physical elements (Hartson, 2003). As for service design, which also covers tourist experiences, a thorough review of both academic and business literature did not identify systematic uses of affordances in this domain. This may be explained by the field's nascent stage of development (Mager, 2010) but also by the distinctive characteristics that make service design stand out from other forms of design. As the deliverable of service design is not an artefact in its traditional sense but a complex that consists of ready-made artefacts, artefacts produced during the service process, physical and digital interfaces, as well as social interactions (Holmlid, 2007), affordance theory needs further elaboration for facilitating its applicability.

Affordances are relational concepts, which means that behaviors afforded by the object depend on the behavioral potentialities of an individual (Heft, 1989). As designers create artefacts that will be used by a variety of people, thinking in terms of affordances also helps in facilitating universal design of products and services and targeting those users whose abilities differ from the majority, such as individuals with impairments (Kose, 1998). The theory of affordances can be a particularly practical approach for incorporating the needs of persons with disabilities into discussions on tourism product development. Given the dominant role of visual perceptions in tourism (summarized in the concept of the tourist gaze of Urry (2006)), travellers with visual impairments have been particularly excluded from tourism design. In this paper, it is argued that applying the theory of affordances in studying tourist experiences may shed more light on the peculiarities of designing a tourist experience for persons whose visual perception is limited or absent.

The paper explores the use of affordances for studying tourist experiences with the ultimate goal of informing and supporting service design. Through a novel approach of aiding participant observation with the use of a wearable camera during an organized multi-day holiday, it aimed at identifying those affordances that can be influenced (re-designed) by tourism service providers for improving the quality of their customers' experiences. While participant observation and ethnography have been previously employed in studying organized group holidays (Bowen, 2008; Seaton, 2000, 2002), the use of affordances as the theoretical framework and a wearable camera as a tool allowed for a more granular analysis and more actionable insights. An inclusive holiday for persons with and without visual impairment (VI) organized by a social enterprise was chosen for this purpose,

as it is the most advanced environment, where affordances related to persons with VI may be observed. The subsequent data analysis did not only look into affordances of the physical service- and experiencescapes, but also delved into social affordances provided by service agents and affordances that had appeared in the process of sighted guiding, which involves “a range of tactile-kinaesthetic connections between two different people” (Macpherson, 2012, p. 131). The non-exhaustive list of affordances was used as a base for providing critical points of consideration when designing leisure tourism products for persons with various visual abilities.

The article continues with an overview of theoretical contributions on tourist experiences, experiences of sighted guiding, and an elaboration of the concept of affordances and their use in design. The overview is followed by a detailed section on the methodology discussed in the context of the chosen philosophical paradigm. The findings of the study are then used to provide theoretical and managerial suggestions.

## **2.2 THEORETICAL FRAMEWORK**

### **2.2.1 Tourist experiences and the experience of sighted guiding**

The concept of ‘tourist experience’ has numerous definitions (Volo, 2009). Quan and Wang (2004) differentiated between ‘social science’ and ‘marketing/consumer behavior’ approaches, where the first one focuses only on the peak experiences, while the second one also covers so-called supporting experiences of the consumption process. Scholars also vary by defining a tourist experience either as a culmination of a process of engaging in tourist activities or as a continuous development of tourists’ feelings and attitudes, a dynamic process involving direct observation or participation in events (Schmitt & Zarantonello, 2013; Volo, 2009). Such dichotomy is illustrated by the distinct meanings of two German words that both translate into English as ‘experience’: ‘*Erfahrung*’ denotes the accumulation of experiences and the wisdom resulting from it, while ‘*Erlebnis*’ means the immediate participation or consciousness (Larsen, 2007). While both terms are applicable to the concept of tourist experience, it is the second meaning – ‘*Erlebnis*’ – that has been typically applied when discussing service- or experience design.

Ek, Larsen, and Hornskov (2008) connected the rising interest in the dynamic experiences of tourists (i.e. *Erlebnisse*) with the so-called 'performance turn' in tourist studies. According to the authors, the 'performance turn' is concerned with how tourists "are drawn to and experience [...] destinations" (p. 124). It acknowledges tourists as active co-producers and co-designers of their experiences, who encounter destinations in multisensuous ways, produce stories and photographs that contribute to the shaping of the destinations (ibid). The important role of tourists in the co-production of tourism services has been central in the theoretical frameworks of service-dominant logic (Vargo & Akaka, 2009) and customer-dominant logic (Heinonen, Strandvik, & Mickelsson, 2010), but it is acknowledged that the extent of co-production varies substantially between different types of tourism products located along a continuum between business- and self-organized activities (Frochot & Batat, 2013).

Tourism is typically defined as a spatially and temporarily defined phenomenon (Volo, 2009), but there is no agreement in literature on the spatial and temporal extent of tourist experiences. Within the temporal dimension, tourist experiences are commonly divided into several stages: pre-trip experiences, – which Frochot and Batat (2013) also further divide into pre-purchase and pre-consumption phases, – the trip itself, and the post-trip recollections (Arnould & Price, 1993; Larsen, 2007). Scholars agree that the experience of a tourist starts even before consuming a service, thus trip planning and especially pre-trip expectations are important factors that affect all the following stages (Gnoth, 1997). The trip or the stay at the destination makes up the core experience and involves the tourist's perceptions and sensations. The trip rarely involves one service provided by a single entity, thus it can be further divided into single service encounters. Finally, the post-trip stage involves the memories of the tourist, as well as nostalgia and memorabilia, such as souvenirs and photographs, which may play a substantial role in the tourists' identity construction (Decrop & Masset, 2014).

It has been shown that factors such as personality, background, upbringing of the tourist as a child, social and cultural influences all affect the perception of a tourist experience (Agapito et al., 2013; Frochot & Batat, 2013). The experience itself (or rather the related memories), in its turn, affects expectations for future experiences (Larsen, 2007). Along the lines of such considerations, Edensor (2007) highlighted the ubiquity of tourism practices and their presence in the everyday lives of people. He introduced the term 'touristscape' which refers to the spaces that provide

“familiar and comfortable sensual experiences, so that tourists are able to accommodate themselves easily with serial experiences of place” (p. 207). The scholar stressed that individuals acquire habits as tourists and the tourist industry responds by providing typical “serial touristscapes”. The idea of touristscapes is related to another spatial concept known as ‘experiencescape’, which is defined as the places (tourist attractions, museums, shops, streets, parks) where tourist experiences take place. Experiencescapes incorporate the formation of an individual’s holistic experience at a destination, which also included activities that take place outside of service settings (e.g., enjoying landscapes, conversing with locals) (Mossberg, 2007; Tussyadiah, 2014). Finally, the term ‘servicescape’ refers to the physical characteristics of the environment where a single service encounter and consumption occurs (Bitner, 1992).

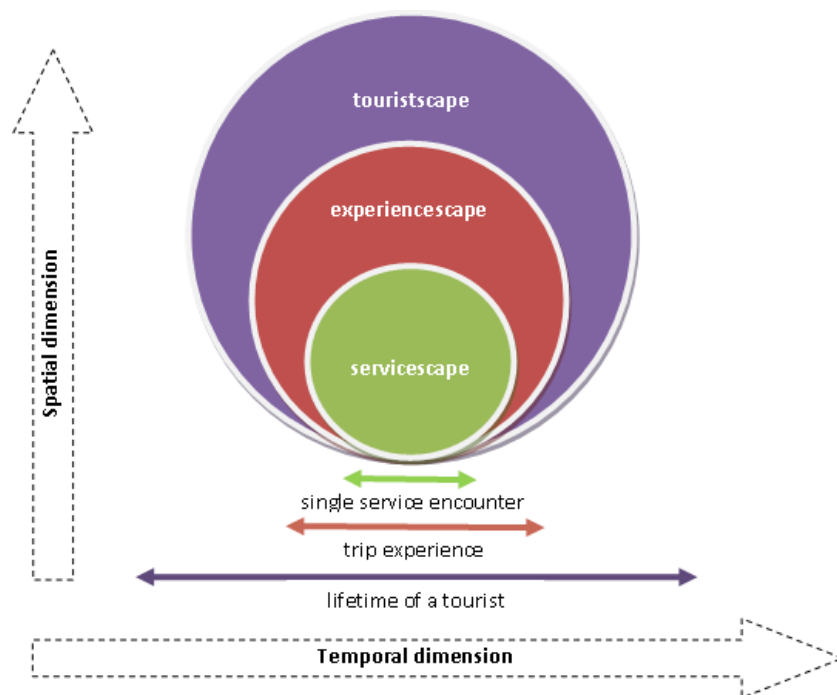


Figure 2. The alignment of the most common perspectives on temporal and spatial dimensions of a tourist experience

Figure 2 illustrates the comparison of the three terms and aligns them with their temporal extensions. Thus, servicescapes refer to a single service encounter, experiencescapes – to a whole trip experience at a destination, and touristscapes – to the lifetime of a tourist (or travel career (Pearce & Moscardo, 1985)). Events as temporal concepts as well as the various environments or ‘scapes’ as spatial concepts can be viewed as nested units, which means that the view can be scaled in and out depending on the interest (Stoffregen, 2000). It also becomes obvious

from such alignment that service providers have substantial control over the experiences of consuming a single service, but their role fades with the broadening of the perception of an experience. In other words, services should be designed by acknowledging their position in the bigger picture and their indirect connection to the other elements of this complex system.

From the perspective of a service provider, considering the experience of a single customer has limited value. Thus, it makes sense to add an additional dimension besides the temporal and spatial one – the dimension of different tourists. Services are designed to be experienced by a high number of people with various backgrounds, physical and mental abilities. The design of spaces has historically been dominated by ocular-centrism with a taken-for-granted understanding of spaces as visual environments (Kitchin & Blades, 1997; Macpherson, 2006, 2009a; Måseide & Grøttland, 2015). The result is that persons whose visual ability differs from those of the majority have to act in spaces that have been designed with an assumption of the ability to perceive visual clues. Persons with VI, including blind persons, share physical and social spaces for various activities with sighted people but their perception of the same space is different – it is more concrete, more practical, more detailed and slower, but most importantly it involves deeper involvement of the body as it relies on tactile perception (Måseide & Grøttland, 2015). As the same spaces are used by persons with blindness and those with full vision, Macpherson (2006) suggested that principles of Euclidian geometry may not necessarily be adequate for their representation (p. 101).

What makes the experiences of persons with VI special is their use of assistive devices (such as white sticks) which extend their body senses and their reliance on guide dogs and sighted guides that have their own agency (Måseide & Grøttland, 2015). Sighted guiding – the process when a sighted person helps a person with VI to explore areas outside of the known environments of the latter (Macpherson, 2012) – is particularly interesting as it frames perception within “a particular kind of social relationship between two persons with normative expectations and demands” (Måseide & Grøttland, 2015, p. 601) and results in “awkward power relations” (Macpherson, 2009b, p. 1045). In an ethnographic study of walking groups with sighted guiding, Macpherson (2009b) found that landscapes emerge as a result of intercorporeal experience and that sighted guides enhance the experience of walkers with visual impairment. Her finding that the shared experience produces “empathetic seeing” on the side of the person with VI has been also supported by

studies in neuroscience (Koster-Hale, Bedny, & Saxe, 2014). The experiences of guide persons (those without VI) are also impacted by the process of sighted guiding (Small, 2015).

Tourist environments where visitors with VI can be expected should be designed with an understanding of the peculiarities of their perception, as it ultimately affects their experiences. Designers should also consider the consequences of ‘intercorporeal’ perceptions that occur when sighted guiding takes place. The concept of affordances has been used to connect the perceptions and experiences of individuals – that have been traditionally studied within psychology and cognitive science, with the needs of designers of products and environments (Flach et al., 2017). The nuanced and situation-specific insights that the concept of affordances offers (Ettema & Schwanen, 2012) could provide grounds for considering the perspective of tourists with VI.

### 2.2.2 The concept of affordances

The theory of affordances was introduced by psychologist James Gibson in the middle of the 20<sup>th</sup> century as a response to the increasing dominance of dualism (of the physical and mental worlds) in psychology. This dualism originates from the classical Cartesian thought on perception as the subjective mental representation of input in the form of physical stimulation (Costall, 1995; Heft, 1989, 2010). Affordances have become the most prominent concept of ecological psychology, a whole direction in psychology advocated by Gibson and other scholars, and they serve as the ontology for the whole field (Chemero, 2003). While the ecological approach has not become dominating in theorizing perception in psychology, affordances have been further discussed in a large number of publications, which according to Heft (2010) also resulted in an ambiguity of the definition of the term. Concomitantly, the concept also received attention and development in other fields, such as engineering and design (Albrechtsen, Andersen, Bødker, & Pejtersen, 2001; Maier & Fadel, 2009).

The simplest definition of an affordance, as given by Gibson himself, is “what it offers the animal, what it provides or furnishes, either for good or ill” (Gibson, 1979, as cited in Heft, 1989). According to Gibson, affordances – or behavioral potentialities related to an object of the environment – are perceived directly, through the structure of the ambient light that carries the functional meaning of the object (ibid). Gibson’s followers defined affordances more specifically as the

animal-related properties of the environment. In other words, for an affordance to exist, the properties of the environment have to be completed by abilities, or effectivities, of the animal (Chemero, 2003). As such, affordances are relational entities – they can only exist when simultaneously considering both a property of the environment and an animal (Heft, 1989).

Chemero (2003) proposed considering affordances as *relations* between animals and features of a situation. This way, he explained that affordances are real without running into the issue of overlapping minds and perceptions. If affordance is a relation rather than a feature of an object, then two individuals may perceive the “potability” of a glass (i.e. one of its affordances) directly, without a mental representation and without their minds overlapping (ibid). The fact that affordances are relationships does not mean that they are not real. Even if an animal and a feature of a situation do not interact, the affordance exists as long as at least one animal with appropriate abilities exists. In case the animal interacts with that particular feature, the affordance will always be the same. Some scholars did not fully agree with the realistic ontology of affordances and preferred a relational ontology (Parchoma, 2014)

Fayard and Weeks (2014) stated that Gibson's theory of affordances “refutes the dichotomy between agency and determinism” (p. 239). Although affordances suggest a direct link between perception and action (Parchoma, 2014), they do not *cause* behavior but rather constrain or control it (Gibson, 1975, 1982, as cited in Costall, 1995). At the same time, intentionality still plays an important role. According to Heft (1989), human intentions are dependent on the functional characteristics of the environment, the abilities of the individual, the history of their interaction, and learning in a social context. Withagen et al. (2012), attempted to explain the relationship between affordances and behavior by suggesting that affordances invite behavior, when they are perceivable by an individual. They further specified that evolutionary processes, the amount of effort it takes to act on an affordance, as well as cultural and personal history, influence the extent to which one affordance is more inviting as compared to others.

Extended discussions on the ontology of affordances (Parchoma, 2014), the acknowledgment of the role of people in ‘creating’ affordances for each other (Fayard & Weeks, 2014) as well as contributions to the development of the concept of affordances from fields other than ecological psychology, prompted some

researchers to distinguish between different types of affordances. Loveland (1991) suggested that every object, person, or other element of the human environment at a time provides three types of affordances that are structured in a layered way. The first type, *affordances for physical transaction with the environment*, incorporates the original Gibsonian view and refers to those affordances that make it possible for humans to get around in their immediate environment. *Culturally selected affordances*, also called preferred or canonical (Costall, 1997), describe the normative and culturally selected meanings of an object. Finally, *social and communicative* (or interpersonal (Fiebich, 2014)) affordances are the affordances provided to a human by another human.

The merit of Loveland's classification is supported by Neisser's (1994) independent attempt in offering a new approach to cognitive theory through introducing three perceptual systems: direct perception, interpersonal perception, and representation/recognition. Loveland's physical (Gibsonian) affordances align well with the direct perception system, social affordances – with interpersonal perception, and canonical affordances – with representation/recognition, by which, according to Neisser (1994), humans “identify and respond appropriately to familiar objects and situations” (p. 228). As such, canonical and interpersonal affordances are only found in humans (Costall, 1997; Loveland, 1991).

The main distinctions between physical and canonical affordances, according to Heft (1989), lies in the intention of an individual. Some behaviors with objects may be preferred or culturally imposed on the individual – such as throwing a letter to a mailbox, but the same object with the same properties may afford other behaviors to the same individual in a different context, such as throwing trash in the mailbox (when no one is watching). Culturally-laden affordances have another side – described as “functional fixity” – the phenomenon when shared definitions of ‘uses’ of an object constrain humans from other uses, e.g. not using a coin to tighten a screw in the absence of a screwdriver (Costall, 1995). Creativity can be considered as the opposite of functional fixity as it involves the ability to go beyond preferred affordances when considering behaviors with objects (Loveland, 1991).

Social or interpersonal affordances describe actions that people afford one another (Mark, 2007). Social affordances assume that for an individual other individuals are part of his/her environment and that relations with them can be described as affordances. Social affordances have been mentioned by Gibson himself but they



have received more attention later, particularly for explaining problems within social psychology (Baron & Boudreau, 1987; Loveland, 1991; Valenti & Gold, 1991). Baron and Boudreau (1987) explicated that social affordances are more complex than traditional physical ones, as they exist in “the reciprocal, coordinated action of two or more individuals” (p. 1223) through the perception of an array of social properties. The authors went so far as to use social affordances as a framework to integrate personality and social psychology.

Loveland’s typology follows a layered structure, which means that there are connections between the various types (layers) of affordances offered by the same object. As studies by Gaver (1996) and Ribero (1996) have shown, there are strong interconnections between social behaviors (i.e. social and cultural affordances) and the physical environment. Furthermore, specific situations may contain multiple affordances to the same subject at different levels, and the more complex the setting – the more affordances it can offer (Baron & Boudreau, 1987). Many of these affordances are shared by groups of people, which as Mark (2007) noted, contributed to an effective use of words for naming objects based on their afforded meaning.

It is easy to see that these three types (or layers) of affordances described by Loveland (1991) mirror the stimuli that compose the expanded servicescape (Rosenbaum & Massiah, 2011). Affordances for physical transaction occur during interactions with tangible elements of the service environment, while interpersonal affordances – with service employees and other fellow customers. Canonical affordances, in their turn, contain the cultural and contextual aspects of actions during service consumption. As a result, a customer experience can be described as an array of various affordances related to the consumption of a service. Viewing experiences in this light, changes the task of the service practitioners, including those in the tourism industry, from simply designing a servicescape to creating or enabling affordances intended to result in a positive experience and ultimately – customer satisfaction.

### 2.2.3 Affordances in design

Over the years, theoretical developments led to an understanding that affordances are not only provided by nature, but humans also play a role in ‘creating’ them for each other (Fayard & Weeks, 2014). In his 1988 book “The Psychology of Everyday Things”, Don Norman introduced affordances into the field of industrial

design (Norman, 2013), and the concept expanded beyond the field of ecological psychology. However, as Flach et al. (2017) noted, the gap between cognitive sciences and design disciplines is significant. In fact, many design researchers abandoned some of Gibson's original postulates, such as that of direct perception (Parchoma, 2014). This diversion can be illustrated by the work of Hartson (2003), who chose to abstract from scientific views on affordances in order to avoid "hair-splitting about levels of human information processing that distract from the practical design issues" and "putting off practitioners who may already believe that concepts like affordance are just fodder for academic exercises" (p. 318). In the same study, Hartson proposed distinguishing between cognitive, physical, sensory and functional affordances. When comparing these with the definitions of affordance within (ecological) psychology, it becomes questionable whether cognitive, sensory and functional affordances are affordances at all, or whether they are placeholders for cognitions, perceptions and intentions.

The gap is understandable due to the different aims of designers and psychologists. The task of the designers is to create artefacts with an intended use, while psychologists (particularly ecological psychologists) are interested in the behavior of humans in their environments *per se*. Therefore it is not surprising that despite his appreciation of the concept of affordances, Norman did not accept the idea of direct perception, but rather followed a cognitive approach (Withagen et al., 2012). Recently, Flach et al. (2017) suggested an approach to mend theory from psychology with the needs of design. Based on an affordance categorization by Gaver (1991, as cited in Blewett & Hugo, 2016), the multi-disciplinary group of authors suggested a three-dimensional view of experiences (at least those related to design artefacts) with *affording* (providing possibilities), *specifying* (describing the information provided to the user) and *satisfying* (covering the intentions and expectations of the user) being the three dimensions. According to this framework, *satisfying* represents the individual user, *specifying* – the interface, and *affording* – the properties of the artefact.

Based on these three dimensions, Flach et al. (2017) identified six different types of design (i.e. six types of artefact features): controllable opportunities (desirable, apparent, and reachable), false opportunities (desirable, apparent, but unreachable), hidden opportunities (desirable and reachable, but unapparent), controllable hazards (undesirable, reachable, and apparent), false hazards (undesirable, apparent, but unreachable), and hidden hazards (undesirable and

reachable, but unapparent). One shortcoming of this framework is its implicit assumptions that the perspectives of designers and users fully overlap and that designers have an authoritative role over the way an artefact is used. In reality, the designed and the actual uses of an artefact often differ significantly. The designer might not be fully aware of all possible affordances provided by the artefact or some of the designed affordances may not be perceived by the users. Moreover, users are increasingly able to change the design of an artefact through its use (Redström, 2008). This is particularly true for service settings with high levels of co-production.

In an empirical study on technological affordances, van Osch and Mendelson (2011) addressed this issue by structuring their observations into three categories:

- *designed affordances* – that have been consciously created by developers or designers regardless of whether they were recognized by artefact users;
- *improvised affordances* – that have been recognized by users while using an artefact but have not been designed by the developers;
- *emergent affordances* – that have not been created by developers nor perceived by the users but had an impact on the use.

The current paper does not intend to find a solution in the disagreements over the use of affordance theory in design. Nevertheless, it suggests that combining the approaches of Flach et al. (2017) and van Osch and Mendelson (2011) as well as the layered structure of affordances proposed by Loveland (1991) and implicitly endorsed by Neisser (1994) may provide a useful framework for describing experiences of persons with and without VI during an inclusive holiday.

#### 2.2.4 Affordances and the visual perception

Gibson's original description of affordances focused on their direct visual perception. Researchers that further developed the concept acknowledged that animals (including humans) get to know the opportunities for action in the surrounding environment by other senses as well, including hearing, touch, and smell (Valenti & Gold, 1991). Regardless of the sense, perception is considered an aspect of action. As Costall (1995) pointed out, "many of the relevant informative structures which support perception, and thereby action, become available only through our own movements and activities" (p. 470). The ecological approach stipulates that perception happens as a result of changing the array of stimulation which allows to isolate the unchanging structure that specifies an object (Gibson,

1966, as cited in Heft, 2010). Thus, looking – or visual perception – takes place when we move our eyes and bodies to change the array of reflected light that makes it possible to identify the unchanging structure of the object in our environment. If an individual without vision is handed an object, the person can only identify the object and its properties by manipulating and tactically examining it (Heft, 2010), but perception still takes place through movement.

While persons with sensory impairments, particularly those with VI and sight loss, have not been specifically mentioned in theoretical discussions on affordances, the ecological approach to perceptions can also explain the role of affordances depending on the human's sensual abilities. If affordances were equated to information in the ambient light, persons with VI would not be able to do even the simplest tasks in the environment. For affordances to be perceived, a person with VI has to use tactile senses to 'find' those affordances. In other words, what makes persons with and without VI different is the perception of affordances, but not necessarily the affordances themselves. Thus, physical (and often social) 'barriers' that persons with visual impairment face can be conceptualized as missing perceptions of existing affordances.

Nevertheless, the great role for visual perception that Gibson assigned to affordances implies that information about the affordances of the environment is public. In other words, with visual perception one does not have to occupy a place of another individual to perceive the affordances for that individual. As studies have proven, people can judge the affordances of other individuals by means of observation (Mark, 2007). This conclusion means that people can foresee affordances for other individuals and design environments for them. Although an affordance exist only when considering an individual and a feature of situation (or a feature of object), it does not mean that affordances are unique. As long as there are humans with common abilities, the same object may provide the same affordance to several people, which means that persons can be conveniently grouped according to applicable affordances in relation to an object of the environment (Maier & Fadel, 2009).

## **2.3 METHODOLOGY**

### **2.3.1 Research paradigm and research design**

The choice of affordances as units of analysis for this study was based on their unique ability to provide theoretical connections between a tourist and his/her environment as well as to embrace the varying nature of humans and their bodies. As it was mentioned above, there have been substantial discussions on the concept, which resulted in diverse philosophical understandings of affordances that range from positivism to interpretivism (Blewett & Hugo, 2016). Nevertheless, the majority of ecological psychologists, including Gibson, agree on a realist ontology. While affordances are described as relativist phenomena, there is an agreement that they exist even if they are not observed by any individual and that they are always the same when an individual and an object in a certain situation meet (Chemero, 2003; Heft, 1989). A realist ontology is also natural to design scientists, given their reliance on the physical properties of objects (Flach et al., 2017).

This study followed a critical realist paradigm. While affordances are real, the simple positivist view of direct perception does not explain appropriately the complex relationships in the modern socio-technological world (Blewett & Hugo, 2016). Through a critical realist lens, the author acknowledged the layered nature of affordances (Loveland, 1991), whose properties emerge as a result of the mutual influence of the material and of the social (Gaver, 1996; Ribero, 1996). A layered consideration of affordances fits well with the stratified ontology of critical realism with its real, actual and empirical domains (Danermark et al., 2001). The chosen research paradigm also framed the choice of the methodology used in the study. Instead of experiments, typically used within a positivist worldview of affordances, the main source of data for the current study was observation of tourists' behaviors during a holiday.

### **2.3.2 Data collection**

A combination of participant observation and individual interviews was adopted as the data collection methodology for this study. The individual interviews were used to corroborate the findings of the analysis of the observational data. The observations took place during an organized holiday offered by a specialized tour operator that markets inclusive holidays for persons with and without visual impairment. The week-long tour took place in April, 2017, in Italy, and involved a

variety of common tourist activities, including guided city tours, food tastings, a visit to a spa, group meals, and other activities, including un-organized ones. The group consisted of 18 participants, including the tour group leader and the researcher. Seven members of the group had various forms of VI. The participants (other than the researcher) were residents in the United Kingdom, United States and Canada. The holiday was designed in a way that every day the group leader paired every participant with VI with a sighted guide (SG). As the number of SGs was higher, they also had 'free days', when they were not paired with a participant with VI.

In line with a protocol approved by the institutional review board of the author's university, all tour group members were informed about the study before the holiday's start and were offered an informed consent form. All but three group members (three SGs) agreed to participate in the study with a signed consent form. Observations related to the three group members who chose not to participate were removed from the study findings. The consenting participants were contacted one year after the tour with an invitation for an interview, as per the signed consent forms.

The group traveled from an airport in London to Italy and back together, whereas the researcher joined upon the group's arrival to Italy and stayed with the rest of the participants throughout the holiday until the group's transfer to the airport for the return flight. Apart from the arrival and departure components of the holiday, the researcher participated in the tour as a regular participant and an active SG. While the holiday was offered as a product (service) by a tour operator, it also included individual service encounters with other service providers (e.g. the hotel, the spa, tour guide). It means that the environment can be described as an experiencescape rather than one single servicescape.

In addition to participation in the group holiday, the author observed the behaviors of other tour participants and conversed with them in informal settings. Seaton (2002) listed several advantages of participant observation as part of ethnographic research during organized tours, including the closed ethnographic context of a tour, quick induction of the researcher as a fellow tour participant, closed timing of the tour and the observation, stable sample of participants, and captive audience. All these conditions were applicable to the observations conducted for the current study as well.

Observation as a method has been previously used to study affordances in gardens (Laaksoharju, Rappe, & Kaivola, 2012), classroom environments (Duff & Lier, 1997) and augmented reality (Dunleavy, Dede, & Mitchell, 2009) among others. Its suitability to study affordances stems from the public nature of affordances and the ability of humans to identify the affordances available to other individuals, which has been previously emphasized by several scholars, including Gibson himself (Mark, 2007). Previously, observations of affordances in scientific studies have been conducted in laboratory environments or in the field from a static vantage point. The spatially dynamic format of the holiday covered in this study warranted a mobile method of enquiry (Büscher & Urry, 2009), for which participant observation was seen suitable.

Participant observation provides a direct access to the observable environment and behaviors of research participants taking place in a natural setting in an unobtrusive and less burdensome (to the subjects) way (Jorgensen, 2015). The merits of participant observation have made it particularly popular in service design research (Segelström, Raijmakers, & Holmlid, 2009). Conducting the observations as a tour participant, provided the researcher with the opportunity to consider the context of behaviors without manipulating the situations beyond ordinary forms of human management (Jorgensen, 2015). While the informal conversations with tour participants provided an insight into the thoughts, feelings, and experiences of the individuals, the focus was predominantly on human behaviors associated with various types of affordances during the tour, especially those under the control of the tour organizers and other service providing staff.

Participant observation over a long time is characterized by substantial physical and psychological burden for the researcher (Bowen, 2008). This was particularly true for the current study, where exhaustion related to active participation and particularly sighted guiding could affect the quality of the observations. To overcome this problem, the observations were documented with the help of a GoPro Hero 5 wearable action camera. The camera, worn on the body of the researcher at chest level, could capture the moment-to-moment events from the perspective of the researcher in a video format. There are many benefits of video-recording observations for data analysis. Belk et al. (2018) argued that video-recording “makes observations permanent and accessible”, which ultimately helps to generate “further and more novel theoretical interpretations” (p. 2). It is suitable for preserving the social and behavioral mechanisms as well as the context of the

environment that structure the interaction of individuals with their environment and with each other (Jewitt, 2012). Therefore, video-recording is very practical for studying affordances, which may only be realized through interaction. Video recording has been used previously for documenting observations of affordances, albeit from a fixed location only (van Osch & Mendelson, 2011).

Context (situation, culture):
Physical setting (props, spatial relations, barriers, size of setting, environmental conditions):
Who:
Doing what:
With whom (significant others):
Relationships (aural, visual, tactile, olfactory, symbolic):

Figure 3. Format of observation notes adapted from Zeisel (2006) and used in the study

As the limited battery life of a camera provided only up to four hours of video recording per day, only the organized guided tours were documented this way. In addition, the researcher took written notes on observations in other environments, such as at meal times or during the spa visit. The written notes followed the format suggested by Zeisel (2006) for conducting comprehensive documentation of environmental behavior observations. This format, illustrated in Figure 3, incorporates not only the description of behaviors but also of their immediate context. The documentation (hand-written and digital) included descriptions of behaviors of tour participants without explicit consideration of the theory of affordances.

### 2.3.3 Data analysis

A combination of the theoretical approaches suggested by Flach et al. (2017), van Osch and Mendelson (2011), and Loveland (1991) was used as the base for analyzing the data collected during the observations. This combined framework,



depicted in Table 3, distinguishes between designed, improvised and emergent affordances but also connects each with applicable quadrants of the matrix by Flach et al. (2017). While service designers may create (even inadvertently) all six types of designs in terms of their specification, satisfaction, and affording, the customer experience may also involve interaction with expanded servicescape elements not created specifically by the service provider. Thus, improvised affordances include controllable and false opportunities as well as controllable and false hazards but exclude any affordances not perceived by the customer. Those affordances that the customers do not perceive but that have an impact on their experience indirectly can be regarded as emergent ones and include hidden opportunities and hazards.

Table 3. A framework for analyzing affordances of designed service elements (Based on Flach et al. (2017); Loveland (1991); van Osch and Mendelson (2011))

<b>Designer's perspective</b>	<b>Applicable design types</b>		<b>Affordance level</b>
Designed affordances	Controllable opportunities	Controllable hazards	Physical Interpersonal/Social Canonical
	Hidden opportunities <i>(should be made apparent by design)</i>	Hidden hazards <i>(should be made apparent or removed by design)</i>	
	False opportunities <i>(should be hidden by design)</i>	False hazards <i>(should be hidden by design)</i>	
Improvised affordances	Controllable opportunities <i>(should be incorporated into the design)</i>	Controllable hazards <i>(should be incorporated into the design or should be removed/avoided)</i>	Canonical
	False opportunities <i>(should be hidden by design)</i>	False hazards <i>(should be hidden by design)</i>	
Emergent affordances	Hidden opportunities <i>(should be made apparent by design or left to be discovered)</i>	Hidden hazards <i>(should be made apparent by design)</i>	

It is important to note that the original framework suggested by Flach et al. (2017) has been developed for the needs of industrial and interaction design. As mentioned earlier in this paper, service design outstands with the complexity of its outcomes that include tangible and non-tangible elements alike. Introducing the layered structure of affordances, which includes physical, canonical, and interpersonal affordances (Loveland, 1991), into the framework permits the consideration of a wide variety of service encounters, including those related to human contact. These three levels have been added in Table 3, where for each design type a general recommendation to service designers is also provided in parentheses. For example, improvised affordances that have not been designed (or controlled) but have been improvised by the customers, should be incorporated into the design in order to provide more control on behalf of the service provider.

Table 4. An excerpt illustrating three situations comprising the findings of the data analysis

<b>Situation</b>	Guide warns about a car and pulls guests to the side of the street	Not every participants with VI happened to use the touch figure; no order for sharing it	One SG suggests to go around the large replica for everyone to be able to touch it
<b>Designer's perspective</b>	Designed	Designed	Improvised
<b>Design type</b>	Controllable hazard	Hidden opportunity	Controllable opportunity
<b>Physical layer</b>	'Hittability' of the customers, 'steppability' of the street surface	(Missing) 'touchability' of the figure	'Touchability' of the replica; "movability" of the people
<b>Interpersonal layer</b>	Social invitation to move	-	Social invitation to move
<b>Canonical layer</b>	Sides of the street are for pedestrians	-	Replicas represent real structures
<b>Interview question</b>	<i>What are the responsibilities of the tour guide in terms of street safety?</i>	<i>How important is it for you to have a touch alternative for verbal description of architectural elements?</i>	<i>What is the importance of three dimensional touch maps and replicas in your travel experience?</i>

During the data collection phase, the behaviors were captured without an explicit consideration of affordance theory. After the completion of the tour, the notes and the video materials were reviewed and coded for analytical purposes. For the initial

coding, the six designs elements proposed by Flach et al. (2017) were used. With the help of the interface of the *Simple Video Coder* open source software tool (Barto, Bird, Hamilton, & Fink, 2017), the author viewed the videos multiple times, and focused on situations of micro service failures (such as when actions or intentions of the tour participants or of the service employees failed) and visible expressions of emotion (e.g. surprise, disappointment, delight). These situations were coded and supplemented with a short textual description. At the next stage, each coded video segment was aligned with the three types of affordances from the designers' perspective (as used by van Osch and Mendelson (2011)), and applicable affordance levels (physical, canonical and social (Loveland, 1991)) were identified. For the written notes, a similar coding procedure was followed but without the use of specialized software.

#### 2.3.4 Corroboration with interviews

The data analysis procedures resulted in a list of 39 situations described in terms of affordances that had a direct or indirect relation to the service designed by the tour organizer or delivered on its behalf. An excerpt containing three such situations is presented in Table 4. These situations were used to develop an interview guide (Appendix 3) for conducting follow-up telephone interviews with tour participants that have been contacted one year after the completion of the tour, as per the forms the consenting participants signed. Six of the former tour participants (three with and three without VI) agreed for a telephone interview. The conversations that lasted around one hour each were recorded and transcribed verbatim. As the interviews took place one year after the actual experiences, the questions were phrased in general terms, although they reflected the affordances identified through analyzing the earlier observations. The customer responses were used to evaluate the importance of the various affordances from a perspective other than the researcher's.

## 2.4 FINDINGS AND INSIGHTS

The findings of the analysis were grouped in four main parts – 1) those related to the tour guiding services, 2) to the provision of meals, 3) the spa experience, and 4) the relationships between participants with VI and the SGs. Except for the last one, each can be considered as a service element under the direct control of the tour organizer or the employees working on its behalf. The relationships among the tour participants, while not under the direct control of the service provider,

necessitates a careful consideration given the importance that the participating customers attached to it in the course of the interviews and due to their dominant role in differentiating the tour organizer's offer on the market. The remainder of this section is reported from the perspective of the author with the use of first person pronouns. On the one hand, such reporting follows the tradition of qualitative research (of which participant observation is a part) in placing the researcher into the narrative of findings. On the other hand, it is used to acknowledge all the limitations (discussed later) that the researcher brought into the scientific study – limitations that are inseparable from any research method and cannot be hidden behind impersonal sentence structures.

#### 2.4.1 Tour guiding services

The tour organizer hired local tour guides in several of the destinations along the tour's itinerary. Based on their personal introductions, all of these professionals had previous experience with offering guided tours for persons with visual impairment. Almost all of them employed techniques not commonly found in more traditional guided tours, such as invitations to touch the textures of different architectural elements or the provision of small three-dimensional models and tactile maps (images with raised surfaces). As some of the guided tours moved through narrow crowded city streets or through crowded shared spaces (where both pedestrians and motorized traffic use the same lane), I observed several potential hazards, described in affordance terms as the 'bumpability' of pedestrians, 'collidability' with cars and bicycles, 'approachability' by street beggars and by locals promoting different services. Occasionally, the tour guides warned the group about approaching cars (i.e. controllable hazard), but in most cases the group members had to deal with these situations as they occurred (i.e. hidden hazards). In the telephone interviews, both SGs and participants with VI expressed feelings of anxiety and discomfort when rushing through crowded streets to follow the lead of the tour guide. This finding implies that avoiding such hazards – for example through planning the itinerary through less crowded streets (as long they do not miss the major attractions and thus do not diminish the value of the experience) – or specifying the hazards through more systematic warnings, especially given the local expertise of the guides – could make the service experience less stressful for the customers. One participant with residual sight also noted the benefit of having a bright visible object (such as an umbrella) to lead the way and avoid group members getting lost.

The majority of the tour guide related affordances that I have observed were associated with the interpretation and provision of information. The latter were performed through offering verbal descriptions and enabling tactile experiences. Here, the tour guides offered a number of “designed” or intentional affordances. Many of the interviewed participants listed the permission (controllable opportunity) to approach and touch the baptismal font in one of the cathedrals – normally sealed off for visitors – as one of their most memorable experiences during the trip. At the same time, I also observed a rather chaotic handling of the tactile figures and maps in some of the tours. As none of the tour guides, who provided them, suggested a system of making sure that every group member gets to hold an item for some time, the participants ended up improvising the process themselves. On some occasions it worked, as when being introduced to a large three-dimensional scaled replica of one of the cathedrals, a SG suggested walking around the replica in a circle, so that every participant gets to touch the various parts. In other tours, however, some participants, including those with VI, ended up not having access to the figures at all, which was also mentioned in the interviews.

Together with some of the participants with VI, I recognized two additional issues. First, the offer of tactile materials did not reflect the most important elements of the environment, and thus did not always match the verbal explanations of the guide. As one PwVI explained, touch maps that depict base outlines of buildings offer less value than those with a three-dimensional representation of the facades. Second, several group members with VI noted the importance of the level of detail: although they appreciate the realistic representation of texture (also mentioned by SGs), too much detail may hinder the perception of the general outline of the represented object. As the models used by the tour guides were simple souvenirs rather than exact replicas, many of the participants chose not to engage with them at all. My recommendation here is to be more selective with choosing tactile materials and to choose them based on the interest of the group participants rather than by their mere availability. When such materials are presented to the customers, tour guides should suggest a systematic way to allow each interested group member to engage with the items. It is important to remember that spatial perceptions of persons with visual impairment are more concrete, more practical and deeper, but also slower (Måseide & Grøttland, 2015), thus sufficient time should be planned for this activity.

Another important point is to align the tactile perceptions with verbal descriptions, or alternatively, to provide a chance for personal exploration without verbal

distractions from the tour guide. While the participants I interviewed did not recall experiencing dissatisfaction with the verbal descriptions of the tour guides, I observed situations where tour guides used hand gestures or other non-verbal communication without accompanying it verbally. For participants with VI, this resulted in an interpersonal hidden opportunity. The intonations used by the Italian tour guides for asking questions or expressing sarcasm were also not always perceived correctly by the non-Italian group (canonical hidden opportunity). I also observed situations, where tour guides lacked vocabulary to provide descriptions of the architectural elements. In some of these cases, tour participants improvised by jumping in with their own descriptions. Some of the interviewees with visual impairment mentioned that when the SG they were paired with or the tour guide were not providing a satisfactory verbal description, they would rely on the descriptions of other SGs. This led me to the idea that tour guides should not only be more careful with their verbal presentation, – which should not exclude listeners with limited vision or those who are not looking at the gestures at the moment, – but also to involve the participants into sharing their perceptions and impressions with the rest of the group, thus offering higher level of co-creation.

#### 2.4.2 Interaction between tour participants

Sighted guiding – the process when a sighted person helps a person with visual impairment to explore areas outside of the known environments – is a distinctive feature of the tour I have observed. With a few exceptions (Macpherson, 2006, 2009a, 2009b, 2012; Small, 2015), this activity in a leisure context received little attention in scholarly research. At the same time, most of the complaints I have heard from both participants with VI and SGs were related to it. Before the start of the tour, SGs received an electronic document with some guidelines for sighted guiding as well as a 10-minute training by the group leader at the airport before departure. Despite these guidelines, I noticed several occasions where the SGs failed to provide a safe walking experience for the companions with VI they guided, which resulted in the latter bumping into walls or other passer-bys, falling, or being harassed by beggars. Some of the SGs I interviewed also expressed their anxiety during the process, as they did not feel confident on whether their guiding was satisfactory and whether they fulfilled all expectations. There was one case, when a misunderstanding within a pair caused both of the participants to get a minor injury as they were boarding a train. I independently interviewed both persons involved, and both mentioned the feeling of awkwardness during the remainder of

the trip. In fact, the two participants did not speak to each other after the day of the accident. While the tour organizer cannot influence the relationships between the participants, the need for more training before the tour and more support during the tour was articulated by both SGs and participants with VI. More interactive and empathetic training methods, such as videos or informal exercises, where both SGs and persons with VI are involved, could bring more attention to the critical moments in the process.

The importance of power relations between SGs and the participants with VI during sighted guiding has been noted before (Macpherson, 2009b). During my own involvement as a SG, I noticed the diverging timings of perception between mine and of my companions with VI. Through vision, I noticed landmarks earlier, which caused an awkward delay for the person with VI until I could collect my impressions into a verbal description. Furthermore, I realized my role in affecting my partner's experience by choosing which elements to describe or to which parts of a large tactile replica to point. I also observed other SGs occasionally leaving their companions with VI to take photos or engage in activities that their partners with VI could not follow due to visual limitations. During the interviews, participants with VI reflected on this topic by expressing their understanding that SGs should also enjoy their holiday, even in ways that visual impairment does not permit, as long as they ask their companions about their interests and address them in their verbal descriptions and provide support during shared tactile map experiences. This observation also uncovered a possibility for a different type of joint exploration that can be taught both to SGs and participants with VI. As the perceptions of persons with different visual abilities are so different, having a more structured approach to expressing them to each other could create a differential aspect for this type of holidays.

### **2.4.3 Meal experiences**

I did not record meal experiences on camera, but through my written notes, I identified two aspects that can be described as hidden opportunities for group members with VI and thus would need improvement. First, I have observed the extra difficulties that SGs and participants with VI had when dealing with the breakfast buffet. In the interviews, participants complained about the negative feelings caused by the need to ask and describe the whole selection of dishes for the day and subsequently getting them served. This situation may be significantly improved by providing a simple overview of the offered dishes before the meal

times. Second, I have observed and noted situations when some of the group members with VI had difficulties in handling certain meat and seafood dishes. This problem has been already noted elsewhere (Bilyk, 2002), and a possible solution would be offering such dishes in less formal dining settings, where the particular use of utensils is not so important. In addition, I observed improvised games among the participants, when they tried to guess the menus for the dinner based on the smells coming from the kitchen. This could be an interesting idea to consider when the tour organizer designs the meal experiences.

#### 2.4.4 Spa visit

A visit to a local spa was included in the package of the tour for everyone, yet many participants, predominantly those with VI, chose not to participate. There can be many explanations for this, but one plausible one is the complicated spatial navigation in water and the higher incidence of hazards (such as slippery floors) for persons with VI. Even among those tour participants with VI that decided to join the activity, I observed limited movements around the water attractions available on the floor. Encouragement and recommendations from SGs seemed to change this toward more involvement. This brought me to the conclusion that providing an advance organizer describing the available facilities and the processes essential for a spa visit can lower the anxiety not only for participants with VI but also for all participants that may not feel comfortable with a spa environment.

## 2.5 LIMITATIONS AND IMPLICATIONS

The application of affordance theory to analyzing data collected through video-aided participant observation uncovered many merits and advantages compared to other methodological approaches used to study services. At the same time, it is important to specify what this approach can and what it cannot do. Compared to other approaches to observational research, the use of affordances as units of analysis offers a way to connect the controllable elements of the service with the uncontrollable customer experiences. At the same time, it structures the findings in terms that are actionable for consequent design decisions. That being said, affordances are powerful in describing mainly one aspect of experiences – actions and behaviors. They may also partially explain behavioral motivations, but the theoretical attempts to use affordances to explain personality and social psychology (Baron and Boudreau, 1987; Good, 2007) still lack practical



applications, which means that other means are necessary for capturing experience components, such as emotions, feelings, senses, and thoughts.

In the reported study, this limitation was addressed by corroborating the analysis findings with semi-structured interviews with the customers. This way, the observations were augmented with the perceived importance of the various service elements as expressed by the tour participants. In contrast to applying qualitative interviews on their own, using observations as the base for developing the interview guide made it easier for the participants to reflect on their experiences and to recall specific service situations. It is important to note here that memory distortion may affect the results of the interviews and that by pointing out specific situations the interviewer may direct the attention to matters of interest to her rather than to the customer. For this, the application of “on-line” measurements during the course of the service experience could be considered.

As in any form of observation, the limits related to the gaze of the observer need to be taken in account. These limits are related to the cognitive processes of selective attention and retention. To an extent, both of these were addressed by aiding the observations with a wearable camera. The camera can record events in a significantly better way that human memory could, and it provides an opportunity to spend more time on analyzing the footage. The camera’s focus, however, is also limited, and so is the researcher’s gaze when identifying affordances while re-watching the recording. The researcher may pick up only a selection of the infinite number of affordances available for each situation. Conceptually, affordances are scalable, but that also means that depending on the interest of the researcher, they can be considered at different levels. In the study described above, the service in question was a multi-day holiday composed of numerous micro-services, so the identified affordances were considered at ‘high altitude’. For services or service situations that are shorter in time, it is possible to focus on more specific affordances, even being as precise as to consider the ergonomics of the physical servicescape or the facial expressions and utterances of service employees.

Affordance theory has a strong theoretical backing stemming from both psychology and design studies. As a result, it can provide a more rigorous way of analyzing observational data. While affordances are described as relativist phenomena, there is an agreement that they exist even if they are not observed by any individual and that they are always the same when an individual and an object in a certain

situation meet (Chemero, 2003; Heft, 1989). As industrial designers rely on the physical properties of objects (Flach et al., 2017), it was natural for design scientists to embrace this theory. While observational research is commonly associated with constructivist and interpretivist paradigms, the realist ontology of affordances is compatible with critical realism, which service marketers may find more appealing and familiar. The scalable and layered nature of affordances is echoed by the stratified ontology of critical realism with its real, actual and empirical domains (Danermark et al., 2001). At the same time, the understanding that affordances emerge as a result of the mutual influence of the material and of the social (Gaver, 1996; Ribero, 1996), addresses the complex relationships in the modern socio-technological world (Blewett & Hugo, 2016). As a result, affordances should be of interest not only to industrial engineers but also to service designers and to service marketers overall.

## **2.6 CONCLUSIONS**

This article contributed to advancing the discussion on tourist experiences by proposing a theoretical approach that connects these experiences with the service environments where they take place. A framework for using affordances as units of analysis in the domain of services was introduced based on existing works in psychology and interaction design. This framework allows for capturing tourist experiences in a way that can inform design decisions directly. The framework also proved compatible with studying tourist experiences through participant observation supported by video recording with a wearable camera.

The empirical study, performed in the context of a holiday tour in an inclusive group of people with and without VI, also identified insights specifically related to this tourism product. The analysis revealed service elements – designed and improvised ones – that could either be corrected through service re-design or could be incorporated formally into the service. It was concluded that while the tour organizer uses the social aspect of the travel as a differentiation point on the market, the potential of sighted guiding – in terms of joint exploration and multi-sensory exchange of experience – is not fully tapped. By building on some of the improvised behaviors of tour participants, it is possible to develop even more engaging and unique activities for the customers. The other insights provide suggestions on how to make services, such as tour guiding, dining or spa services, more equitable for persons with visual impairment.

Researchers may use the methodological approach applied in this study for other types of service experiences as well. More application cases will provide more insight into the peculiarities of the method and test its applicability in other industries. It is important to understand that limitations of the methodology and of affordances in explaining experiences. A combination of participant observation with other modern experience measurement techniques, such as measurement of electrodermal activity, may bring even more comprehensive and rigorous results.



# **Paper 3. Identifying Potential Customers for Inclusive Holidays with Qualitative Comparative Analysis**

## **ABSTRACT**

To date, there is little understanding of the market for inclusive holidays taking place in groups consisting of persons with and without visual impairment (VI) – an innovation for the vast majority of customers. While the innovation adoption literature is abundant and offers many theories explaining the causes for purchasing new products, no deterministic model has been found, and some researchers propose the use of configurational logic to study the phenomenon. In this study, Qualitative Comparative Analysis is applied to data collected from two samples from the German-speaking population in Europe. Configurations of consumer characteristics (innovativeness, product involvement, sociability) and product characteristics (perceived relative advantage and uncertainty) were compared across the respondents in their explanation of product interest and expressed adoption likelihood. The findings contribute to the yet limited body of research on configurational innovation adoption by considering customer- and product characteristics within the same analysis. The paper provides marketers of inclusive holidays with an insight about the traits of the potential customers and the aspects of product value that should be communicated for better adoption rates.

**Keywords:** innovation adoption, new service adoption, purchase intention, configurational logic, QCA, inclusive holidays

### 3.1 INTRODUCTION

Inclusive holidays for persons with and without visual impairment (VI) comprise a niche product. They are offered by a handful of organizations worldwide, while the number of persons that have already experienced them is rather small. As the market for this product has not been comprehensively studied, there is little understanding of who are the people that comprise its market and what attracts them. Despite notable coverage in UK-based media (see for example Henley, 2011), the general public, including persons with VI, in countries other than the United Kingdom know little about the concept. As the small organizations (typically charities or social enterprises) involved in this business are not able to initiate extensive awareness campaigns, targeted communications remain the only feasible option. Their implementation, however, requires a better knowledge of the target audience, or more precisely, the people that are the most susceptible to the communicated messages. The purpose of this study is to gain an understanding of factors that affect the willingness to join an inclusive holiday among the German-speaking population of Europe – a sizeable market, which is relatively new to this product.

More specifically, the research addresses the following research question: *What configurations of antecedents lead to an interest in and an intention of participating in inclusive holidays among persons with and without VI?* The *intention of participation* is used as a proxy for identifying individuals who are more likely to go on an inclusive holiday, while the *antecedents* help to describe the individuals and the benefits that they recognize in inclusive holidays. The design of this research relies heavily on the findings of the first study of the dissertation (*Paper 1*), where semi-structured interviews with past and potential inclusive holiday participants as well as voluntary non-participants were employed. Its findings have provided a useful insight into the general reasons why people choose or choose not to participate in inclusive holidays. In the current study, data is collected through means of a structured questionnaire delivered to two samples – of persons with VI and of those without, and analyzed using Qualitative Comparative Analysis (QCA). The latter method provides a possibility to identify those combinations of antecedents that result in the presence of intent and those that result in its absence (Wagemann, 2017).

As inclusive holidays are not widely known among the general public, they can be described as an innovation to the majority of people (Flight, D'Souza, & Allaway, 2011). Consequently, the substantial literature on innovation- and product adoption served as the base for formulating possible antecedents for intent. The findings of the qualitative study on motivations of four participants, in their turn, guided the selection of those factors described in literature that are applicable to the case of inclusive holidays. In line with previous research on innovation adoption, the considered antecedents can be grouped into innovation (or product) characteristics and consumer (or adopter) characteristics (Arts, Frambach, & Bijmolt, 2011). Unlike studies that consider only one of the two groups, the configurational nature of QCA offers an opportunity to consider the interactions between (perceived) innovation features and consumer characteristics within the same analysis. It enables the identification of configurations where certain innovation features have importance for some consumers but not for others and vice versa.

The paper's objectives are twofold. For practical purposes, the analysis would help in identifying the target groups (or segments) for communications and would inform how to customize the message for each group based on the relevant service characteristics. In terms of theoretical contribution, the results could corroborate or refute some of the findings from the few earlier studies that employed configurational logic to innovation adoption. The remainder of the paper consists of the following parts. The theoretical framework, which covers literature on innovation adoption as well as the use of configurational logic for its analysis, is laid first. It is followed by a detailed description of the methodological approach used in the study. Finally, the findings of the analysis are presented and their implications and limitations are discussed.

## **3.2 THEORETICAL FRAMEWORK**

### **3.2.1 Consumer innovation adoption and its antecedents**

The interest in the processes that precede and, more importantly, determine the purchase of a product has played a central role in the development of consumer behavior studies (Ajzen, 2008). It has been especially the case for new products and services, conceptually defined as innovations. Major theories that tried to explain innovation adoption behaviors of consumers appeared in the 1960s and 1970s. The most notable ones are the diffusion theory of Rogers, the technology acceptance model of Davis, the theory of planned behavior of Ajzen, the theory of

reasoned action of Ajzen and Fishbein, the theory of interpersonal behavior of Triandis and the subjective probability model of Jaccard and King (Arts et al., 2011; Davis & Warshaw, 1992). These theories have been typically developed and tested through research on durable goods (Ordanini, Parasuraman, & Rubera, 2014). More recently, the focus of studies has shifted towards innovative technological products, including non-tangible software solutions and digital services (C.-D. Chen, Fan, & Farn, 2007; Featherman & Pavlou, 2003; Pedersen, 2005; Shareef, Jumar, Kumar, & Dwivedi, 2011) as well as environmentally friendly products (Arkesteijn & Oerlemans, 2005; Gonçalves, Lourenço, & Silva, 2016; Plötz, Schneider, Globisch, & Dütschke, 2014). Adoption of new non-digital services have been generally neglected in consumer behavior research, with some notable exceptions (see Ordanini et al., 2014).

Rogers (2003) defined *innovation adoption* as the decision of an individual to make full use of an innovation, or in market terms, to purchase and consume a product or a service. From a marketer's perspective, however, the case of new products often necessitates the understanding of determinants of behavior even before the product hits the market or before it is even developed. Rogers (2003) as well as other innovation scholars (Hall, Loucks, Rutherford, & Newlove, 1975) acknowledged that the adoption process is complex and consists of several stages and decision points, including those occurring before the first purchase and others afterwards. Pre-purchase decision points have been commonly used as alternatives to the act of purchase when considering new products and services. As Arts et al. (2011) noted in their meta-analysis of studies on consumer innovation adoption, by using the term 'innovation adoption', researchers have been mixing constructs that measure actual purchase *behavior* and *intention* of a purchase (especially in cases of hypothetical products).

Purchase intention has been observed to have relatively strong predicting power for actual behavior with correlations between the two varying between 0.45 and 0.62 (Ajzen, 2008). By applying several experiments, Davis and Warshaw (1992) reviewed the concept of '*behavioral intention*' and concluded that the majority of intention scales, in fact, measure '*behavioral expectation*'. According to the authors, the two concepts differ in their underlying processes and in the way, they affect the future behavior that researchers try to predict. While behavioral intention reflects the conscious plans of performing a behavior (e.g., purchasing a product), behavioral expectation is defined as the individual's perceived likelihood of

performing a behavior (ibid). Wright and MacRae (2007) also pointed out the differences between purchase intention and *purchase probability*. The authors concluded that the latter construct has better content validity and leads to more accurate predictions, presumably because of its flexibility in incorporating contextual factors that affect the purchase. Such assumption resonates well with the recognition of *fortuity*, or factors outside of the control of an individual, in its strong influence on human behavior (Bandura, 2006). Another pre-purchase stage of innovation adoption that have been used in research is *product interest*. It has been shown to directly influence purchase behavior of consumers (De Pelsmacker & Janssens, 2007), thus can be considered a precursor to adoption behavior.

As the meta-analysis of Arts et al. (2011) has shown, behavioral intention is still used most commonly as the closest predictor for actual behavior. It is conceptualized as a mediator between consumer attitudes and consumer actions (Ajzen, 2008), and as such, it can be considered as an outcome of certain antecedents that influence its formation. Arts et al. (2011) identified over 200 variables used by scholars to explain adoption intention or adoption behavior. The authors divided them into two categories – innovation characteristics and adopter characteristics. The most widespread innovation characteristics included relative advantage, compatibility, complexity, trialability, observability, and uncertainty. The adopter- or consumer characteristics were further divided into socio-demographics, such as age, education, income, and psychographics – innovativeness, product involvement, opinion leaderships and media proneness (Arts et al., 2011).

### 3.2.2 Innovation characteristics affecting innovation adoption

Multiple studies have found that innovation adoption is preceded by the attitudes of adopters towards the innovation itself (Flight et al., 2011), also described as perceived innovation characteristics. Some of them have been introduced by Rogers already in the 1960s, namely *relative advantage*, *complexity*, *compatibility*, *trialability*, and *observability*, while *perceived risk* or *uncertainty* were proposed later (Flight et al., 2011; Ordanini et al., 2014). Arts et al. (2011) grouped innovation characteristics into two groups – benefits and costs. The first group, benefits, refers to the abstract ‘why’ aspects that reflect the desirability of adoption behavior. Since desirability increases when the innovation is perceived to be advantageous and compatible with the individual’s needs, relative advantage and compatibility are the two main benefits that a new product may entail. *Relative advantage* is defined as



the degree in which the adopter will gain or benefit from the offering as compared to its alternatives. It covers physical and technical attributes of the innovation as well as the economic advantage – the cost savings that may occur as a result of adoption (Flight et al., 2011; Gatignon & Robertson, 1985, as cited in Ordanini et al., 2014). *Compatibility* describes the extent to which the offering fits the adopter's personal and social structure, its consistency with the person's values, past experiences and lifestyle (Arts et al., 2011; Flight et al., 2011). *Trialability* is conceptualized as the degree to which the innovation may be tried on a limited basis, while *observability* – as the degree to which the use of an innovation is visible to others (Hirschman, 1980). The latter two characteristics enable the potential adopter to assess the benefits of an offering (Arts et al., 2011), and together they enable the flow of information about the innovation (Flight et al., 2011).

The remaining two innovation characteristics – complexity and uncertainty – are ascribed by Arts et al. (2011) to 'costs', or the 'how' aspects of behavior. *Complexity* is defined as the degree to which the innovation is perceived to be difficult to understand and use (Flight et al., 2011). Arts et al. (2011) have found that complexity plays a more crucial role for durable products than for non-durables and influences behavioral intention and purchase behavior differently. More specifically, it was observed to have a positive effect on adoption intentions or consumer considerations distant in time from actual behavior, presumably due to igniting product interest, but a negative effect on actual purchase behavior, thus playing a critical role immediately prior to the acts of purchase. According to Flight et al. (2011), complexity leads to perceived risk and uncertainty of consumers. *Uncertainty* is generally defined as the degree to which the consequences of purchasing and using an innovation cannot be established, and as such, it affects innovation adoption negatively (Arts et al., 2011). It is important to note that not all authors agree on the clear negative effects of uncertainty and risk on consumer behavior, and there is a level of ambiguity on the conceptual and even semantic nature of the term 'uncertainty' in consumer behavior scholarship (Zins, 2002). Depending on its source, uncertainty is divided into product uncertainty and seller uncertainty (Dimoka, Hong, & Pavlou, 2012). Product uncertainty can be further specified in terms of description uncertainty, performance uncertainty, symbolic uncertainty and switching-cost uncertainty, and the importance of each has been presumed to be dependent on the temporal dimension of adoption (Castaño, Suján, Kacker, & Suján, 2008; Dimoka et al., 2012).

Other innovation characteristics that have been used in innovation adoption research less frequently are novelty (Ordanini et al., 2014), social advantage, volition, discontinuity, and customization (Flight et al., 2011). Ordanini et al. (2014) proposed that the *level of required co-production* is another attribute that should be considered for services, given their interactive and experiential nature. The application of the theory of consumption values is another approach that has been used to study the influence of consumer attitudes towards products and services on their adoption (Gonçalves et al., 2016; P.-C. Lin & Huang, 2012). The theory, introduced in 1991 by Sheth, Newman, and Gross, proposed that consumer behavior is a function of five independent consumption values – functional (the perceived utility of an offering related to its performance), social (the social approval and self-esteem improvement as a result of the consumption), emotional (the feelings and affective states provoked by consumption of the product), conditional (the perceived utility relative to the context of consumption), and epistemic (the value of the consumption in stimulating desire for knowledge). The point of departure of the theory of consumption values is that consumers should not be considered only as economically rational but together with their feelings and fantasies (Hedman & Gimpel, 2010).

All the innovation characteristics discussed above are measured from the perspective of the user and thus can be conceptualized as individual attitudes towards a product. Ajzen (2008) warned about the gap that exists between attitudes and behavior and called for caution when using attitudes as predictors of behavior. To decrease this gap, he suggested measuring attitudes at a level compatible with the purchasing situation in terms of the target, action, context and time elements. Behaviors that are more distant in time and lack specificity are influenced by abstract considerations, while immediate and specific ones – by context-dependent concerns. This postulate could explain why Arts et al. (2011) concluded that complexity and trialability have a significantly smaller effect on innovation adoption intentions than uncertainty, compatibility and perceived relative advantage.

### 3.2.3 Consumer characteristics affecting innovation adoption

Another approach to explaining innovation adoption is through the individual differences and traits of the consumers or adopters. It entails an investigation of the effects of one or more consumer traits on innovation adoption (Im, Bayus, &

Mason, 2003; H. Lee, Jeong Cho, Xu, & Fairhurst, 2010; Manning, Bearden, & Madden, 1995; Spake & Megehee, 2010; Stock & Schulz, 2015; Wang, Dou, & Zhou, 2008) or their incorporation as moderating factors influencing the effect of innovation characteristics (Cham, Ng, Lim, & Cheng, 2018; Roy, Balaji, Quazi, & Quaddus, 2018; Yang, 2012). While marketers are not able to change consumers' characteristics, they can address them and thus increase the likelihood of product adoption (Stock & Schulz, 2015). Arts et al. (2011) divided adopter characteristics into two main groups – socio-demographics and psychographics. In their meta-analysis, they concluded that sociographic characteristics, such as age, level of education, and income, do not have a generalizable impact on adoption behavior. Among psychographics, involvement and consumer innovativeness were shown to have a strong positive effect on adoption of innovations, while opinion leadership, information seeking, and media proneness, had weaker or non-significant effects. Yalcinkaya (2008) proposed that innovation diffusion is influenced by cultural traits, illustrated by Hofstede's five dimensions, but these propositions have not been tested.

*Innovativeness*, more specifically consumer innovativeness, has been one of the most studied consumer characteristics hypothesized to influence product and innovation adoption (Roehrich, 2004). Scholars observed that some consumers are more likely to adopt new products than others and that their behavior cannot be described purely as purposeful but rather as exploratory (Steenkamp & Baumgartner, 1995). Consumer innovativeness is defined as the general predisposition of a consumer to buy new and different products rather than remain with previous choices (Arts et al., 2011; Roehrich, 2004). As a trait that varies among humans, it has been often applied to distinguish early adopters from other consumers (Hirunyawipada & Paswan, 2006). Roehrich (2004) identified four explanations for the role of innovativeness in innovation adoptions proposed in literature: 1) innovative behavior helps maintain inner stimulation at an optimum level; 2) innovative behavior is an expression of innate novelty seeking; 3) innovative behavior is an expression of independence of others' communicated experience; 4) innovative behavior aims at satisfying the need of uniqueness. Hirunyawipada and Paswan (2006) presented a hierarchical multilevel structure of consumer innovativeness and showed that at each level consumer innovativeness affects innovation adoption in different ways. According to the authors, while global innovativeness denotes a general personality trait which is context-free, domain-specific innovativeness captures the individual's personal predisposition to a

certain product class (i.e. product class involvement), and actualized innovativeness is situational and describes the extent to which consumer is early in innovation adoption (ibid).

*Product involvement* has also been widely described as a factor significantly affecting consumer behavior and particularly innovation adoption (Te'eni - Harari & Hornik, 2010). It is agreed that product involvement reflects a certain level of centrality of products in the lives of consumers, but Bloch (1981) observed variability in defining the concept in literature. Among others, product involvement has been conceptualized as the extent of interest and enthusiasm towards specific products (Goldsmith & Emmert, 1991), as a state of arousal (Richins & Bloch, 1986), as the degree of differentiation, familiarity, importance and commitment (Arts et al., 2011). More importantly, there have been differences in identifying the object of involvement – while typically it is referred to a whole class of products, or a product category (Arts et al., 2011; Goldsmith & Emmert, 1991), in some contexts it has been used in regards to specific brands (see for example Quester & Lin Lim, 2003). A classification has been introduced through the temporal dimension of product involvement. A temporary concern for a product, which ends right after or shortly after the purchase has happened, has been referred to as situational product involvement (L. Lin & Chen, 2006). Enduring involvement represents an ongoing concern that is rather stable and only changes over substantial periods of time, as it is based on the individual's personal appreciation system and past experiences with the product (Houston & Rothschild, 1978, as cited in L. Lin & Chen, 2006). Richins and Bloch (1986) noted that for an individual, only a few products would induce enduring involvement.

Other psychographic consumer characteristics, such as opinion leadership, information seeking, and media proneness, as well as technological affinity, brand proneness, and price consciousness (Stock & Schulz, 2015) received less attention in literature. While not touching upon innovation adoption specifically, Spake and Megehee (2010) studied the influence of consumer sociability on the relationships between consumers and service providers. *Sociability* has been defined as the preference of people to be with others and engage in relationships (Cheek & Buss, 1981). Spake and Megehee (2010) noted that the construct of sociability has been well established in marketing literature in terms of the characteristics of the service providers but not as a consumer characteristic. In their study, the authors found that it significantly affects commitment, which itself

has been seen as an important factor for customer retention. It becomes plausible to assume that sociable people are more likely to participate in services that involve social contact and fulfill social needs, yet this relationship has stayed unexplored.

### 3.2.4 Configurational model of innovation adoption

Studies on consumer innovation adoption have traditionally assumed an additive influence of the various innovation or consumer characteristics. Following this line, scholars employed linear models and correlational approaches to identify a permanent mechanism that explains the causal process. More recently, some authors (Gonçalves et al., 2016; Ordanini et al., 2014) suggested that the impacts of the various factors affecting innovation adoption are not independent but contingent on the presence or absence of other factors. The idea that the configuration of factors plays a more important role than their sum (Ordanini et al., 2014) also implies the existence of several configurations, or in other words, a typology (Miller, 1996) of innovation adoption, which may better reflect the complex nature of consumer behavior (Stock & Schulz, 2015). Stock and Schulz (2015) applied cluster analysis to identify patterns underlining various types of technological innovation adopters based on their traits. While this study discovered different consumer types, the applied method did not allow for a pure configurational approach, one that allows for the same attribute to cause either the presence or the absence of an outcome depending on the values of the other attributes (Ordanini et al., 2014).

Other researchers proposed the use of Qualitative Comparative Analysis, or QCA. QCA is a cross-case comparative method based on set theory and Boolean algebra (Berg-Schlosser, De Meur, Rihoux, & Ragin, 2009; Gerrits & Verweij, 2013; Wagemann, 2017). It empirically examines the relationships between an outcome variable and all possible combinations of its antecedents, both conceptualized through binary states representing the absence or presence of a condition or of the outcome (Ordanini et al., 2014). It is important to note that QCA is not only a data analysis technique but also a research approach, and thus not only it is compatible with configurational logic, but it also allows for new ways of looking at innovation adoption, namely through the lens of set relations (C. Q. Schneider & Wagemann, 2013). Gonçalves et al. (2016) conducted a QCA analysis with five consumption values as conditions and green buying behavior as the outcome and found six combinations of consumption values that all lead to green purchasing. Ordanini et al. (2014) assessed different configurations of four perceived service

characteristics at two co-production levels on the service adoption and found three sufficient configurations that stimulate adoption of a luxury hotel service. An extensive literature review did not identify configurations that include both consumer traits and innovation features reported in the literature.

### **3.3 METHODOLOGY**

#### **3.3.1 Research paradigm**

Despite all the progress in research on innovation and product adoption, scholars have not succeeded at producing a deterministic model that would result in negligible variance in its predictability. This outcome reflects the complexity of systems and processes engaged when choosing to adopt or not to adopt a new product or service. Several generalizable antecedents have been found to affect adoption, but the influence of contextual conditions in situations of actual purchasing behavior is very strong. Such complexity is a result of the interconnectedness of open systems that comprise social life as well as their interactions that create social structure (Gerrits & Verweij, 2013). Critical realism is a paradigm that assumes that mechanisms of consumer behavior, as other phenomena studied by social science, exist outside of human perception as complex configurations that at a given time and a given place result in a certain outcome (Byrne, 2005; Gerrits & Verweij, 2013). This complex reality may be uncovered partially, through the means of scientific research (Danermark et al., 2001).

#### **3.3.2 Research design**

**Qualitative comparative analysis.** Qualitative Comparative Analysis (QCA) is a research approach compatible with configurational logic and critical realism, as it aligns a configurative ontology and an epistemology that defines causality as asymmetric (Wagemann, 2017; Woodside, 2010). It has a strong focus on contingency, or the dynamic activation of causal mechanisms by certain configurations of antecedents (Gerrits & Verweij, 2013). Just as critical realism, QCA rejects reductionism – it is performed as a continued move between theory and data, as a combination of inductive and deductive thinking in one method (Wagemann, 2017). It combines case-oriented and variable-oriented approaches of inquiry (Ragin, 1987, as cited in Gerrits & Verweij, 2013). Variables within QCA are known as *conditions* or exogenous factors (Thiem, 2017), and they represent certain properties of a phenomenon. Cases are specific combinations

(configurations) of conditions that result in a certain outcome of interest (Berg-Schlosser et al., 2009). The selection of conditions for a specific outcome must be rooted in theory (Berg-Schlosser & De Meur, 2009)

As a set-theoretic approach, QCA was designed to work with dichotomous (binary) conditions, where 1 corresponds to full membership of a case in a condition and 0 – to full non-membership (Wagemann, 2017). Once the memberships in all conditions are set, all possible logical configurations of conditions are listed in a *truth table*, which is then analyzed through the empirically observed cases using Boolean logic (Gerrits & Verweij, 2013). This does not mean that variables in QCA have to be strictly dichotomous. The incorporation of fuzzy sets into QCA allowed to capture gradations of set memberships, or in others words, differences-in-degree of the conditions, as long as the concepts represented by the conditions are dichotomous in principle (C. Q. Schneider & Wagemann, 2013). Designs with strictly dichotomous conditions are known today as crisp-set QCA (csQCA), while those that use fuzzy logic – as fuzzy-set QCA (fsQCA). The two can be combined, because crisp sets can be considered as a special case of fuzzy sets with only two possible (extreme) values.

Truth tables are used to reduce the sets into interpretable solutions, or in other words, non-redundant condition configurations (Thiem, 2017). QCA analysis is particularly powerful in its ability to identify necessary and sufficient conditions (or logical conjunctions of conditions) for an outcome. *Necessary* conditions are those conditions that are always present when the outcome is present and always absent when the outcome is absent. A condition is *sufficient*, if the outcome is always present, when the causal condition is present (C. Q. Schneider & Wagemann, 2013; Wagemann, 2017). While C. Q. Schneider and Wagemann (2013) recommended testing for simple necessary conditions at the start of the analysis, prior to the truth table minimization, Thiem and Baumgartner (2016) warned against the pitfalls related to this procedure and advised not to interpret simple necessary conditions as causal factors.

When conducting fsQCA with real-world data, perfect matches between conditions and outcomes for identifying necessary and sufficient conditions are hardly attainable. As a result, two important parameters of fit have been proposed – consistency and coverage. *Consistency* measures indicate the extent to which the empirically observed cases conform the subset relation of sufficiency – for

sufficient conditions, or necessity – for necessary conditions. *Coverage* parameters express the empirical importance for sufficiency and the relevance (or non-trivialness) for necessity (C. Q. Schneider & Wagemann, 2013). While based on very different assumptions and underlying logic, consistency values may be considered as analogous to correlation (Woodside, 2010) and coverage – to the  $R^2$  value found in statistical methods (Wagemann, 2017). C. Q. Schneider and Wagemann (2013) described detailed formulae for calculating each of these parameters for both crisp- and fuzzy-set QCA. The same formulae have been incorporated into the main software packages used for conducting QCA analysis (Dusa, 2019; Thiem, 2018).

While QCA has been originally developed and employed for small- and medium-sized datasets, some researchers pointed to the potential of the approach in studies involving a large number (more than 50) of cases (Greckhamer, Misangyi, Elms, & Lacey, 2008; Greckhamer, Misangyi, & Fiss, 2013), including survey-based designs (Emmenegger, Schraf, & Walter, 2014; Ordanini et al., 2014). Here, it is important to note that moving from small-N to large-N studies often translates into applying QCA as a data analysis technique rather than a research approach. As a case study approach, QCA has been developed on the base of a close relationship between the researcher and the cases, and the iterative process of collecting and analyzing data has been described as a “back-and-forth” movement between ideas and evidence (Ragin 1994, as cited in Ragin, 2008). In fact, assuring validity within the approach often relies on returning back to the cases, collecting more data on them, adding conditions, or re-specifying definitions, populations, and outcomes (C. Q. Schneider & Wagemann, 2013). As in large-N studies returning to cases is typically unfeasible – either because of their high number or because of the inability to ask additional questions to anonymous survey respondents, – Greckhamer et al. (2013) proposed a number of other considerations for QCA with a large number of cases. Emmenegger et al. (2014) stressed the importance of calibration and robustness checks in this context.

Despite the certain limitations of QCA studies with large-N datasets, there are good reasons for applying it instead of the more common statistical methods. Specifically, the number of analyzed cases does not affect QCA’s ability to assume complex causality, equifinality and asymmetric causal relations. QCA and set theory in general are closely linked to conjectural (or complex) causality (C. Q. Schneider & Wagemann, 2013), which allows to focus on how causes combine to bring an



outcome rather than on their net effects (Greckhamer et al., 2013). Equifinality means that the same outcome may be produced by different alternative combinations of causes, while asymmetry of causal relations means that the outcome and its complement (i.e. the absence of the outcome, or its negation) have to be explained separately, potentially through different explanatory factors (Wagemann, 2017). Traditional statistical methods are not able to capture these assumptions.

Based on the considerations discussed above, QCA is deemed an appropriate and insightful method to capture the complexity of consumer behavior in regard to new product adoption. It has been previously applied in this context (Gonçalves et al., 2016; Ordanini et al., 2014), and given that it is not always appropriate to compare QCA findings with those of statistical methods (Wagemann, 2017), increasing the body of knowledge on innovation adoption based on configurational approaches can provide a better understanding of the phenomenon. While QCA originated in political studies and sociology, it is receiving an increasing interest from business scholars (Wagemann, Buche, & Siewert, 2016). Its use in marketing and tourism studies have been recommended by Woodside (2010, 2011), and it is illustrated by a significant number of scholarly works (Martin & Woodside, 2011; Navarro, Llinares, & Garzon, 2016; Papatheodorou & Pappas, 2017; M. R. Schneider & Eggert, 2014; Woodside, Hsu, & Marshall, 2011; Woodside, Prentice, & Larsen, 2015). For the current study, data was collected through the means of two surveys – one administered to a sample of persons with VI and the other one – to a general sample of people without VI. The questionnaire items were developed to be compatible with QCA logic (i.e. dichotomous in principle). The detailed procedures are described below.

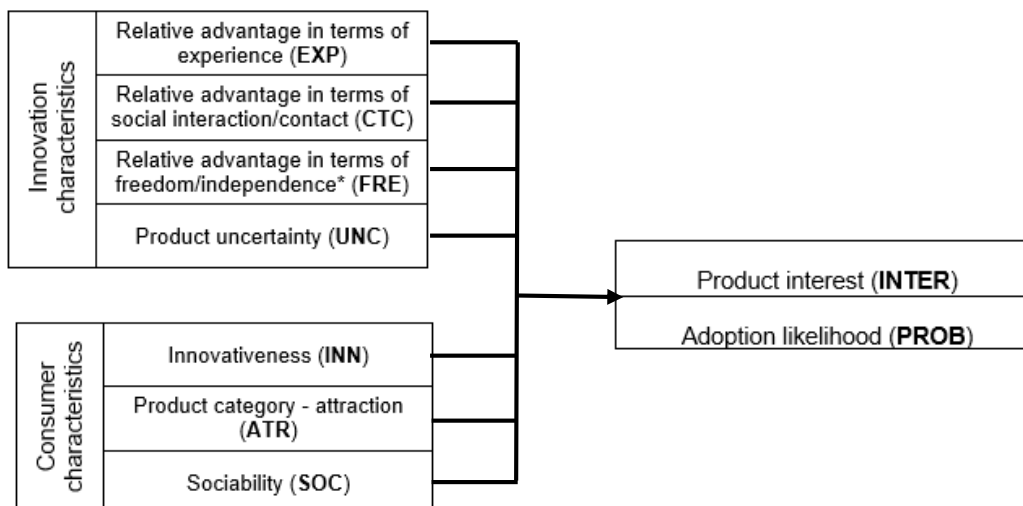
***Specification of outcome, conditions, cases.*** The choice of conditions expected to have an impact on a selected outcome is crucial. For considering innovation adoption, previous research emphasized that the selection and measurement of consumer and innovation characteristics has to be compatible with the level of the measured aspect of innovation adoption. More specifically, the attributes (characteristics) and innovation adoption (adoption intention, interest or behavior) need to align in terms of the action, context, target and the temporal dimension (Ajzen, 2008; Arts et al., 2011). To capture adoption intention of an intangible product, an inclusive holiday, that can be described as an innovation to the vast majority of people, who have not had the experience of consuming it or observing

it, two distinct constructs were chosen – interest in the concept of inclusive holidays (*product interest*, INTER) and expressed likelihood of participating in inclusive holidays (*adoption likelihood*, PROB). Membership in the set of product interest would correspond to expressing an interest in participation (an attitude towards the product), while non-membership – the absence of interest. Membership in the set of expressed adoption likelihood would correspond to expressing an expectation of consuming an inclusive holiday in the near future versus non-expectation. Choosing two constructs was due to the literature suggesting conceptual differences between attitudes and behaviors and the crucial role of situational factors in influencing the latter ones.

The causal conditions were specified as variables related to innovation- and consumer characteristics. These had to be carefully selected in order to avoid excessive questionnaire length and a workable number of possible condition combinations. The literature review presented earlier in the paper and the findings of qualitative interviews conducted with participants and non-participants of inclusive holidays (presented in *Paper 1*) served as a base for this informed selection. *Innovativeness* (INN, persons belonging to a set of persons who express their innovativeness versus those who do not), *product involvement* in terms of travel (ATR, persons belonging to a set of persons who express interest and enthusiasm in traveling versus those who do not), and *sociability* (SOC, persons belonging to a set of persons expressing their sociability versus those who do not) were chosen as consumer characteristics most relevant in influencing adoption of inclusive holidays both for persons with and without VI. As many persons without VI expressed altruistic reasons for participating in inclusive holidays, akin to volunteer tourists (Brown, 2005; Clary et al., 1998; Wearing & McGehee, 2013), *altruism* was measured as a variable for this group. In a similar way, *community participation* was added as a variable only for persons with VI, as interviews hinted that participants of inclusive holidays are more involved in their communities than non-participants. However, as both altruism and community participation were difficult to be interpreted in set-theoretic terms, they were excluded from the subsequent QCA analyses.

As for product characteristics, *relative advantage* and *product uncertainty* were selected as the two most influential innovation aspects, according to the reviewed literature. Relative advantage was further specified through three aspects, identified through the qualitative interviews, – in terms of the *social interaction*

(CTC), *depth of experience* (EXP), and *freedom* (FRE). It is important to note that the product characteristics were measured as perceived attitudes towards the product rather than objective features. In set-theoretic terms, uncertainty (UNC) can be described as membership in the set of persons who perceive uncertainty related to participating in an inclusive holiday, relative advantage in terms of social interaction – in the set of person who perceive that inclusive holidays provide a more socially interactive experience than other available leisure options, relative advantage in terms of depth of experience – in the set of persons who perceive that inclusive holidays provide a more outstanding experience than other available leisure options, and relative advantage in terms of freedom – in the set of persons who perceive that inclusive holidays provide more independence than other available leisure options. The conditions and the outcomes used for the QCA analyses are presented visually in Figure 4.



\* Only considered for the sample of persons with VI

Figure 4. The conditions and outcomes used for the QCA analyses

In QCA, the selection of cases should be based on theoretical considerations (C. Q. Schneider & Wagemann, 2013). For the current study, the cases comprised potential product adopters or customers. As there are two main groups of customers targeted by providers of inclusive holidays – persons with VI and persons without VI, – two groups of cases were identified for two distinct QCAs corresponding to the two target groups. The selection of cases was not random but rather aimed at covering a wide diversity of configurations, thus a survey was considered as an appropriate method for data collection. The population of cases

was defined as Internet-users, since inclusive holiday providers communicate with their customers predominantly through online channels. No other limitations, other than having a severe form of VI (low vision, near-total or total VI) for the first group and not having a severe form of VI for the second group, were set on the population.

### 3.3.3 Data collection

**Survey design and construct measurement.** The data collection process targeted two groups of potential users of inclusive holidays within the broader German-speaking European population – persons with and without VI. Each of the groups was addressed with a questionnaire that measured the adoption of inclusive holidays and several adoption antecedent variables. To present the concept of inclusive holidays, a short textual description was provided to survey respondents. The 11-sentence-long text (Appendix 4) was based on existing marketing communications from organizations offering such holidays. It described the general conduct of holidays and their difference from traditional package holidays. The text presented a product concept without any reference to an organization offering it or pricing information. *Product interest* was measured as the response on a unipolar five-point scale (where 1 is “Extremely interested” and 5 is “Not interested at all”) to the question “How interested would you be in participating in this holiday concept?” *Adoption likelihood* was measured as the response on a unipolar five-point scale (from “Certainly” to “Under no circumstances”) to the question “If the holiday concept was available to you for booking, what is the likelihood that you will book one in the next two years?”

Existing scales and measurement instruments for the chosen variables (conditions) representing consumer characteristics and perceived innovation characteristics were adapted for measurement in this study. The selection and adaptation of scales was aimed at fulfilling compatibility between the levels of adoption measured (i.e. product interest and distant adoption likelihood) and the relevant characteristics. Along these lines, consumer *innovativeness* was measured with the short version of the Change Seeker Index (CSI) validated by Steenkamp and Baumgartner (1995). CSI measures optimum stimulation level, which reflects the tendency of consumers to engage in exploratory behavior – a level of innovativeness compatible with the general evaluation of a new concept of inclusive holidays. Statements from the Consumer Involvement Profile by Laurent and Kapferer (1985) that measure the attraction dimension of product category involvement were adapted to capture *product involvement*. This scale has been

used previously in tourism research (Gross & Brown, 2006; Kyle, Graefe, Manning, & Bacon, 2003). In this study, the attraction dimension of product category involvement reflected the importance and pleasure that consumers see in travelling in general. *Sociability* was measured through the instrument adapted by Spake and Megehee (2010) from earlier studies. *Altruism* was measured with a two-item instrument proposed by Paek and Nelson (2009). The measurement of all these constructs was formatted as the level of agreement on a five-point scale (from “Strongly agree” to “Strongly disagree”) to a list of grouped statements. *Community participation* was measured through the indication of the frequency of engaging in activities formulated through an adaptation of the Maastricht Social Participation Profile (Mars et al., 2009).

*Product uncertainty* was measured as an agreement response to a statement based on the scale used by Dimoka et al. (2012). In order to specify the construct of relative advantage, it was measured through statements reflecting different types of value that were captured through qualitative interviews. All survey participants were asked to assess the relative advantage provided by inclusive holidays in terms of the *social interaction* and *depth of experience* (“more outstanding experience than other forms of holiday travel”). Persons with VI were also asked to assess whether they perceive more independence and *freedom* provided by inclusive holidays as compared to other forms of holiday travel. In addition, basic demographic data (gender, age, education, country of residence and type of residence – urban or suburban), information about previous experience in inclusive holidays, presence of additional impairments (for respondents with VI) and close social contacts with persons with disability (for respondents without VI) were collected.

The questionnaire and the accompanying text were first drafted in English and then translated into German by a native German-speaking academic in close collaboration with the author. It was further pre-tested and reviewed by two other German-speaking academic staff as well as a representative of an organization for the interests of persons with VI (*Hilfsgemeinschaft der Blinden und Sehschwachen Österreichs* [Support community of the blind and visually impaired in Austria]), and their feedback was incorporated. The questionnaire targeting persons without VI was additionally reviewed by two anonymous reviewers recruited by the provider of the SoSci Panel (Leiner, 2016). As some of the targeted respondents had severe forms of VI, special consideration was given to formatting the questionnaire in an

accessible way. For this, guidelines by Kaczmirek and Wolff (2007) were followed. The questionnaire targeting persons with VI was formatted electronically using the *SurveyMonkey* platform that offers a technological solution accessible to common screen readers used by persons with blindness and severe VI. The questionnaire targeting persons without VI was formatted and administered through the *SoSci Survey* software. The questionnaires and the data collection procedures for this study were approved by the Modul University Vienna Institutional Review Board in June 2018.

***Sampling and data collection - survey targeting persons with VI.*** The digital link leading to the questionnaire targeting persons with VI was distributed through self-help organizations for persons with blindness and VI in Austria, Germany and Switzerland. Given the important role that such organizations play in the lives of people with VI (American Foundation for the Blind, n.d.), they unite the predominant majority of people living with VI in these countries. All such regional organizations in these countries were requested to distribute the link among their members through their regular newsletters. Unfortunately, it was not possible to track the number of people that this invitation was sent out to in order to calculate a response rate. A control question in the questionnaire was used to make sure that the survey participants have a severe form of VI.

Through the survey, 144 full responses were collected, including 43% from Switzerland, 33% from Germany and the remaining 24% from Austria. The gender split was almost even (females comprised 54%). Almost a third of the respondents reported having higher education. More than half of the sample reported residing in urban areas (57%), while 31% – in rural, and 12% – in suburban. In terms of the degree of VI, 42% reported themselves as blind. The average age of survey participants was 51. While the demographic values indicate a rather diverse group of participants, the sample cannot be considered representative, which is acknowledged in the limitations of the study.

***Sampling and data collection – survey targeting persons without VI.*** The SoSci Panel non-commercial convenience pool ran by the Department of Media and Communication (IfKW) at Ludwig Maximilian University of Munich (Leiner, 2016) was used to recruit German-speaking respondents without VI. A control question in the questionnaire was used to make sure that the survey participants had no VI beyond forms that are correctable through glasses or contact lenses.

The final sample consisted of 517 respondents, 84% of them residing in Germany, 9% – in Austria, 5% – Switzerland, 2% – in other countries. More than half of the sample was comprised of respondents reporting themselves as female (59%). Two-thirds (67%) reported to have higher education. Slightly fewer participants (64%) indicated their residence as urban, 25% – as rural, 11% – as suburban. The average age of the sample was 43 years. Similar to the sample of persons with VI, the current sample cannot be considered representative of the total population.

### 3.3.4 Data analysis

The QCA procedures were conducted using the capabilities of the *RStudio* open-source integrated development environment for *R* statistical programming language. Several specialized packages developed for QCA were used, most notably the *QCA* (Dusa, 2019), *SetMethods* (Oana, Medzihorsky, Quaranta, & Schneider, 2018), and *QCApro* (Thiem, 2018) packages.

**Calibration.** In order to commence the analysis, the raw data collected through the surveys had to be calibrated, or in other words, the continuous values had to be transformed into factors, whose levels provide a basis for interpreting the measurement (Ragin, 2008; Thiem, 2017). Technically, this means assigning the measurement points that correspond to full membership in a set (=1), full non-membership (=0), and the point of indifference (=0.5) – at which cases are more ‘in’ in a given set than ‘out’ (Ragin, 2008). As some of the variables of interest were measured by several items, it was also necessary first to aggregate them. Emmenegger et al., (2014) warned that using averages of Likert-scale values goes against set-theoretic logic and suggested using theoretical knowledge for combining measurements. Having this warning in mind, it was nevertheless decided to opt for averaging as the aggregation method, given the lack of theoretical support provided by the developers of the measurement scales that could inform a set-theoretic aggregation. The values of INN, ATR, and SOC, were calculated as the simple averages of the items corresponding to measuring each. As a result, these three variables obtained a value on a continuous scale, as opposed to the discrete values of the other variables, which were measured directly with Likert-scales.

Ragin (2008) emphasized the importance of using the researcher’s substantive and theoretical knowledge as the basis of calibration. The review of the theoretical concepts measured in this study concluded that there is a lack of theoretical

grounding for qualitative interpretations of the various levels of concept measurement. For example, while the scales measuring consumer innovativeness have been validated across many samples, there has been no discussion about the measurement value at which consumers can be regarded as innovative or at which level – not innovative. The same was true for the other measured concepts. Despite this theoretical shortfall existing for many social concepts, Emmenegger et al., (2014) suggested that Likert scales are well-compatible with set-theoretic approaches. The variables directly measured through Likert agreement scales – UNC, CTC, EXP and FRE – were calibrated using the indirect calibration method (Ragin, 2008) following the suggestions of Emmenegger et al. (2014). Most importantly, only those respondents were attributed to full set membership that agreed with the statement (“agree somewhat” or “agree strongly”). The detailed calibration of all the conditions is presented in Table 5.

Table 5. Calibration of the conditions and outcomes variables for the fsQCA

Calibration for UNC, CTC, EXP, FRE		Calibration for SOC, INN, ATR		Calibration for INTER		Calibration for PROB	
<i>Measured value</i>	<i>Fuzzy value</i>	<i>Measured value</i>	<i>Fuzzy value</i>	<i>Measured value</i>	<i>Fuzzy value</i>	<i>Measured value</i>	<i>Fuzzy value</i>
“strongly agree”	1	4	Full membership threshold	“very strongly interested”	1	“almost certainly”	1
“somewhat agree”	0.8			“strongly interested”	0.8	“highly likely”	0.75
“neither agree, nor disagree”	0.2	3.5	Crossover point	“moderately interested”	0.7	“probably”	0.6
“somewhat disagree”	0	2	Non-membership threshold	“somewhat interested”	0.6	“unlikely”	0.2
“strongly disagree”	0			“not interested at all”	0	“almost certainly not”	0

The variables INTER and PROB were measured with different scales and thus necessitated different calibration approaches. The corresponding fuzzy values, also indicated in Table 5, were chosen to reflect the qualitative anchors of the scales as close as possible. As for SOC, INN, ATR, indirect calibration was not



possible, given the continued values for these aggregated variables. For direct calibration, three qualitative anchors were established – thresholds for full membership and full non-membership as well as the crossover point, also known as the point of maximum ambiguity (Ragin, 2008). The dataset was checked in order to make sure that no cases coincide with the crossover point ( $=0.5$ ), which would make them unusable for the QCA. It is important to note that in line with QCA best practice (C. Q. Schneider & Wagemann, 2010), the calibration was not performed based on characteristics of the collected data, such as observed mean or median values, but rather on theoretical considerations. Same procedures were employed for both datasets – collected from persons with and without VI.

**Calculation of solutions.** Separate analyses were conducted for both samples and separately for the absence and for the presence of the two outcomes – product interest (INTER) and adoption likelihood (PROB). Applying the SuperSubset procedure integrated in the QCA R package (Dusa, 2019) did not identify any single conditions, condition conjunctions or theoretically interpretable condition disjunctions that could be deemed necessary for the outcome. The outcomes for the sample of persons with VI were being explained through seven variables, thus the property space for each analysis consisted of  $2^7 = 128$  possible configurations. The condition FRE was not used in the analyses for the sample of persons without VI (given difficulties of its interpretation in this context), thus the property space here only consisted of  $2^6 = 64$  configurations. Although the number of cases in each sample was above these figures, the truth tables generated by using the QCApro R package (Thiem, 2018) indicated a high number of configurations that were not supported by empirical evidence in the collected data. Given this situation of limited empirical diversity, the so-called parsimonious search strategy was pursued to identify the causally interpretable solution models consisting of sufficient conditions for the outcomes. Based on simulations, M. Baumgartner and Thiem (2017) concluded that the parsimonious solution type provides a data-based QCA result, unlike the so-called conservative and intermediary solution types that are commonly reported in literature but provide results that may not be warranted by the observed data.

The enhanced Quine-McCluskey Algorithm (eQMC) integrated in the QCApro R package was used to calculate the solutions. According to the package's developer, this algorithm is more advanced than the classical Quine-McCluskey Algorithm (QMC), as it does not use logical remainders (i.e. truth table rows without empirical

evidence (C. Q. Schneider & Wagemann, 2013)) to perform the minimization process (Thiem, 2017). It is also important to note that unlike other software tools, this package is capable of identifying model ambiguities – multiple models that fare equally well for the same set of configurational data in the same analysis (M. Baumgartner & Thiem, 2017a). In the analysis conducted for this study, model ambiguity was observed in several of the analyses. In these cases, those solution terms that were shared by all models were given more emphasis in their causal interpretation, while certain other solution terms were selected based on parameters of fit, most notably coverage values.

For the sample of persons with VI, a frequency threshold of two cases was used for the analyses, while for the sample of persons without VI, it was set to four. The frequency threshold means the lower bound of the number of cases belonging to a configuration, below which the configuration would be considered a logical remainder (Ragin, 2009). In other words, in the first sample, if a configuration was illustrated only by one case, it would be considered as unsupported by evidence. This threshold is used to limit the influence of measurement error on the findings. The choice of the values was based on the sample sizes, thus it was larger in the second sample. In the sample of persons with VI, this meant that 92% of the cases were considered in the analysis. For the sample of persons without VI, this figure was 91%. Both values were well above the minimum of 80% suggested by Greckhamer et al. (2013). The consistency cutoff values for the minimization process (also known as the inclusion cutoff values) that provide the divide between those configurations that consistently display the outcome and those that do not were based on observing gaps between consistency scores (these are reported for each QCA analysis in the Results section).

### **3.4 RESULTS**

The results for each of the four QCAs conducted for each of the two samples are presented in tables that contain the main solution terms with the respective parameters of fit. In the descriptions and tables below, variables typed with all capital letters denote the presence of a condition or an outcome, while those typed in all small letters – their absence. First, the results for the sample of persons with VI are described. Table 6 represents the findings of the QCA for the presence of product interest. For this analysis, a consistency cutoff value of 0.89 was used for the minimization process. The algorithm resulted in four possible models. Three

solution terms were shared by all of them. In set-theoretic terms these can be described as the following paths (or configurations) that all lead to an interest in inclusive holidays: persons who perceive the relative advantage of such holidays in terms of social interaction, persons who are attracted to travel and perceive the relative advantage in terms of more freedom, and sociable persons who perceive relative advantage in terms of more freedom. Out of these, the first and the third paths were observed to have a substantial contribution to the outcome, reflected by the high raw coverage values.

Table 6. Sufficient solution terms for product interest among persons with VI

Number of models	4				
	CTC	FRE* ATR	FRE*SOC	Model 4: (EXP*ATR)	Model 2: (FRE* EXP)
Raw coverage	0.727	0.127	0.608	0.623	0.608
Unique coverage	0.101	0.006	0.021	0.015	0.001
Number of covered cases	84	12	65	66	67
Consistency	0.884	0.934	0.947	0.933	0.936
Solution coverage	0.839- 0.871				
Solution consistency	0.878- 0.882				

Two other solution terms, each of which appeared in one of the models identified by the analysis, are interesting for consideration given their high raw coverage scores. Both of these share the perception of relative advantage in terms of experience. For one of them, it occurs in conjunction with the perception of freedom. In the other one, this perception only occurs to people who are attracted to travel. It is interesting to observe that the perceived relative advantage in terms of social interaction unambiguously appears as an antecedent to product interest, without the necessity of combination with any customer characteristic. The perception of freedom unambiguously appears as an antecedent in conjunction either with sociability or the attraction to travel. The role of perception of extraordinary experience as a relative advantage, however, is ambiguous in its contribution to the interest in inclusive holidays among persons with VI.

In line with the logic underlying QCA, the solution for the absence of product interest, which is presented in Table 7, does not simply contain the opposite of the solution terms for its presence. Here, the eQMC algorithm (a consistency cutoff value of 0.81 was used) identified two models fitting the data. One of the solution terms was shared by both models – sociable people who are not attracted to travel and do not perceive relative advantage in terms of social interaction. Two other solution terms appeared only in one of the models. Both of these related to persons attracted to travel not perceiving relative advantage of the inclusive holidays. It is important to note that the raw coverage values for the solution paths as well as for the whole solution were rather low, which hints that there may be other reasons for no interest in the holidays not covered by the selected conditions. Some other considerations for the low coverage values are discussed later in the Limitations section.

Table 7. Sufficient solution terms for the absence of product interest among persons with VI

Number of models	2		
	SOC*ctc*atr	Model 2: (fre*soc*ctc*ATR)	Model 1: (fre*soc*exp*inn*ATR)
Raw coverage	0.215	0.182	0.189
Unique coverage	0.148	0.013	0.021
Number of covered cases	6	2	2
Consistency	0.788	0.924	0.957
Solution coverage	0.330-0.338		
Solution consistency	0.822-0.838		

The QCA for expressed adoption likelihood of inclusive holidays, applied with a consistency cutoff value of 0.85, yielded 29 fitting models. Despite this high ambiguity, one solution term was shared by all of them with a high raw coverage score, which is illustrated in Table 8. This term comprised persons who are attracted to travel and perceive relative advantage of inclusive holidays in terms of the social interaction they offer. Other three solution terms of interest that appeared in certain models with high raw coverage scores are persons attracted to travel who perceive relative advantage in terms of the experience, persons attracted to

travel who perceive relative advantage in terms of freedom, and sociable persons who perceive relative advantage in terms of freedom.

Table 8. Sufficient solution terms for expressed adoption likelihood among persons with VI

Number of models	29			
	CTC*ATR	Model 6: (EXP*ATR)	Models 5, 19- 21, 23: (FRE*ATR)	Models 1-3, 9, 12-17, 19-22, 24- 26: (FRE*SOC)
Raw coverage	0.651	0.652	0.627	0.641
Unique coverage	0.016	0.005	0.000	0.002
Number of covered cases	68	66	65	65
Consistency	0.806	0.835	0.823	0.855
Solution coverage	0.828-0.863			
Solution consistency	0.781-0.801			

The analysis with the absence of adoption likelihood as an outcome, based on a consistency cutoff value of 0.86, generated 11 models fitting the data (Table 9). Only one solution path was shared by all models – innovative persons attracted to travel who did not perceive relative advantage in terms of experience. Other solution terms of interest that appeared in some of the models were persons attracted to travel who did not perceive relative advantage in terms of social interaction and experience, sociable persons who did not perceive relative advantage in terms of social interaction and freedom, and sociable persons who did not perceive relative advantage in terms of social interaction and experience. Similar to the findings for the absence of product interest, the coverage values for the solution paths and the solution as a whole were rather low.

Table 9. Sufficient solution terms for the absence of expressed adoption likelihood among persons with VI

Number of models	11			
	exp*INN* ATR	Model 10: (ctc*exp* ATR)	Models 2, 8: (fre*SOC* ctc)	Models 1-6, 9: (SOC*ctc* exp)
Raw coverage	0.360	0.434	0.481	0.457
Unique coverage	0.069	0.009	0.000	0.000
Number of covered cases	15	26	24	26
Consistency	0.761	0.713	0.766	0.759
Solution coverage	0.591-0.635			
Solution consistency	0.712-0.735			

The same four analyses were conducted for the sample of persons without VI. For product interest, a consistency cutoff value of 0.89 was chosen. Four models were identified with two solution paths shared by all of them (Table 10) – innovative persons who perceive relative advantage in terms of experience as well as sociable persons who perceive relative advantage in terms of experience and social interaction and do not perceive uncertainty related to participation. Two more solution terms appearing in some of the models warrant consideration given their high coverage values. They overlap by covering persons who are attracted to travel, perceive relative advantage in terms of experience and do not perceive uncertainty. One of the paths includes the perception of relative advantage in terms of social interaction, while the other one – the sociability of the person.

Table 10. Sufficient solution terms for product interest among persons without VI

Number of models	4			
	EXP*INN	EXP*CTC* unc*SOC	Models 1, 3: (EXP*CTC* unc*ATR)	Models 1, 2: (EXP*unc* SOC*ATR)
Raw coverage	0.499	0.450	0.442	0.522
Unique coverage	0.032	0.015	0.004	0.000
Number of covered cases	135	149	143	170
Consistency	0.879	0.863	0.874	0.874
Solution coverage	0.648- 0.654			
Solution consistency	0.843- 0.852			

In the analysis for the absence of product interest among persons without VI, a consistency cutoff value of 0.8 was used. Here, the algorithm generated only one unambiguous model with six sufficient solution paths (Table 11). Two of these comprised single conditions – persons who do not perceive the relative advantage in terms of experience and persons who do perceive uncertainty related to the holidays. The first one is characterized by a strikingly high coverage value. Another solution term with a relatively high raw coverage score is non-innovative persons who do not perceive relative advantage in terms of social interaction.

Table 11. Sufficient solution terms for the absence of product interest among persons without VI

Number of models	1					
	exp	UNC	ctc*atr	ctc*inn	soc*INN	SOC* inn*atr
Raw coverage	0.759	0.319	0.189	0.425	0.253	0.178
Unique coverage	0.178	0.020	0.007	0.017	0.016	0.019
Number of covered cases	214	54	27	86	26	26
Consistency	0.637	0.686	0.750	0.740	0.769	0.780
Solution coverage	0.876					
Solution consistency	0.586					

Similarly, only one model was identified through the QCA with the expressed adoption likelihood as the outcome. The results of the minimization process with a consistency cutoff value of 0.82 are presented in Table 12. The coverage value for the solution as well as for the six identified sufficient paths were relatively low. Persons who perceive relative advantage in terms of experience but not in terms of social interaction comprised the path with the highest raw coverage. One of the other solution terms was a rather curious finding as it included a conjunction between persons who perceive relative advantage in terms of experience and perceive uncertainty, despite the theory commonly suggesting that uncertainty hinders the adoption of products. Table 13 presents the findings of the analysis for the absence of expressed adoption likelihood. The one model, generated with a consistency cutoff value of 0.82, consists of two sufficient solution paths. One of them – persons who do not perceive relative advantage in terms of experience – is characterized by a very high coverage score. The other one comprised non-social people who do not perceive relative advantage in terms of social interaction.

Table 12. Sufficient solution terms for expressed adoption likelihood among persons without VI

Number of models	1				
	EXP*ctc	EXP*UNC	EXP*SOC *atr	EXP*soc *INN	ctc*unc* soc*INN
Raw coverage	0.373	0.167	0.197	0.175	0.148
Unique coverage	0.161	0.026	0.064	0.033	0.043
Number of covered cases	58	11	37	11	5
Consistency	0.775	0.792	0.828	0.831	0.815
Solution coverage	0.586				
Solution consistency	0.739				



Table 13. Sufficient solution terms for the absence of expressed adoption likelihood among persons without VI

Number of models	1	
	exp	ctc*soc
Raw coverage	0.678	0.206
Unique coverage	0.490	0.018
Number of covered cases	112	37
Consistency	0.832	0.931
Solution coverage	0.696	
Solution consistency	0.828	

### 3.5 DISCUSSION

The results of the QCA analyses – eight in total – provide a good opportunity to contrast them in different ways, provide recommendations for practitioners in the field, identify implications for theory on product- and innovation adoption, and delineate the limitations that come with the applied approach. Given the underlying assumption of asymmetric causation in QCA, it is not surprising that the solutions for the absence and presence of outcomes were not the opposites of each other. As the results have shown, this does not however mean that they are unrelated. For example, in the case of persons with VI, the perception of relative advantage appears as a sufficient condition for product interest, yet the non-perception of this aspect of relative advantage appears in conjunction with other conditions as a sufficient path for non-interest. The conditions of sociability and product category involvement (measured as attraction to travel), nevertheless, do not exhibit such clear mirroring effect between the absence and the presence of the outcome – in certain configurations their presence contributes towards non-interest, while in others it is their absence that is part of the solution term.

Two conclusions can be drawn from this comparison. The first one underlines the complexity of causal conditions: simple conditions (single characteristics) should not be considered in isolation, as their combination with different conditions may result in opposite outcomes. The second conclusion is based on the observation that while consumer characteristics may contribute to an outcome or its absence through either their presence or absence, the perceived product characteristics – relative advantage and uncertainty – exhibit a stable pattern in their contribution towards non-interest and non-likelihood of adoption. Specifically, it is always the

absence of relative advantage and the presence of uncertainty that appears in solution terms sufficient for the absence of product interest or expressed adoption likelihood. This observation mirrors the conclusion of Ordanini et al. (2014) that relative advantage can be viewed as a hygiene factor, whose absence has a stronger impact on non-adoption than the influence of its presence on adoption. It once again underlines the necessity for clearly communicating the value of the product to the customers in order to stimulate its adoption.

Previous literature has emphasized the conceptual differences between the various constructs often used interchangeably to measure product- or innovation adoption (Ajzen, 2008; Wright & MacRae, 2007). In the current study, two such constructs were measured – product interest and expressed adoption likelihood. In the questionnaire, the scales used for measuring them were intentionally different in order to avoid respondents aiming at a consistent response based on the preceding choice. Despite of this, the solutions generated by QCA were rather similar for both interest and likelihood, most notably in the sample of persons with VI. Clear subset relationships were also observed between the two outcomes. In the sample of persons with VI, perceived relative advantage in terms of social interaction was a sufficient condition for product interest, but for expressed adoption likelihood, it was sufficient only in conjunction with being attracted to travel. In the sample of persons without VI, innovative persons who perceive relative advantage in terms of experience was a sufficient path for product interest, yet for expressed adoption likelihood, this condition was only sufficient in conjunction with not being sociable. These subset relationship illustrate the funnel-like structure of the adoption process, where interest is an antecedent to adoption likelihood (De Pelsmacker & Janssens, 2007), and the movement to the next stage occurs only for some of the interested customers.

For persons with VI, it was the attraction to travel that differentiated those who expressed adoption likelihood from those that expressed interest in the holidays. This observation may be interpreted in two ways. On the one hand, it hints at the importance of congruence between the product and the customer's general interests (i.e. a travel product for persons who like to travel). On the other hand, especially when considering the peculiarities of travel for people with VI, it can also mean that persons who have more travel experience and are more comfortable with traveling, may expect that they are more likely to participate in an inclusive holiday. This would highlight the necessity of convincing the less experienced

customers with VI about the safety and comfort associated with the product. Nevertheless, the QCA also identified a sufficient solution path that did not include attraction to travel: for sociable persons, inclusive holidays may play a role of an alternative to other leisure activities, not just travel, as long as it offers the freedom that other activities do not.

In the sample of persons without VI, there are no such clear differences between the solutions for interest and adoption likelihood. However, it is worth noting the peculiar role that the perceived relative advantage in terms of social interaction plays in explaining the two outcomes. While the perception of this advantage appears in several solution terms for product interest, its absence appears in solution terms for adoption likelihood. This may mean that the social aspect of the holidays may not be strong enough to convince a person without VI to participate in an inclusive holiday, especially when comparing with the relative advantage in terms of experience, which appears in four of the five solution paths for expressed adoption likelihood. Another unusual sufficient configuration is that of perceived uncertainty with the perception of experience as a relative advantage. This combination points to the small number of persons for whom uncertainty is more of a benefit than a cost. It also emphasizes the problematic conceptual ambiguity of the term 'uncertainty' in product adoption literature (Zins, 2002) and proves that the general causal statement "uncertainty has a negative effect on innovation adoption" (Arts et al., 2011) should be further scrutinized. It is, however, important to consider that this result may have occurred due to a different understanding of the words 'uncertainty' or 'risk' by different survey respondents.

Another difference that is observable between the QCA results for interest and for adoption likelihood is the decrease in the amount of outcome explained by the configurations composing the logical solution illustrated by the solution coverage values. Given the findings of earlier literature (Arts et al., 2011), it is plausible to expect that the antecedents for the attitude of product interest will be significantly different from those of purchase behavior or at least expressed likelihood of this behavior (Wright & MacRae, 2007). It is also plausible to assume that objective factors that were not accounted for in the survey, such as the amount of disposable time and income, family and work obligations, as well as situational factors, may have a very strong influence on a purchase decision. In the sample of persons with VI, the decrease in the solution coverage values was not so significant, yet the

model ambiguity (29 alternative models identified for expressed adoption likelihood) also indicates that the chosen conditions do not fully explain adoption behavior.

Finally, it is worth taking a note of the differences between the two samples. The division of the samples and their subsequent separate analyses were done based on the *a priori* assumption that the perspectives of the two groups are different. The organizations marketing the holidays also communicate differently to the two groups, which also includes different offerings. The QCA results showed certain overlaps between the two groups in terms of sufficient configurations for interest and non-interest. For example, both groups shared the configuration of persons attracted to travel and perceiving relative advantage in terms of experience leading to product interest and the configuration of persons not attracted to travel and not perceiving relative advantage in terms of social interaction leading to the absence of product interest. As for expressed adoption likelihood, the perceived relative advantage in terms of experience was very prominent for persons without VI, while social interaction – for persons with VI. Furthermore, innovativeness as a customer trait appeared in several configurations for persons without VI but only in one of the paths towards the absence of adoption likelihood among persons with VI. This finding may hint that the concept of inclusive holidays is more of an innovation for customers without VI.

### **3.6 VALIDITY AND LIMITATIONS**

Choosing QCA for studying the antecedents of adopting inclusive holidays for groups consisting of persons with and without VI was based on the merits of this approach discussed by many scholars, including those using it for studying innovation adoption. Readers, especially those not very familiar with QCA methodology, may have a natural interest to compare the findings obtained through this approach with those of more traditional, statistical methods. Ordanini et al., (2014) employed cluster analysis, deviation score analysis and regression analysis with interaction terms to confirm their QCA findings and concluded that QCA provided a better explanatory power compared to the other methods. Wagemann (2017) noted that comparing QCA findings with results obtained through statistical techniques might not be possible given the fundamental differences in the logic and assumptions underlying these approaches. As no benchmark exists that would contain ‘true’ results without biases related to methodological assumptions, a possible difference between the findings of QCA and statistical results could not

be interpreted unambiguously. For this reason, no statistical methods were used to confirm the findings of the study. As a result, the findings should be considered with the understanding of the logic and assumptions of configurational comparative analysis.

Naturally, there are validity considerations within QCA. Since the procedures are based on many decisions taken by the researcher, it is important to check for the robustness of the results based on different input values. For the analyses conducted in the current study, several frequency and consistency cutoff values were tested, and the outcomes were strongly overlapping, thus indicating generally robust results. The observed changes, such as more specific solution terms for smaller frequency cutoff values (solution terms at smaller frequency cutoff points were subsets of those obtained with larger frequency cutoff values), were in line with the methodological effects of these changes. The change in consistency cutoff values did not result in significant changes. Minor changes in calibration also did not affect the results significantly. Testing for significantly different calibrated sets was not justified, given the theoretical background of the calibration itself.

In order to conduct the study, the author also had to take a stand in the debate that currently exists within the QCA community on which algorithms should be used for the analysis and which solution types should be calculated. The majority of QCA studies have been following the procedures of the so-called Standard Analysis (SA) or the Enhanced Standard Analysis (ESA) proposed by C. Q. Schneider and Wagemann (2013), which involves an independent identification of necessary conditions and favors the so-called conservative or intermediate solutions obtained through the QMC algorithm. M. Baumgartner and Thiem (2017b) claimed that studies that followed this procedure had produced invalid results. Instead, based on simulations, the authors suggested pursuing the parsimonious solution type, which provides more valid results in situations of limited empirical diversity, as well as applying the eQMC algorithm, which is better at identifying model ambiguity (M. Baumgartner & Thiem, 2017a) that the standard approaches simply overlook. Despite the prevalence of the ESA approach in published QCA papers, the recommendations of Thiem (2017) were followed in the current study.

As with many other studies, the main sources of validity issues of the current one are related to data collection. All the limitations of measurement through structured online survey are applicable here. Furthermore, as it was mentioned earlier in the

section about calibration, the concepts describing product- and customers characteristics as well as innovation adoption have not been developed in set-theoretic terms and the validated scales used for their measurement lack suggestions for a qualitative interpretation of their values. As a result, the calibration conducted on such measurements, especially when using averages of several items, may have an influence on the findings. For example, product interest was measured with a unipolar scale, where only one of the values from the five was calibrated as fully in the set of non-interest. The low number of respondents selecting this option may have been caused by the scale, which consequently could result in the low coverage values of the QCA with this outcome.

It is also important to note that the perceived attitudes towards the product were measured as responses to an 11-sentence long description of the concept. While this description was based on existing marketing communications of real-world organizations offering such holidays, it did not include imagery that often accompanies such texts, or any brand information, that both may influence the perceptions of the customers in a real-world situation. In strict terms, the findings of the analyses should be related to the description used in the process of data collection, but this description was deemed as a sufficient proxy for the context of a scientific study rather than a market research exercise.

Finally, it is necessary to recognize that the findings of the analysis have a limited generalizability given that the samples used for data analysis were not representative. Representativeness is not a crucial issue in QCA studies, and researchers conducting small-N QCA favor choosing the cases based on some known properties in order to achieve a diversity among the cases (Greckhamer et al., 2013). In the current study, representativeness would allow to make generalizable conclusions. However, given the breadth of the population, it was close to impossible to achieve a representative sample, and instead an attempt was made to collect as diverse responses as possible through a broad sampling frame. Self-selection bias, nevertheless, cannot be excluded.

## **3.7 IMPLICATIONS**

### **3.7.1 Theoretical implications**

It was not the purpose of this study to review or test the theories of product- or innovation adoption. In fact, the design of the study was heavily influenced by the

decades of research on this topic. At the same time, the paper joins in a small but growing number of publications that follow a configurational logic for studying this phenomenon. Some of the findings support conclusions from previous papers, for example, that relative advantage can be considered as a hygiene factor that does not necessarily contribute to product adoption, but its absence may lead to non-adoption (Ordanini et al., 2014). In this study, relative advantage was measured through three aspects, and the findings indicate that 'different relative advantages' configure differently with other factors. However, no generalizable pattern was found for recurring combinations of specific consumer characteristics with perceived aspects of relative advantage.

Among the selected consumer characteristics, product category involvement – which was measured as attraction to travel in general – was the most notable one in the identified solution paths, which has been noted in previous studies as well (Arts et al., 2011). Innovativeness, on the contrary, did not show much influence on the outcomes, which may indicate that the studied service was not considered an innovation by the participants. Sociability is not commonly used as an antecedent in product adoption studies, but in the specific case of inclusive holidays, it proved to exhibit an important role in various configurations. In order to consider other commonly used characteristics, such as novelty, complexity, trialability, etc, with QCA, larger samples are needed to provide better empirical evidence.

### 3.7.2 Managerial implications

The analyses identified certain differences between the characteristics combinations that lead to an interest in participating in inclusive holidays and those that lead to an expressed likelihood of adopting them. Marketers of such holidays can exploit these differences in the following way. The descriptions of customers based on the characteristics leading to product interest should be considered as the frame containing a susceptible audience for communications. These communications can be further adjusted by taking into consideration those combinations that indicate low likelihood of holiday booking as well as those that differ between interest and booking likelihood.

In the case of persons with VI, the frame consists of two major groups – sociable persons and persons that are attracted to travel (or in other words, travel actively). For the first group, it is necessary to emphasize the value provided by the holidays

in terms of the freedom and the social interaction it provides, while at the same time convincing them that the holidays provide a safe and comfortable experience. For the second group, the focus in communications should be on the extra experiential value provided by the market offering.

As for persons without VI, the frame can be roughly divided into three groups – innovative persons, sociable persons, and persons attracted to travel. For all three groups, the most important aspect is the experiential value provided by the holidays. It needs to be communicated in clear and tangible terms. For some of the customers, even a certain level of uncertainty (i.e. risk or elements of the ‘unknown’) may not be a hindrance. The results of the analyses have shown that the relative advantage in terms of social contact are not an important consideration for persons without VI. On the one hand, this implies that focusing on this aspect of the holidays is not necessary when conducting marketing for this target audience. On the other hand, it may be a problem if the product attracts persons with VI who seek social interaction and persons without VI who do not, as the success of the holidays depends on their interaction. Therefore, another suggestion would be re-designing the holidays in a way that the social interaction plays a center role for both groups of participants and provide clear communications about it to the target segments. This may change the perception of the holidays for all customers, but it would also avoid conflicting expectations between holiday participants during their travels.

### **3.8 CONCLUSIONS**

This study identified configurations of antecedents that lead to the interest (and non-interest) and intention (and non-intention) in participating in inclusive holidays that take place in groups consisting of persons with and without VI. From a managerial perspective, it contributed by providing information that can be used to describe the various groups of persons within the German-speaking population that may become customers for such holidays. In terms of theory, the study contributes to the small amount of research that considers product- and innovation adoption from a configurational perspective. Furthermore, its findings are based on exploring interactions between adopter (or customer) characteristics and innovation (or product) characteristics, something that has been seldom done in previously published literature (Arts et al., 2011).

The QCA used for evaluating the data collected through a structured online questionnaire found that there are multiple sufficient paths that lead to an interest



in the holidays or to an expressed likelihood of participating in them. The non-perception of relative advantage plays a particularly important role in determining the absence of product interest or adoption likelihood, while the presence of perceived relative advantage does not have such a clear role for any of the outcomes. Among persons with VI, aspects of relative advantage related to social interaction and freedom have the most influence, while for persons without VI, the perception of extraordinary experiences gained through the holidays is more important. In one solution term, perceived uncertainty in conjunction with perceived relative advantage in terms of experience was shown to lead to adoption likelihood among persons without VI. Among customer characteristics, product category involvement (attraction to travel) and sociability were the most prominent antecedents, while innovativeness was noticeable only among persons without VI. In all QCA solutions, customer characteristics appeared in conjunction with other conditions – either other customer characteristics or perceived product characteristics.

The analyses also indicated that solution terms for product interest often comprise a superset of those for expressed adoption likelihood. The marketers of such holidays thus may want to pay attention to those conditions that differentiate the solution terms for interest and adoption likelihood as well as those that lead to the absence of adoption likelihood (the possible barriers that exist between interest and adoption), when designing their marketing communications and other activities targeting the customers. Nevertheless, it is important to consider that changing the product or its marketing communications substantially may in its turn affect the whole perception of the customers, including the antecedents that lead to adoption intention.



# Postface

The three papers that have been presented within this dissertation as well as its preamble explored a specific form of tourism – organized holidays in groups consisting of persons with and without VI. The small scale of these holidays as well as their relative recency resulted in a dearth of scientific attention to this topic. With this dissertation, this gap has been substantially filled by three studies that looked at this form of tourism from three different perspectives. The findings of the studies brought multiple insights that can equip marketers of organizations that offer such holidays. Due to the small size, such organizations are not in a position to conduct large-scale market research, and the studies of this dissertation may thus be considered as a substitute. Nevertheless, the choice of inclusive holidays as the object of inquiry (and theme) for this dissertation was not driven by the lack of research or the needs of practitioners. Inclusive holidays provide an extraordinary case of a tourism service that allows for studying or even reconsidering established concepts in the field of tourism studies. Tourist motivation, tourist experiences, and innovation adoption were the three concepts that were scrutinized by using inclusive holidays as the context.

What makes inclusive holidays extraordinary? First, it is a tourism service that involves two different groups of customers, with *a priori* different backgrounds and abilities, whose collaboration and collective agency is essential for the success of the holidays, and consequently, for the satisfaction of the participants. Second, the experiences of the travelers are different from those traditionally covered in tourism scholarship. For participants with VI, visual stimuli do not play such an important role as the paradigm of the tourist gaze suggests, while the participants without VI have their perceptions affected by the process of sighted guiding. In addition, both participants with and without VI have their individual agency limited by each other. Third, while inclusive holidays constitute a form of package group holidays, which existed for decades, they are not familiar to the majority of potential tourists and thus can be considered as an innovation.

In the study described in *Paper 1*, the formation of motivations for participating in inclusive holidays was considered as a complex process with factors existing at the psychological and social levels (and implicitly assuming other factors at other levels). Most importantly, motivations were seen not as independent discrete entities but as combinations of various factors, including those occurring in the individual's external environment. Considering motivations as such combinations or even 'coincidences' may be more effective for marketers. Focusing exclusively on internal motives or on the exploitation of 'pull' factors is insufficient without considering the situational factors that 'activate' these motivations. For inclusive holidays, the most common such situation is the absence of a travel companion. The comparison between participants and non-participants identified the crucial role of trust and fears that affect the motivation formation. Some of these are well-established and sociogenic, and thus are difficult to change, but others, such as the uncertainties related to the holiday organization or the other customers, can be and should be addressed by the service providers.

The empirical study in *Paper 3* built upon the findings of the first paper, yet it took a different conceptual (innovation adoption) and methodological (QCA) approach to identify the configurations of consumer characteristics and perceived product characteristics that result in product interest and high adoption likelihood among persons who have not participated in inclusive holidays before. The analyses have shown that interest and adoption likelihood can occur through different paths, and that there are certain differences between persons with and without VI. Building up a differentiation and positioning strategy that would harmonize the perceptions of both groups may be a challenge for the tour organizers, as the findings suggest that potential customers without VI perceive inclusive holidays as an extraordinary experience, while persons with VI – as a social experience. As mentioned earlier, the success of the holidays depends on both, thus differing expectations may be problematic.

*Paper 2* delved into the actual experiences occurring during an inclusive holiday. Using affordances as the units of analysis offered a fresh perspective on service experiences and service design, not only for inclusive holidays but for other service fields as well. Thinking of services as arrays of relationships (i.e. affordances) that exist between human capabilities (with human interests as an additional layer) and the servicescape (or service environments) makes it less likely for service providers to design services that are not compatible with their customers, and thus

the chance of customer dissatisfaction diminishes as well. What stays crucial is identifying those relationships. Participant observation with the help of a wearable camera and subsequent customer interviews proved to be useful for gaining insights, even related to issues that customers were not able to express unprompted or did not notice consciously. The observation also uncovered activities improvised by the customers that were not foreseen by the service provider, but their incorporation into the design of the holidays could be beneficial.

Critical realism served as the philosophical lens for the dissertation. The choice of this paradigm was driven by its compatibility with the realities of marketing and business practice. Its realist ontology and relativist epistemology as well as the assumption of fragility of knowledge account for the complexity of the social world but also allow for a firm and common ground for causality. Apart from the major principles of critical realism, such as the three levels of reality, the studies of the dissertation share other commonalities. The stratified view of reality is echoed in the three levels of affordances and the funnel-like structure of product adoption phases. The configurational logic of causality was assumed not only in the QCA analyses but also in the joint consideration of tourist motivations and situational factors as well as in the concept of affordances, which considers behaviors as contingent on the physical capabilities of an individual and the features of the environment.

Recently, critical realism and configurational causation have been embraced by many social scientists, especially those working in the fields of management science, marketing, and tourism. They allow bridging some of the gaps left by more traditional positivist or postmodern interpretivist inquiries. At the same time, much of the research conducted within a critical realist worldview derives scales and theories developed in earlier studies, performed within other paradigms. In this dissertation's *Paper 3*, it has become obvious that all the concepts of adoption behavior have been historically operationalized as continuous variables, whereas QCA necessitates variables that are dichotomous in principle. Recent findings in neuroscience suggest that information in the human brain is represented in a discrete rather than a continuous form (Tee & Taylor, 2018), which makes it plausible that re-conceptualizing many of the social science phenomena and finding new forms of their measurement may benefit the development of theories. Until then, the findings of studies, such the ones contained in this dissertation,

should be taken cautiously, with an understanding that some of the operand concepts have been developed in paradigms other than critical realism.

This dissertation established that inclusive holidays for persons with and without visual impairment are a form of tourism that can be beneficial for the society and can improve the equity of tourist experiences. It identified the important role of the personality, social influences, the marketing activities of travel organizers, the elements of the servicescape and configurations of factors in affecting the behavior of persons in choosing and participating in inclusive holidays. It also suggested ways how the holidays can be changed to advance this equity. Although inclusive holidays remain a niche at this time, strategic changes informed by the findings of this research may help their growth, which as the last study has shown, has a potential.



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# Appendices

## **APPENDIX 1. INTERVIEW GUIDE FOR PAPER 1**

### *Questions for former inclusive tour participants*

This interview is part of a research project that aims to understand the motivations of people participating in inclusive holiday experiences and the value of such experiences. It is conducted at MODUL University Vienna independently from the companies that provided you with the holiday service. I want to talk to you about your experience as a tourist travelling in a group with people with and without visual impairment. It is the first stage of the research where we want to obtain first-hand insights from participants and therefore your contribution is highly appreciated.

Your participation is voluntary. If you agree, I would like to record this interview, but only so that we can use the information at the aggregate level to develop research patterns and findings. Your personal identity (including your name and your individual responses) will be kept strictly confidential. You are free to stop the interview at any time or refuse to answer questions that you do not feel comfortable with. The interview will last between 20 and 40 minutes.

Are you willing to participate in this interview? Do you agree to record this interview?

I would like to ask you about your general travel behavior and travel preferences. How often do you travel for leisure (trips lasting more than one day)?

What type of travel do you usually engage in – is it individually organized travel, visiting friends and relatives, package holidays?

From now on, by inclusive holiday experience I will refer to a holiday with a group consisting of people with visual impairment and without.

Can you recall, how many times did you participate in an inclusive holiday with a group consisting of people with visual impairment and without?

At the time of participating in the (first) inclusive holiday experience, would you describe yourself as having a severe form of visual impairment, such as low vision, near-total or total visual impairment?

At the time of participating in an inclusive holiday experience, did any of your close social contacts (such as family members, friends, colleagues) have a severe form of visual impairment?

Can you tell me, when and how did you find out about the offer of inclusive holiday experiences? (about the tour package) [Possible prompts – did someone tell you about it/ did you hear it in the media/ did you read about it online? did you find out about the offer by chance or did you look for an inclusive holiday specifically?]

At what age did you participate for the first time in an inclusive holiday experience (where people with and without visual impairment took part)?

How would you describe your employment status at the time when you participated for the first time in an inclusive holiday experience (where people with and without visual impairment took part)?

How would you describe the highest completed level of education at the time when you participated for the first time in an inclusive holiday experience (where people with and without visual impairment took part)?

Now, please, recall the time when you decided to participate in an inclusive holiday for the first time. How would you describe your main reasons for participating? (What motivated you to participate in an inclusive holiday?)

Did you consider other leisure options, for example, mainstream package tours, individually organized travel, specialized travel? And if yes, why did you opt for an inclusive holiday experience compared to other forms of leisure and travel?

Can you tell me what were your expectations prior to the holiday? [Possible prompts – how did you feel before the holiday? did you expect to relax, visit places, bond socially? did you feel any anxiety before the holiday?]

Do you think your expectations were met during the holiday?

What did you hope to gain from the holiday when you booked it for the first time?

Do you think you have received this benefit/this value?

What was the most memorable experience of your holiday(s)? [Possible prompt – do any memories related to visiting a place / participating in an activity or event / conversing with tour guide or travel mates stand out?]

What was the most difficult part or experience of your holiday(s)? [Possible prompt – were there any reasons for dissatisfaction? did you face any difficulties with participating in the activities / conversing and engaging with tour guide or travel mates / enjoying the time?]

How would you describe the satisfaction of other tour participants? Do you think they were satisfied by the holiday? [Possible prompt – have you noticed any other participants who might have been dissatisfied? why?]

Can you think of any differences between participation in inclusive holiday(s) compared to other holiday or leisure experiences that you've had in the past?

Did the participation in this holiday make any difference in your life? If yes, how? [Possible prompt – do you feel like you have learnt something new / acquired new skills / made friendships?]

After the first inclusive holiday experience, what was the main reason that prompted you to participate in another inclusive holiday experience?

Would you like to participate in another inclusive holiday experience? Why or why not?

***Some additional questions for non-participants***

This interview is part of a research project that aims to understand the motivations of people participating in inclusive holiday experiences and the value of such experiences. It is conducted at MODUL University Vienna independently from companies that provide holiday service. I want to talk to you about your travel experiences as well attitudes towards travel in general and in particular arrangements specifically.

Your participation is voluntary. If you agree, I would like to record this interview, but only so that we can use the information at the aggregate level to develop research patterns and findings. Your personal identity (including your name and

your individual responses) will be kept strictly confidential. You are free to stop the interview at any time or refuse to answer questions that you do not feel comfortable with. The interview will last between 20 and 40 minutes.

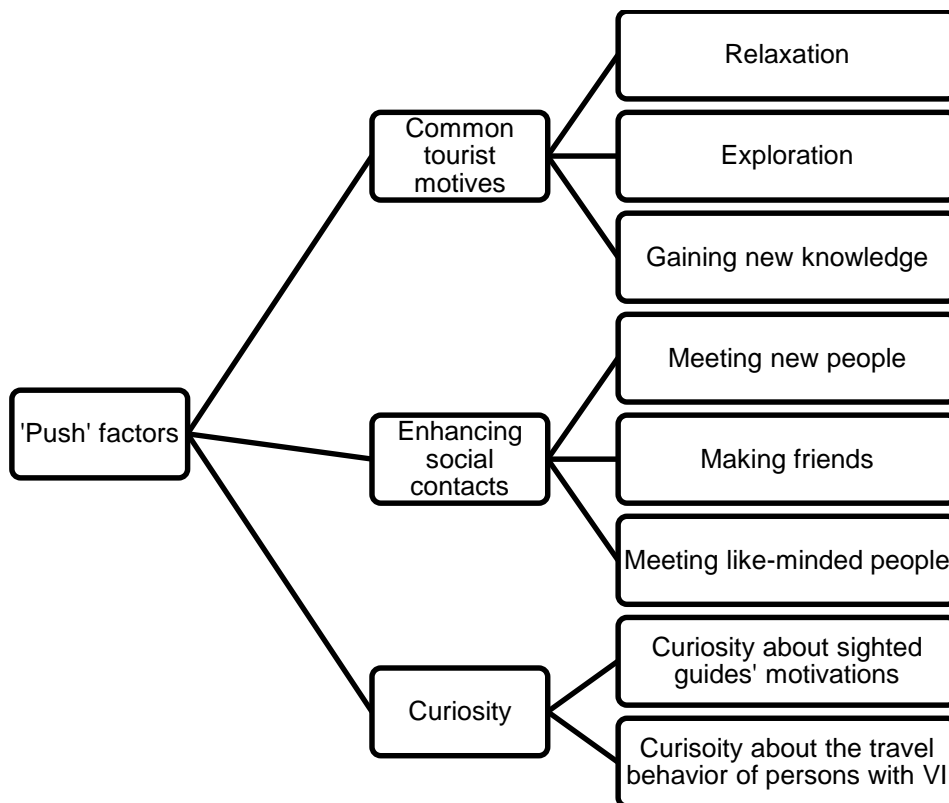
How would you describe the main reasons for traveling in general?

Have you ever participated in an organized travel experience which was designed for persons with visual impairment?

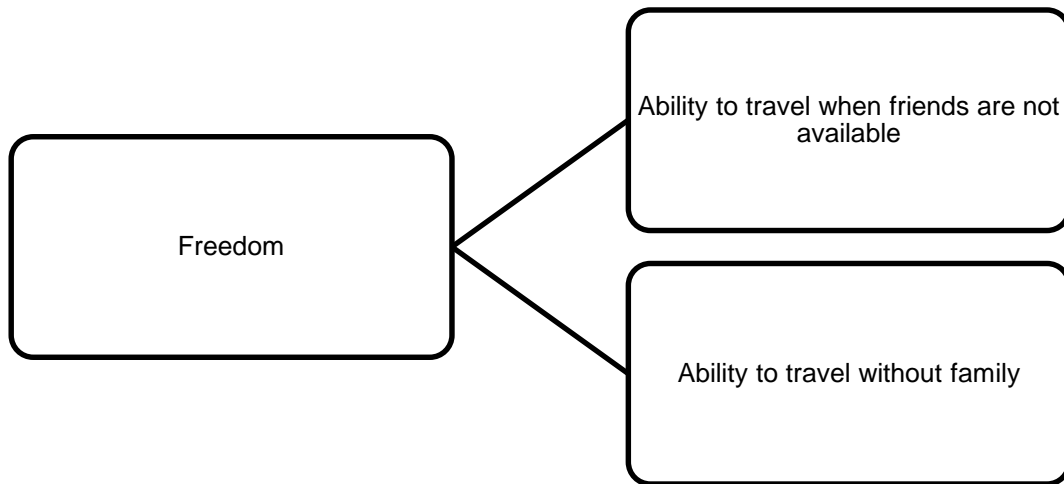
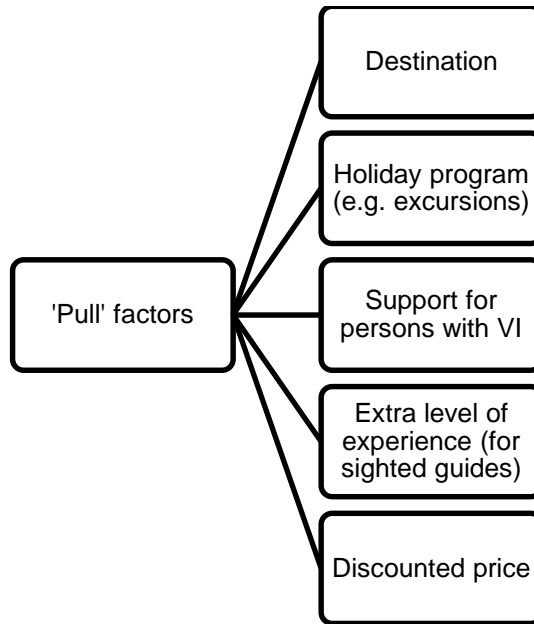
Could you elaborate on why have you chosen this specific type of travel arrangement compared to organizing the travel individually or opting for other organized travel products?

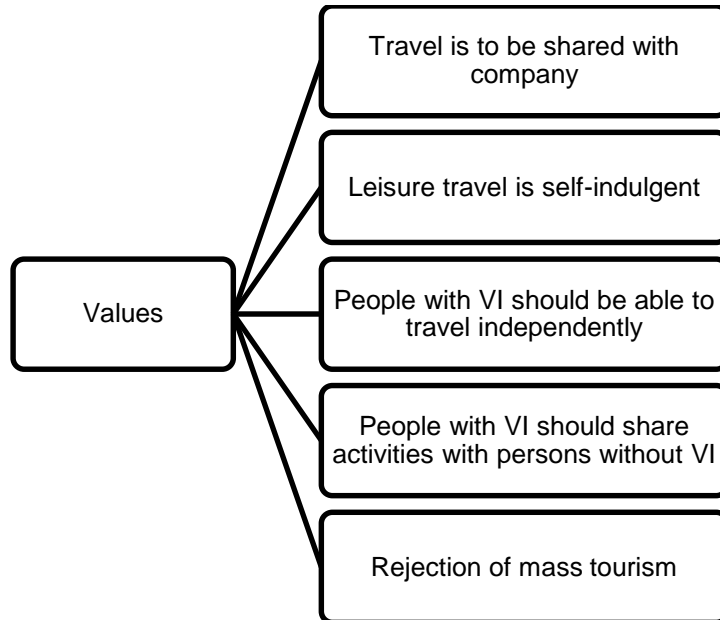
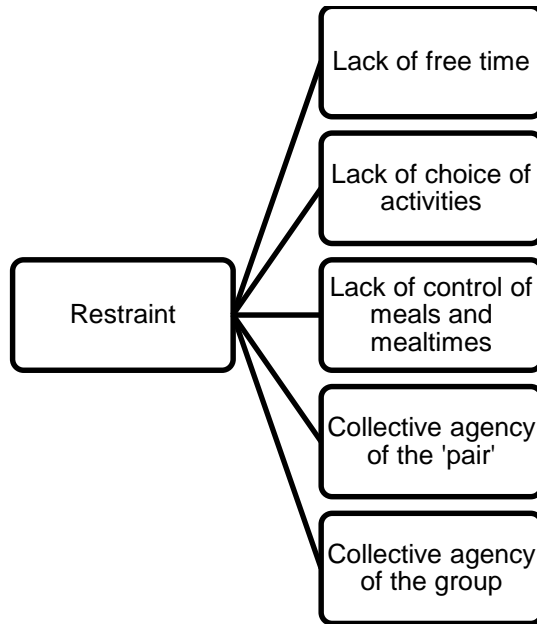
What do you think about holidays where both people with and visual impairment travel together and the sighted participants guide the persons with visual impairment during the day? Have you ever considered participating? Why? Why not?

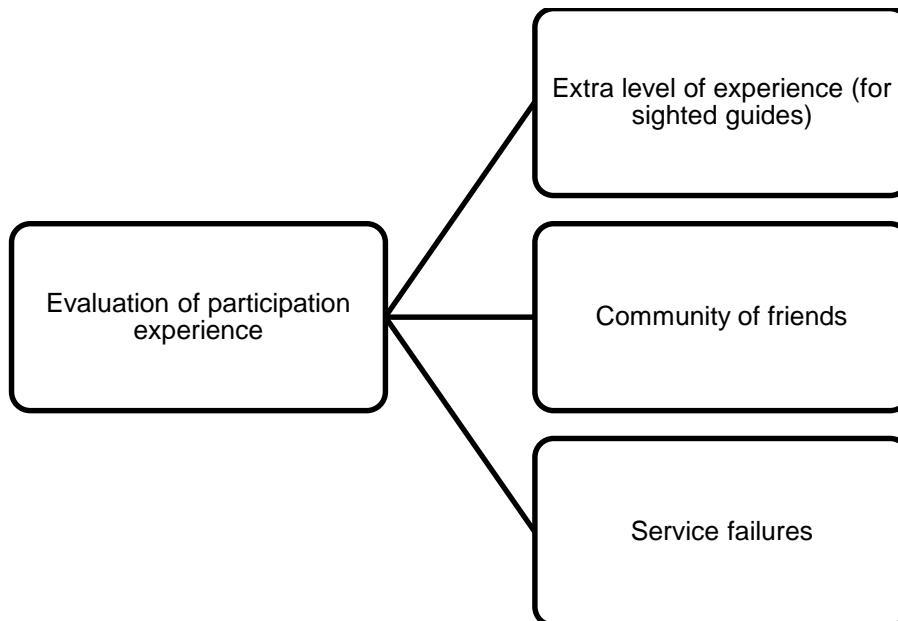
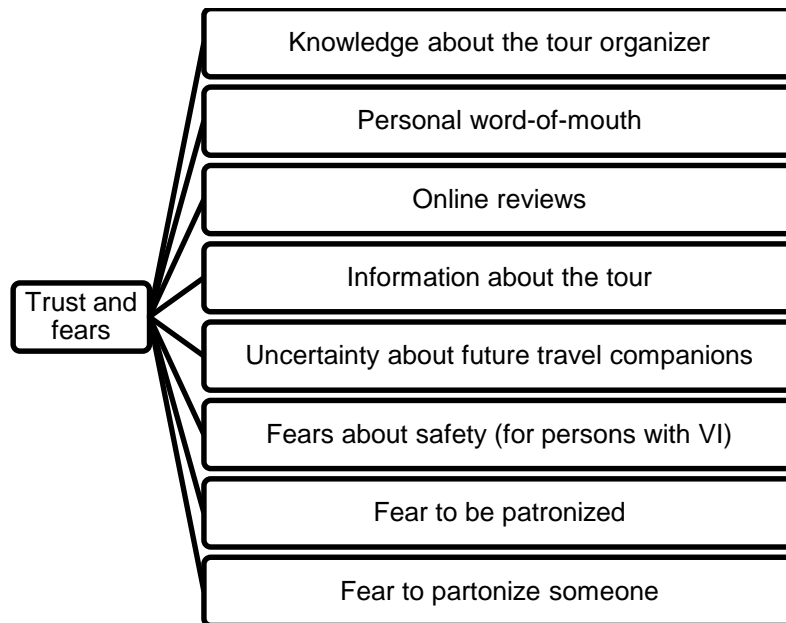
## **APPENDIX 2. THEMES AND SUBTHEMES OF THE THEMATIC ANALYSIS IN PAPER 1**











### **APPENDIX 3. INTERVIEW GUIDE FOR PAPER 2**

#### *Discussion topics for participants without VI*

Did you feel any difference between your guided tour experiences with an inclusive group and past experiences with mainstream groups? Specifically, in terms of the service you were provided. For example, was there any difference between the tour guides and their services?

Do you see any additional benefit in touching artefacts as compared to verbal description (and gazing)?

What are in your understanding the responsibilities of the sighted guide?

What are the benefits of the process of sighted guiding?

Have you experienced any difficulties when doing sighted guiding?

What kind of improvements would you like to see in holidays for inclusive groups?

*Discussion topics for participants with VI*

During outdoor activities, particularly sightseeing, what are your expectations from sighted guides and from the tour guide, or other service providers in terms of street safety?

During a guided tour, with a tour guide, how important for you is the intonation of the spoken language of the tour guide? For example, is it easy for you to understand whether the guide asks a question or whether it is rhetorical one, whether he/she used irony, humor, etc?

What about the hand gestures of a tour guide, particularly those related to giving directions? Is it important for you to receive verbal descriptions along these gestures?

During biscuits tasting in Prato, the tasting facilitator could either offer you a basket with biscuits to choose from or he could offer you a biscuit by placing it into your hand with tongues. In the first case, he could provide you with more freedom to choose a biscuit. In the second case, he would make the process more efficient. In Prato, the man chose the second option – with the tongues. How do you feel when a sighted service provider offers extra assistance by default when this extra assistance may take away the choice of your own actions?

Have you ever felt excluded when the tour guide would address a matter or ask a question that you could not consider given your visual abilities? (For example, asking to guess the age of a building presumably based on its looks)?

In terms of landscapes and architectural elements, do you prefer a tactile or verbal description of the physical objects?

What type of verbal description do you prefer – ones that are more figurative (such as metaphors, everyday comparisons) or descriptions that are more technical?

(Example: Comparing the size of a bell with an animal or expressing its size in meters)

How important for you is the accurate representation of the reality by tactile materials? (Example: Touchmap of Florence with a broken model of the tower)

What do you expect from a sighted guide in terms of them helping you towards touching or feeling objects in a non-visual way?

How do you perceive the sighted guide's control over the routes to take, the activities to do, guiding the movements along a touch map, as well as the personal interpretations of physical artefacts, objects, surroundings?

In your opinion, what is the role of sighted guides in your social experience in the group?

What are your expectations for meal experiences? In terms of the arrangements, and the role of the sighted guide? Are there any specific meals that you would prefer to avoid given the difficulties in eating them?

#### **APPENDIX 4. ELEMENTS OF THE QUESTIONNAIRE USED FOR DATA COLLECTION (IN ENGLISH)**

<b>Questionnaire item</b>	<b>Response scale/options</b>	<b>Notes</b>
Please indicate the degree of your visual impairment	<ul style="list-style-type: none"> <li>• Severe visual impairment</li> <li>• Blind</li> <li>• Color blind</li> <li>• Other degree or other form</li> <li>• No visual impairment</li> </ul>	<i>Only for the sample of persons with VI</i>
Which of the following conditions apply to you?	<ul style="list-style-type: none"> <li>• No disability other than visual impairment</li> <li>• Mobility disability</li> <li>• Other sensorial disability (e.g. hearing loss)</li> <li>• Mental disability</li> <li>• Cognitive disability</li> </ul>	<i>Only for the sample of persons with VI</i>
Which of the following statements describes your vision the closest?	<ul style="list-style-type: none"> <li>• I do not have visual impairment or I only have a mild form of visual impairment</li> <li>• I have severe visual impairment</li> <li>• I am blind</li> </ul>	<i>Only for the sample of persons without VI</i>
Does any of your family members, current or	<ul style="list-style-type: none"> <li>• No, neither visual impairment nor other form of disability</li> </ul>	<i>Only for the sample of</i>

<p>former friends or colleagues have a severe form of visual impairment or another form of disability?</p>	<ul style="list-style-type: none"> <li>• Yes, a severe form of visual impairment</li> <li>• Yes, another form of disability</li> </ul>	<p><i>persons without VI</i></p>
<p>To which extent do you agree to the following statements:</p> <ul style="list-style-type: none"> <li>• I like to be with other people.</li> <li>• I prefer working with others than working alone.</li> <li>• I enjoy social gatherings just to be with people.</li> <li>• I value having relationships with other people.</li> <li>• I generally view myself as a person who is interested in establishing relationships with others.</li> </ul>	<ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Agree</li> <li>• Neither agree or disagree</li> <li>• Disagree</li> <li>• Strongly disagree</li> </ul>	<p>Items measuring sociability</p>
<ul style="list-style-type: none"> <li>• I like to continue doing the same old things rather than trying new and different things.</li> <li>• I like a job that offers change, variety, and travel, even if it involves some danger.</li> <li>• I like to experience novelty and change in my daily routine.</li> <li>• I am continually seeking new ideas and experiences.</li> <li>• I like continually changing activities.</li> <li>• When things get boring, I like to find some new and unfamiliar experience.</li> <li>• I prefer a routine way of life to an unpredictable one full of change.</li> </ul>	<ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Agree</li> <li>• Neither agree or disagree</li> <li>• Disagree</li> <li>• Strongly disagree</li> </ul>	<p>Items measuring innovativeness</p>

<ul style="list-style-type: none"> <li>• Travelling for holidays is important for me.</li> <li>• Travelling for holidays interests me.</li> <li>• I really enjoy travelling for holidays.</li> </ul>	<ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Agree</li> <li>• Neither agree or disagree</li> <li>• Disagree</li> <li>• Strongly disagree</li> </ul>	Items measuring product category involvement
<ul style="list-style-type: none"> <li>• I have an obligation to help others in need.</li> <li>• It is important to me to reach out to others who need help.</li> </ul>	<ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Agree</li> <li>• Neither agree or disagree</li> <li>• Disagree</li> <li>• Strongly disagree</li> </ul>	Items measuring altruism  <i>Only for the sample of persons without VI</i>
<p>How often in the past four weeks have you done the following activities?</p> <ul style="list-style-type: none"> <li>• Sport or physical activity such as an exercise class or swimming lesson at a local pool</li> <li>• Club, interest or activity group, church or other similar activity</li> <li>• Cultural or educational event such as the cinema, theatre, museum, talk or course</li> <li>• Eating or drinking out in a restaurant, pub, cafe or tearoom</li> </ul>	<ul style="list-style-type: none"> <li>• Not at all</li> <li>• Less than once a week</li> <li>• Once or twice a week</li> <li>• More than twice a week</li> </ul>	Items measuring community participation  <i>Only for the sample of persons with VI</i>
<p>Please read the following description of a holiday offer:</p> <p><i>These are no ordinary holidays. Blind and sighted people travel and discover the destination together, while everyone enjoys the benefits of the shared experience. The multi-day holiday is designed to be barrier-free and appealing to all senses, through specially arranged tastings, touch- and smell tours, nature experiences, or sightseeing tours. Every day, pairs are formed that consist of a sighted and a blind person. During the day, the pair participates in the activities together, including free-time activities.</i></p> <p><i>Sighted travelers are asked to share their eyesight by describing the world around to their blind partner. Blind travelers benefit from the freedom and independence, provided by this arrangement. They don't have to bring anyone to accompany them, as they will be joining a group of like-minded explorers. The sighted guides join not as carers but as fellow companions, willing to share their travel experience. Travelers of all ages, backgrounds and interests may join the group holiday. No previous experience with blindness or guiding is necessary, as simple instructions will be provided at the beginning of the tour.</i></p>		
Have you ever participated in a holiday or group travel, like the	<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	

one described in the offer?		
How interested would you be in participating in such a holiday?	<ul style="list-style-type: none"> <li>• Extremely interested</li> <li>• Very interested</li> <li>• Moderately interested</li> <li>• Slightly interested</li> <li>• Not interested at all</li> </ul>	Item measuring product interest
If the holiday offer was available in the place of your residence, what is the likelihood that you will book one in the next two years?	<ul style="list-style-type: none"> <li>• Certainly</li> <li>• Very likely</li> <li>• Likely</li> <li>• Likely not</li> <li>• Under no circumstances</li> </ul>	Item measuring adoption likelihood
<p>Please indicate to which extent you agree with the following statements in relation to the holiday offer described:</p> <ul style="list-style-type: none"> <li>• Participating in such holiday would provide more independence and freedom than other forms of holiday travel available to me</li> <li>• Participating in such holiday would provide a more outstanding experience than other forms of holiday travel available to me</li> <li>• Participating in such holiday would provide a more socially interactive experience than other forms of holiday travel available to me</li> <li>• I feel that participating in such holiday involves a high degree of uncertainty about the package's actual performance.</li> </ul>	<ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Agree</li> <li>• Neither agree or disagree</li> <li>• Disagree</li> <li>• Strongly disagree</li> </ul>	Items measuring relative advantage in terms of freedom, relative advantage in terms of experience, relative advantage in terms of social interaction, and uncertainty
What is your gender?	<ul style="list-style-type: none"> <li>• Male</li> <li>• Female</li> <li>• Other</li> </ul>	
What is your age in years?		
What is the highest completed level of your education?	<ul style="list-style-type: none"> <li>• Less than secondary school</li> <li>• Secondary school</li> <li>• High school (Matura / Abitur)</li> </ul>	



	<ul style="list-style-type: none"> <li>• Completed higher education</li> </ul>	
What is your country of residence?	<ul style="list-style-type: none"> <li>• Germany</li> <li>• Austria</li> <li>• Switzerland</li> <li>• Other</li> </ul>	
What would best describe the place of your residence?	<ul style="list-style-type: none"> <li>• Urban</li> <li>• Suburban</li> <li>• Rural</li> </ul>	