

Accommodating Travellers with Pets: Is Auckland Ready?

Dissertation

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Abstract

This dissertation explored the pet tourism market from a New Zealand accommodation operators' perspective and their key considerations when deciding whether to offer pet friendly services. In recent years, the literature has discovered that a pet's role has become increasingly important within families in modern society. Many pet owners now regard their animal companions as family members and desire to travel with them. The pet tourism market has grown significantly in developed countries, especially in North-western Europe and America. New Zealand is a pet loving country with 64 percent of households owning at least one pet, however there are few pet friendly accommodations available.

Existing literature has focused on pet tourists instead of accommodation operators. There is a gap in finding out how accommodation operators perceive the pet tourism market and considerations to accommodate pets. Recognising pet tourism as a social science, an exploratory research was conducted to gather Auckland accommodation operators' experiences, emotions and perceptions through nine in-depth interviews with 10 participants. Qualitative data obtained were coded and categorised through a thematic analysis method, deriving global themes that assisted in answering the research objectives.

The findings discovered that Auckland's pet tourism market is in its infancy, both in terms of supply and demand. There are pet tourists desiring to travel with pets, however the demand and revenue are minimal, thus operators were not motivated to grow their operations. Pet friendly operators treated accommodating pets as an additional service and did not advertise to attract more pet tourists. Non-pet friendly operators were reluctant to adopt a pet friendly model due to perceived risks and investments outweighing the benefits. Meanwhile, their pet friendly counterparts stated that investment was not necessary, and incidents were rare. This dissertation concludes with theoretical and practical implications to improve Auckland's readiness for catering to more pet tourists.

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Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

Signed Yiqi Chen

Date: 8th October 2018

1.0 Introduction

1.1 Background

Today, more and more households have at least one pet. Sixty-eight percent of American households are pet owners (Petfood Industry, 2017), up to 90 percent of pet owners consider their pets as family members and 68 percent treat them as well as children (Miller, 2013). The rapid growth of pet owners and the increasing importance of pets' role in human life have raised awareness of how this phenomenon contributes to various industries, such as tourism and hospitality.

The developing relationship between pets and humans has generated significant economic benefits to the multibillion-dollar pet care industry, allowing them to expand from commercialising basic food and shelter to pet wellbeing (Rudy, 2011). In 2015, around 10 percent of the sixty-billion-dollar pet care industry in America constituted pet services, such as walking and exercise (Gantz, 2016). Many pet owners have a powerful desire to travel with their pets, 40 percent stating they have travelled with pets before and are willing to spend money to bring them along (K9 Magazine, 2012). A major motivation to travel with pets is to enhance the owner's tourism experience (Carr & Cohen, 2009). In this regard, the pet care industry has become very lucrative and the tourism industry would also like a portion of this market. In 1999, the UK introduced a 'Pet Travel Scheme' which allowed pets from certain countries to enter the UK without quarantine (Newton, 1999). Canada followed with the first national certification programme for 'pet friendly' accommodations in 2003 (Canadian Tourism Commission, 2003). This evidence points to the realisation that pet tourism is beginning to cause significant changes around the world, with its commercialisation being a shared interest among developed countries.

The 'pet friendly' accommodation industry emerged to cater for the increasing number of tourists with pets, bringing potential business opportunities. Today, pet friendly policies are well developed in North-western Europe and North America (Carr & Cohen, 2009), these were the first places to develop pet accommodation and much research has been focused on their performance, while the progress of other nations remains relatively unknown. Accommodating pets is a direct business opportunity to increase revenue per room (Boroshok, 2016). Pet tourists on average stay for more nights (2.56) than non-pet tourists (2.1), and 76 percent become loyal to a hotel chain if their pets were welcomed

during their trip (Hansen, 2004). However, there are still accommodation operators who are worried about risks and potential issues outweighing profit gains, and thus close their doors to pet tourists.

1.2 Problem Statement

Despite the rapid growth in the pet owner population, pet-related tourism products and services are still in the early stages of development. According to previous studies which assessed pet owners' desire to travel with pets versus realising that desire, the finding is a strong desire to travel with pets, but most often they do not. A major obstacle is the shortage of pet friendly accommodation, both in terms of accommodation type and sources of information (Carr & Cohen, 2009). Accommodation is at the centre of nurturing pets' growing importance in human lives and their company when away from home. It is also an industry that has enormous potential to leverage off the strong pet and owner bond, where pet tourists are willing to pay an additional fee (Taillon et al., 2015). Therefore, this research is primarily focused on pet-friendly accommodation.

In addition, New Zealand is considered a nation of pet lovers, with 64 percent of households owning at least one pet (NZPFMA, 2017). However, there are merely 15 pet friendly accommodations in Auckland, the signature tourism destination, according to popular dog travel directory 'Bring Fido' (Bring Fido, 2017) which catalogues pet friendly accommodations for over 150 countries worldwide. This is in stark contrast to other cities, such as New York (367), London (96) and Paris (643). Bring Fido alone accounts for over 115,000 pet tourists a month worldwide (Taillon et al., 2014). Statistics on the percentage of pet friendly accommodations against total accommodation were not readily available, so only quantities could be compared at the time of this study.

Previous literature has mainly focused on the consumer perspective of pet tourism and accommodation providers, such as interpersonal constraints that influence pet owner's intention to travel with pets (Chen et al., 2014), perceptions on pet services such as transportation and information (Kirillova et al., 2015), other customers' attitudes towards pets in hotel settings and non-guest pets (Zhang, 2012), the criteria of pet friendly accommodation that pet tourists care most about (Racher, 2005). There is limited research that approaches pet tourism from an accommodation operator's perspective,

understanding why they may or may not be motivated to accept pet tourists. To the researcher's knowledge, there is no prior research on pet-friendly accommodations in New Zealand. This research aims to address these gaps through a series of research objectives targeted at New Zealand accommodation operators.

1.3 Research Purpose

This research aims to explore what the main considerations are for hospitality operators in Auckland when concerned with offering pet friendly services. To answer this question, several key aspects will be considered: pet tourism trends, the expanding market of pet friendly accommodation, potential profit from allowing pets in accommodations, and operational implications for hotels such as additional budget and labour costs. This explorative research will help to gain familiarity and insight into the currently unexplored accommodation operator's attitudes towards pet tourism, especially in a New Zealand context.

The first objective of this research is to gain insights into Auckland accommodation operators' general understanding and perceptions of pet tourism. The second objective is to explore the factors that operators consider in deciding whether to accept pet tourists. The final objective is to provide insights for the Auckland region to further develop pet friendly accommodations.

The value of this research is the insights into operational issues with accepting pets and how to overcome them, which has theoretical and practical implications for hospitality and tourism operators. A current state assessment of Auckland's position in the pet tourism industry will also be useful for mid to long-term development in this lucrative market.

1.4 Summary

As pets become more common and prominent in their role within modern society, industries like tourism and hospitality will no doubt transform to meet new demands. This is already evident in Western Europe and North America, where there have been policy

changes and significant growth in pet friendly accommodations. However, pet tourism-related products and services are still in their early stages of development. Accommodation is at the centre of pet tourists' bonding with their animal companions and has a huge potential for additional revenue and customer loyalty.

Existing literature has studied the topic of pet accommodation through the lens of pet tourists. This exploratory research attempts to take on the perspective of the accommodation operator. A qualitative approach was adopted, and data were collected in the form of in-depth interviews with accommodation providers. From the findings, this study aims to gain insights into key considerations for accommodations to accept or refuse pet tourists. In addition, this study also aims to open a dialogue for New Zealand to consider its readiness for future expansion in this seemingly lucrative market.

1.5 Dissertation Structure

This dissertation will first explore key concepts covered by the existing literature in Chapter 2 in order to set the scene for this research topic. Then, the methods to design, collect and analyse the primary sample data will be explained in detail in Chapter 3. In particular, the process of thematic analysis will be emphasised to transform sample data into organised themes. These organised themes will be discussed in depth as the research findings in Chapter 4, including its networks among each other, combining them into a core concept. Finally, the concept will be presented to answer the research objectives in Chapter 5 and practical and theoretical implications will be discussed in Chapter 6.

2.0 Literature Review

A literature review was conducted to assess the current state of academia around the topic of pet tourism. Reviewing existing concepts and past methodologies helped to identify key questions and approaches for further research. The following sub-sections will outline existing key concepts, issues identified relating to pet tourism and the context of the current New Zealand hospitality climate.

2.1 Key Concepts

2.1.1 Pets' Role in Human Life

Animals have always played an important role in the history of human lives. They originally served as food to be hunted. Later, the idea of domestication grew with domesticating wolves 14,000 years ago (Serpell, 1986). Since then, animals have been kept as livestock and used as transportation or tools for cultivation (Blouin, 2008). The upper class of society began the trend of keeping animals as pets, and it soon spread to the middle classes in the late eighteenth century (Irvine, 2004). According to Serpell (1989), a 'pet' is classed as an animal domesticated, tamed and kept as a personal favourite. The main difference between pets and other animals is the character of tameness gained through the domestication process. Pets are allowed to be at home with names given and they are not to be eaten (Thomas, 1983). Despite the most common pets being dogs and cats, there are various other companions such as rabbits, birds, horses and hamsters that have been domesticated as pets.

The emergence and spread of pets was the result of urbanisation and social development, and also the awareness of the benefit of a pet companionship (Blouin, 2008). According to Sable (1995), pets can enhance a human's feeling of happiness, security and self-worth, and reduce feelings of loneliness. Among the multiple reasons for humans to keep pets such as enjoyment, health and protection, companionship is the main reason (Smith, 2012). Pets participate and provide companionship in their owners' daily lives, even participating in family rituals and ceremonies (Hodgson & Darling, 2011). Pet owners would celebrate different anniversaries with their pets including buying birthday gifts for their pets and enjoying holiday activities together. During depressing family transitions,

such as illness or death, pets also provide mental support and contribute to recovery (Walsh, 2009).

The changing family structures of modern society contribute to the increasing importance of a pet's role in the family. For example, the rise in single person households, young couple families planning to have children later and have pets instead, and families with a single child wanting to have pets instead of siblings. Pets play an important role in completing a modern family structure by replacing members such as children and partners (Hodgson & Darling, 2011). According to Miller (2014), 68% of pet owners treat their pet as well as they treat their children. Although all members of pet-owning families bond with their pets, children are especially attached, particularly a single child (Clements et al., 2003). Children sometimes consider the relationships with their pets to be more important than some human relationships. According to Reaser et al. (2008), some children would prefer to live with their pets instead of their biological father or sibling. More than 75% of children in America grow up with pets (Rease et al., 2008) and being accompanied by pets can enhance empathy, self-esteem and cognitive development (Smith, 2012).

The awareness of the rapidly growing number of pets and the increasing significance of their roles in human lives have led many scholars to wonder how this changes human decisions and behaviour. Throughout the twentieth century, researchers have pointed out the importance of including the emotional attachment between pets and pet owners when examining and predicting how pet owners treat their pets (Stallones et al., 1990). Johnson et al. (1992) defined pet attachment as the degree of affection between pet owner and pet. It has been confirmed that pet attachment positively impacts pet owners' motivation to participate in different activities with their pet as well as their consumption of pet-related products (Hung et al., 2016). Strong attachment to pets has led pet owners to desire to spoil their pets. In 2017, dogs occupied 48% of all pet-owning households. Dog owners have been reported to spend the most on services compared to cats and other species. Most owners claimed their pet ownership would not be influenced by the state of their financial situation (APPA, 2017).

Moreover, pet attachment has transformed pets from something left at home waiting for their owner, to an inseparable partner. In the United States, 11% of pet owners bring their pets to their workplace, a 38% growth from 8% in 2014 (APPA, 2017). Pet attachment

also motivates pet owners to bring their pets on holiday (Hung et al., 2013). According to Carr and Cohen (2009), bonding with dogs makes owners feel safer and more relaxed and gain more pleasure from travelling. In fact, 28% of pet owners even responded that they prefer travelling with pets than their spouse (AAA Newsroom, 2010). In 2016, the Kennel Club conducted a survey and found that 96% of tourists believed the presence of dogs improved the atmosphere at tourism destinations (Visit Scotland, 2016). As pets continue to become important family members for many pet owners, so will the desire to integrate them into the owners' everyday lives, including going on holiday together.

2.1.2 Pet Tourism

People traditionally imagine family travel as tourism without pets, and pets are often left behind with friends, relatives or even in kennels (Meddaugh, 1994). Today, more and more pet owners perceive their dog as their best friend and an essential member of the household. Intimate attachment to their dogs has generated desire in owners to treat their pets as family members during holidays, in addition expecting their pets to be treated like guests at accommodations (Carr, 2014). Therefore, travelling with pets has become a common desire and the basis for pet tourism growth.

Evolving family structures with more attachment to their pets have led to the development of pet and owner activities (William et al., 2004). Pet owners would feel bad leaving their pet behind and instead more frequently take their dog out for holidays, dining and entertainment. Taking pets to restaurants and other public areas such as off-leash parks and dog-friendly beaches is common in European countries and America. Some restaurants even offer a specific dog menu such as 'Shake Shack' in Miami Beach and New York (Kirillova et al., 2015).

The enjoyment with their companions encourages pet owners to participate in tourism activities together, thus the emergence of pet tourism. When ranking the main reasons pet owners wanted to travel with pets, 45% of pet owners believed travelling with pets increases their satisfaction with the journey through companionship, while 19% of pet owners wanted to prevent their pets' stress of being left behind (Nieminen, 2015). According to Pen et al. (2014), travelling with pets could impact an individual's tourism experience. Feeling comfortable travelling with pets and sharing quality time with them

not only induces positive tourism experiences and customer satisfaction, but also creates revisit intention to destinations (Kirillova et al., 2015). A significant portion of time spent together is of course in an accommodation and its operators have a major part to play in providing a pleasant experience in the overall trip.

Recognising the potential of pet tourism, many tourism industries are not simply allowing pets but encouraging owners to participate with their pets (Carr & Cohen, 2009). In 1999, UK introduced a 'Pet Travel Scheme' which allowed pets from certain countries to enter the UK without quarantine (Newton, 1999). Recognising the demand for pet tourism, Canada followed with the first national certification programme for 'pet friendly' accommodations in 2003 (Canadian Tourism Commission, 2003). Further evidence of the expanding pet friendly tourism market includes major attractions that now allow pets, such as Whistler Olympic Park in Canada, Beauval Zoo in France, and National Park in the UK (Carr, 2017).

The APPMA (American Pet Products Manufacturers Association) report found that each year around 15 million Americans travel with their dogs and 51% of them claim that they would love to bring their dogs on every holiday if they could (Miller, 2014). In the UK, travelling with pets increases the cost by an average of GBP126 per pet tourist, and 16% of pet tourists are willing to pay GBP200 extra for pets. One in four pet tourists would pay the same amount to bring their dog as bringing another person (Visit Scotland, 2016). And promoting an activity or destination is more effective through mentioning that pets are allowed and there are opportunities to socialise with other pet owners (Hung et al., 2013).

Zasloff (1996) suggested that because of the extreme emotional bond and special interactions between dogs and their owners such as strolling, dogs provide an ideal model to study animal companionship. Since most pet tourists (84.3%) only travel with dogs (Farris, 2010), this research will focus on dogs and the impact on accommodations offering dog-friendly services, for example, the impact to operations due to dog behaviours such as barking.

Travelling with pets is becoming an international trend. Pet tourists used to be automatically allocated to smoking rooms during the early phases of pet friendly accommodation (Lötjönen, 2014). Now due to the trend of pet tourists willing to spend

more to stay with pets, the accommodation industry has paid more attention to improving pet-related services (Nieminen, 2015). The growing trend of pet tourists has raised an important concern of accommodating pets while travelling. The accommodation industry has acknowledged this potential market with the rise of pet friendly accommodations.

2.1.3 Pet Friendly Accommodation

The motivation of travellers can be divided into two main factors. Push motivation is intrinsic to the travellers themselves, such as escaping from daily routine, enjoying quality time with family and going on an adventure. Pull motivation can emerge from the attractiveness of the destination, such as stunning views, fun activities and luxurious accommodations (Dotson et al., 2011). Therefore, accommodation operators who continue to innovate their service or infrastructure to satisfy guests' specific needs can benefit from creating pull motivation for guests (Dotson & Hyatt, 2008). In the United States, 30 million pet owners every year travel with dogs and the numbers are growing. When travelling with pets, over 64% of pet tourists wish to stay at an accommodation instead of a friends or relative's house (TripAdvisor, 2013). According to Nieminen (2015), 64% of pet owners have responded that they are willing to stay longer in accommodations that allow pets. According to Lotjonenm (2014), in recent years, there are even business travellers who started taking pets on business trips. Due to the increasing number of pet tourists travelling with their dogs, many accommodations have begun to transform themselves into pet-friendly accommodations and to offer better service targeting this demographic (Lötjönenm, 2014).

Pet friendly accommodation is defined as an accommodation property allowing certain types of pets to accompany customers while they stay. This can include permitting pets in certain areas within the property or providing appropriate fencing to contain pets outside of the accommodation (Kirillova et al., 2015). Of course, guide dogs would be an exemption as a person with a disability is entitled to be accompanied by an assistance dog. In many countries, it is unlawful to impose a charge or discrimination against guide dogs (Zhang, 2012).

Accepting pets is a direct opportunity to increase revenue per room due to the extra fee and deposit they can charge for pet stays. Moreover, accommodations can raise their

occupancy rate without discounting rooms (Boroshok, 2006). The accommodation industry maximises their revenue and overcomes the increasing competition with other pet friendly accommodations by offering additional pet services on top of guest rooms (Taillon, 2013). For instance, the W hotel in Seattle provide pet-related items and food, such as special birthday cakes and signature pet beds. The Ritz-Carlton hotel in New York provides Burberry pet raincoats for their VIP customers. The Nine Zero hotel in Boston offers packages that include dog walking and even massages (Miller & Washington, 2009). The hotel of Loews Ventana Canyon Resort not only has a closet in their rooms filled with dog goodies and necessities but also provides a special menu and room services for pets (Miller, 2008). The oldest dog association in Scandinavia, the Finnish Kennel Club, signed a cooperation contract with the Restel Oy, which owns 49 hotels and 240 restaurants, to allow the pets of club members into all their hotels and even restaurants (Kennelliitto, 2013). Disney opened its first luxury resort in 2010 which can accommodate 270 dogs. The resort not only provides luxury pet care but also specific pet play areas, spa rooms and special beds (VMSD, 2010). Moreover, many upper-class hotel chains are trying to loosen pet restrictions to allow tourists smoother travelling with dogs. The first hotel chain in the United States, Kimpton Hotels, insists the only pet policy is that the pet must fit through the hotel's door, then they are welcomed with no additional fees (Nieminen, 2015). All these types of accommodation target pet tourists who wish to spoil their pets on holiday and are willing to pay for it.

Pet friendly accommodations have been expanding constantly and rapidly in response to the global trend of pet tourism and the potential revenue stream. The number of pet friendly accommodations has increased by more than 25% since 2004 (Racher, 2005). According to *Pets on the Go*, there were already over 20,000 pet friendly accommodations in the United States in 2012 (Miller, 2014). Pet-friendliness enables hotels to target a new customer segment and distinguish itself from competitors (Kridler, 2005). However, despite the constant increase in the number of pet friendly accommodations, more than half of pet tourists still believe that it is difficult to find a suitable pet friendly accommodation, 35% of them having tried to sneak their dogs into an accommodation (Miller, 2014). According to Zhang (2012), finding pet friendly accommodation and transportation are two major considerations when pet tourists are making travel plans. In 2011, the difficulty of finding satisfactory pet friendly accommodation has taken over the expensive airline fee as the biggest concern for pet tourists. Aside from luxury accommodations providing pet service for the upper market, most pet friendly

accommodations are either in rural areas or only allow pets in lower quality rooms. While finding a pet friendly accommodation, above 90% of tourists rely on the Internet and word of mouth, the rest would use printed hotel guides or information centres (Dotson et al., 2011). There is a shortage of pet friendly accommodation both in terms of accommodation type and sources of information (Carr & Cohen, 2009). Over 51% of pet owners mention the main reason they do not bring their pets on holiday is that they feel difficulty in finding suitable pet friendly accommodations (TripAdvisor, 2013). Facing the rapid growing demand of pet tourists, the accommodation industry is now encountering the challenge of transforming itself into suitable pet friendly accommodations.

2.1.4 Hotel Pet Policy

Despite the increasing number of pet tourists, most hotel customers, up to 98%, do not actually bring pets (Racher, 2005). Since accommodation operators need to look after pet and non-pet guests, a clear regulation needs to be in place to protect both parties from potential conflicts (Zhang, 2012). According to Morovati et al. (2008), the attitude towards having dogs around is significantly different between non-pet owning guests, guests with pets, or guests wanting to own a pet. Non-pet customers may become irritated in the presence of dogs. According to most pet friendly accommodations, dog-related problems and inconveniences are less than expected, despite a few complaints relating to the common issues of barking. Serious incidents such as biting or allergies are very rare, as long as accommodations have established a clear and effective set of pet policies (Zhang, 2012). Pet policies could be the first line of defence when facing a pet-related series of potential risks, as it is a guideline for acceptable behaviour when guests check in (Rooney & Smith, 1996).

Hotel pet policies are established to limit a dog's behaviour and provide a standard of services for both pet friendly and non-pet friendly guests (Zhang, 2012). Some accommodations may ask pet tourists to sign a copy of the pet policy while they are checking in and ask for their contact number in case pet-related issues arise (Chipkin, 2006).

Hotel pet policies mainly consist of several aspects. First, restrictions to dog activity areas, and that they must be leashed in communal areas and some recreational areas which require disease and hygiene control, such as swimming pools and spas (Zhang, 2012). Safety is the biggest concern not only for the non-pet tourists but also for the pets themselves. For example, Four Seasons hotel requires all pets to be kept on a leash unless in the guest room (Pet Travel Inc, 2017). Second, pet owners must pick up after their pets, which apparently pet owners obey very well in general (Alisau, 2004). Third, pet tourists are allocated specific rooms with limited choices. Although there are accommodations who welcome dogs to all kinds of guest rooms, most prefer to group designated pet tourist rooms and leave the others for human-only guests. Some accommodations tend to welcome pets into rooms located on the first floor or near elevators. Fourth, there is an extra charge or deposit for pet-staying based on the location and type of accommodation, due to potential pet damage incurring costs. Some accommodations have a non-refundable extra cleaning fee for pets (Chipkin, 2006). There are even pet friendly accommodations with pet policies to deep clean after each checkout as later guests may have allergy problems (Zhang, 2012). Moreover, dogs are not allowed to be left alone in the guest rooms or restricted in fenced areas (Alisau, 2004). The last common policy is to restrict certain breeds of aggressive dogs in consideration for the safety and fear of other customers. For example, Four Seasons hotel only allows small pets less than fifteen pounds and a maximum of two pets per room. Ritz Carlton hotel only accepts pets between ten to thirty pounds. Homestead hotel allows all pets except certain more aggressive breeds (Zhang, 2012).

Facing competition in the market, accommodations are adopting pet policies to meet or exceed customer expectations. However, inconsistencies in what the pet owners agree to and what they allow their pets to do have been of much controversy. Many non-pet tourists will refuse to stay at pet friendly accommodations on the basis that they do not believe all pet owners follow the rules behind closed doors (Belcher, 2011). According to Trip Advisor Sniffs (2010), 57% of pet owners hold the viewpoint that it should be acceptable to bring dogs into accommodations, meanwhile 59% non-pet owners believe otherwise.

In summary, there are complex topics relating to travelling with pets, such as pet tourism, pet friendly accommodations and hotel pet policies. These key areas have been researched at different levels by scholars.

2.2 Issues Related to Pet Tourism

2.2.1 Mentality of Travelling with Pets

Facing the development of pet tourism, multiple scholars started to study pet tourism related topics. Greenbaum (2004) focused on studying pet owner's decision-making processes and behaviours when they participate in activities with their pets. He pointed out that pet owners would consider their dogs' preferences and abilities, the environment of the destination and the attitudes of other participants while they are making the decision to bring their dogs or not. Miller and Howell (2008) pointed out that although there are more and more pet owners wanting to travel with their pets, one of the reasons why they do not do so as frequently as they desire is due to the pressure from other tourists.

Further research related to trip planning with pets has since been conducted. Chen et al. (2011) revealed that taking pets travelling requires additional planning. Through the theory of planned behaviour, they examined the decision-making process of pet tourists to bring pets. They acknowledged that pet tourists are aware of the difficulties of travelling with pets but still believe that they would have the ability and resource to overcome those difficulties. Hultsman (2012) tried to explore how animal companions impact their owner's behaviour while anticipating holidays and suggested that both pet owners and pets should go through some training exercises.

In 2009, Carr and Cohen started to look at the accommodation provision of pet tourism. By studying 311 Australian dog owners, they found some pet-related constraints, such as extra costs and long preparation time, which could cause the pet owners to not travel with pets as they would have liked. Although the study explored from the pet tourists' perspectives, the research has implications for practitioners, such as the strong desire for a wider variety of pet friendly accommodations. Bunderson (2010) found that many pet owners were prevented from travelling with their pets because of accommodation pet policies, such as a limitation on breeds, non-barking policy and extra fees.

Huang, Chen, and Peng (2016) concluded that although there are rapidly increasing numbers of pet owners who are attached to their pets and willing to spend significant money on pet-related products and services, travelling with pets on holiday is still a challenge. The challenges include lack of agility with pets, other tourists' resentments

and restrictions of the destination (Carr & Cohen, 2009; Gillespie et al., 2002; Hultsman, 2012). Dog owners are especially less likely to bring their dogs on holiday when they feel it is beyond their ability to look after them (Hung et al., 2016). Therefore, it is clear that dog owners have to overcome their anxieties to travel with their pets, whether through careful planning or extra spending. The outcome of this research may provide insight as to what accommodation operators perceive as risks with pets, their policies to prevent risks, and how this may affect anxiety for dog owners.

2.2.2 Uptake of Pet Tourists at Accommodations

Most pet tourists would be influenced as to where they stay based on their pets (Farris, 2010). In other words, allowing for dogs could easily attract pet tourists, bringing higher occupancy and additional revenue from pet-related products and services. However, according to pet friendly hotels, only 2% to 5% of guests would bring their dogs (Miller, 2014). Up to 66% of pet tourists choose to stay at friends or relatives' homes while they are travelling with dogs, and only a small percentage of the rest would stay at pet friendly accommodations (Zhang, 2012). This is due to several factors: not being able to find a suitable accommodation, not being able to afford the pet friendly premium, and anxiety around possibly disturbing other guests during their stay.

2.2.3 Operational Costs to Accommodate Pets

Although hotels aim to maximise profits by offering pet-related services, they also face increased operational costs when accepting pets. This becomes a budget issue that hotels try to minimise through potential cost savings (Taillon et al., 2014). As most guests are non-pet tourists, the potential costs and risks associated with offering pet-related amenities often trouble operators (Dotson et al., 2011). For instance, dog barking is disruptive to other guests and can be contagious to other dogs (Chipkin, 2006). To provide every guest with a good night's sleep, extra renovation to soundproof the walls may be needed (Marshall, 2005). Dog attacks are also considered the most serious among potential problems, leading to lawsuits against the hotel operator. Therefore, pet-related facilities such as fences and cages may be needed (McNally, 2008). An increase in cleaning costs is often inflicted as well as each room requiring strict sanitisation after a pet tourist departs. Additional cleaning activities include carpet shampooing, removing

dog hair and restoring the room to allergen-free standards. Guests would expect accommodations to have facilities specifically to wash and dry dog-related linen (Marshall, 2005). Therefore, more equipment will be necessary, plus furniture tends to need replacement more frequently due to scratches and distress.

The above are all common budget increases due to investing in pet friendly operations. These extra costs are often offloaded onto pet tourists' travel expenses by adding an extra room fee for pet tourists to cover the expenditure (Karp, 2007). Accommodations may use this opportunity to not only charge fees to cover costs but possibly obtain extra revenue from their customers.

2.2.4 Labour Costs to Accommodate Pets

Accommodating pets not only incurs additional budget requirements but also labour costs. According to Wolff (2003), as most guests do not bring pets, accommodation operators should be sensitive to those non-pet tourists, since they may not know the accommodation allows pets. Usually there is an increase in staff numbers to conduct pet services such as dog walking and cleaning, however, the majority of the additional labour cost is, in fact, enforcing pet policies. For example, labour is required to supervise and monitor restricted dog areas and ensure guests are conforming to rules such as leashing their dogs in communal areas (Zhang, 2012).

Pet friendly accommodation operators also must train their staff on pet policies and how to handle pets (Bunderson, 2010). In addition, staff must be more alert and proactive in communicating with guests, reminding them of rules, such as hanging the 'pet in room' door tag to alert housekeepers or checking dog breed and size during check-in (Marshall, 2005). Cleaning staff need to be trained on additional procedures, such as removing washable couch covers, preparing extra towels and even placing dog treats (Rhodes, 2010). Receptionists are expected to ask whether guests prefer a pet friendly or non-pet friendly room based on health-related considerations such as allergies. This adds an additional layer of complexity when offering rooms to guests (Marshall, 2005). The above-mentioned labour investment has deterred some accommodation operators, as they wonder why not keep it simple and not allow pets.

2.2.5 Meeting Pet Tourist Expectations

From the perspective of fulfilling pet tourists' demand, a summary of the most important aspects of a pet friendly accommodation has been provided by research in Canada. First, hazard-free rooms are important as pet owners seek a safe environment for their pets. For example, mini-bars in the guest room should not contain chocolate which is fatal to dogs or at least it should be kept in an unreachable place. Some pet tourists are satisfied with simply a fenced yard or an enclosed outside area for their dogs to run around (Rhodes, 2010). It is not difficult to empathise that pet owners who travel with dogs are unwilling to separate from their dogs during holiday. Therefore, an enclosed outside area enables dogs to have enough exercise while within reach. Second, pet tourists seek a clearly outlined pet policy since they do not want to accidentally incur any additional charges due to breaches. Especially higher-income pet owners tend to be more mindful of their surroundings when travelling with pets, compared to medium to lower income pet tourists (Dotson et al., 2011). In this case, pet tourists require a hotel pet policy that is easily accessible and understandable. Other aspects include close proximity to secondary services such as pet stores or daycare. These aspects would impact pet tourists' decision making while selecting an accommodation. Additionally, complimentary items such as waste bags and paw wipes could also bring satisfaction to pet owners (Racher, 2005).

Nieminen (2015) continued exploring pet tourists' viewpoints on pet friendly accommodation, based on their individual experiences. He found that some pet tourists wish the guest rooms are as tidy and clean as their human-only counterparts, however in many cases, they are of inferior condition. He also found that some pet tourists wish to be situated further away from other dog occupied rooms, with doors that cannot be opened by pets.

2.2.6 Impact on Non-Pet Tourists

It is necessary for accommodation operators to consider the safety and happiness of non-pet tourists as well. Previous research shows the top 10 ranked attributes influencing choices in the accommodation are location convenience, service quality, reputation, staff training, price, sanitation, value for money, security and room standards (Dolnicar & Otter, 2003). According to a previous study, accommodating pets potentially influences reputation, sanitation, value for money and security factors. The most common

annoyances for non-pet tourists are allergy issues and loud noises. Non-pet tourists are also annoyed with pet owners not picking up after their pets or bringing them to inappropriate areas. It is up to the accommodation to find a happy medium between both types of guests (TripAdvisor, 2010).

Belcher (2011) found that pet owners wanting to travel with pets would like to see the accommodation advertised as allowing pets before they consider it as an option. However, advertisement to allow pets usually impacts on non-pet tourists, especially those on business trips or staying with family, because these groups of people would feel less certain about having a good night's sleep. Belcher concluded that pet advertisement does not attract significantly more pet tourists but instead turns non-pet tourists away. This is a sign that tourism research needs to focus on non-pet tourists as much as pet tourists. Zhang (2012) pointed out that non-pet tourists are less likely to choose dog-friendly hotels and would not return to pet friendly accommodations once they have had a negative experience with dog guests.

Compared to the elderly, younger guests usually have higher tolerance towards having other dogs around in pet friendly accommodations (Zhang, 2012). Based on these findings, she suggested that losing business is a major risk for dog-friendly hotels and a clear pet policy plays a significant role in reducing this risk. This is similar to separating smokers and non-smokers into designated rooms and areas, as well as in some cases family friendly and non-family friendly accommodation.

2.2.7 Summary of Prior Research

Although there are different challenges from multiple angles, whether to travel with pets is still a significant topic that needs to be explored, especially since pets can affect the quality of an individual's tourism experience (Chen et al., 2011). How the accommodation industry caters to the growing demand of pet tourists and gains benefits from it continues to be the big question. Revenue and the costs of accommodating pets are difficult to track. Although many accommodation providers would charge extra for pets staying and other related services, the cost of disturbing other guests such as barking, allergy and extra labour does exist (Nieminen, 2015). According to Campoy (2010), there is a pet friendly luxury hotel which invested over 1.5 million US dollars but was forced

to close after the first two years due to a loss of over \$200,000. Dallas Dog Park closed in 2010 because the overhead costs outweighed the profit. However, despite the risk of losing business from accommodating pets, pet friendly accommodations continue to emerge and grow (Karp, 2007). Instead, Sullivan (2013) emphasised that the best way to cater for pet tourists is to remove all the restrictions and say yes to all. Therefore, prior literature does have conflicting arguments, yet one theme in common is that they mainly begin from the tourists' perspective, rather than focusing on the operators' perspective. This research attempts to fill this research gap by obtaining feedback from operators.

2.3 The New Zealand Context

New Zealand's tourism market is, in fact, dominated by the domestic market, bringing in \$21.4 billion NZ dollars of economic contribution compared to its \$14.5 billion NZ dollar international counterpart. It is also growing at four percent per annum, a stark contrast to the minor declining international market at negative 0.9 percent (MBIE, 2018).

New Zealand is a nation of pet lovers, with over 4.6 million pets outnumbering the human population. Around 64 percent of Kiwi households have at least one pet, more than anywhere else in the world. Four in five New Zealand families with children aged from 9 to 17 have pets and these families overwhelmingly consider their pets as family members. Between 2011 to 2015, the number of pet dogs increased by nearly 50% (New Zealand Companion Animal Council Inc., 2016). According to the Auckland Council (2016), there are 114,519 dogs in Auckland in 2015-2016 compared to 109,840 in 2014-2015. Over 58% of New Zealanders who do not own pets would like to get one in the future.

Companionship is the main reason why New Zealanders have pets, and pets contribute to their owners' health and wellbeing. In 2016, the total expenditure on pet-related services and products was \$1.8 billion, an increase from \$1.6 billion in 2011. In 2015 the estimated annual expenditure on dogs from each household reached \$1,686 dollars. Pet services such as walking and minding accounted for 55% of this expenditure. Most pet-owning households have an accumulated earning of \$90,000 a year or more (New Zealand Companion Animal Council Inc., 2016). This indicates that spending power is relatively high among pet-owning households in New Zealand.

In New Zealand's booming tourism sector, shortage of accommodation is the highest priority to be supported by additional infrastructure. According to Bradley (2017), the government has suggested that if estimates in supply and demand are accurate, New Zealand will be lacking more than 4,526 hotel rooms across the country in a mere number of years. In 2016 the shortage of commercial accommodation was a serious issue in Auckland and Queenstown, with those available being too expensive (Bradley, 2017). This is a phenomenon worth noting as the local market may see pet tourism as a growing trend but does not feel the immediate need to cater to pet tourists as they already have high occupancy rates with non-pet tourists. In the situation of demand strongly outweighing supply, accommodation operators may be too busy with guests, or do not want pets to affect business, and thus are not resilient to changes in the business model and associated investments. Therefore, the market climate may have allowed them to remain risk-averse and disregard the need to embrace risks associated with accommodating pets.

2.4 Summary

There is evidence to believe that a pet's role in modern society is growing and pet tourism has become an international trend. The desire to travel with pets is strong and accommodations are a key element to whether pet owners are willing to fulfil this desire or not. Although accommodations are evolving to cater for this new demand, many obstacles still exist to motivate more pet tourists without jeopardising budget and existing customers. Existing literature has mainly focused on pet tourists' perspectives and their expectations for accommodations. Recommendations on renovations and additional services have been based on hypothetically meeting customer demands. However, it is also important to examine this topic from an operator's perspective.

As a nation of pet lovers and a growing domestic tourism market, New Zealand is a prime candidate to evaluate how accommodations have responded to the pet tourism market and whether their challenges, if any, reflect those of their overseas counterparts. Additionally, there have been no relevant studies specific to New Zealand, which begs an exploratory approach to discover valuable insights for the local industry.

3.0 Methods

The previous chapter on literature review revealed research gaps to be answered about pet tourism. This research desires to take on the perspective of accommodation operators and conduct a qualitative study for the Auckland context. The following sub-sections will outline the procedures to conduct this research. This includes establishing the research aim and objectives, design of data collection, instrument and sampling, research process, method of analysis and a personal reflection of this journey.

3.1 Research Aim and Objectives

The aim of this research is to explore the key considerations for accommodation operators in Auckland when concerned with offering pet friendly services. According to the existing literature, there has been limited research into pet friendly accommodations, especially from the operator's perspective. The research theme of pet tourism exists yet is not well known here: accommodation operators in Auckland and their perspectives on allowing pets. Therefore, this research adopts an exploratory approach, which is the most suitable in this scenario.

Mason et al. (2010) pointed out that a variety of tourism facets have yet to be understood or require a fresh perspective due to their being outdated. When considering these kinds of topics and themes, the exploratory approach is increasingly employed by tourism researchers. The exploratory study approach is generally agreed to be an initial research on addressing a question, problem or concern that lacks any previous research or is under-researched. It is practical to develop an initial understanding of a phenomenon and therefore plays an important role in defining concepts, refining questions and providing a platform for further studies (Hartmann & Hedblom, 1979; Creswell, 2003, 2009; Sarantakos, 2005). This study acknowledges the growing trend of pet friendly accommodation in major overseas cities, such as London and New York, and wanted to compare with Auckland which is the largest city in New Zealand. Therefore, an exploratory study was conducted to achieve the following objectives:

1. To gain insights into Auckland accommodation operators' general understanding and perceptions of pet tourism.

2. To explore the factors that operators consider when deciding whether to accept pet tourists.
3. To provide insights for the Auckland region to further develop pet friendly accommodations.

3.2 Data Collection Design

This study adopted interpretivism as its research philosophy. The most frequent approach when conducting exploratory research in the social sciences is the qualitative approach (Creswell, 2009). This is a highly qualitative study where insights were obtained through understanding the interview participants' experiences, emotions and perceptions. Open-ended questionnaires, in-depth interviews and focus group interviews are deemed most appropriate for qualitative studies, as all three techniques allow participants to provide 'open-ended' comments and produce in-depth details required by this approach (Frankfort-Nachmias & Nachmias, 1996; Finn et al., 2000). According to Mason et al. (2010), in-depth interviews can generate information beyond focus group interviews and open-ended questionnaires, and thus have been adopted by this research. By approaching tourism as a social science, in-depth interviews were considered most suitable to understand the mentality of operators.

Qualifying respondents were interviewed through designated questions, which act to stimulate further conversation using probes. Practice interviews revealed that the most effective way to record an interview was using a digital recorder, which allowed the interviewer to focus more on the responses and only taking down simple notes for further discussion. Taking notes can make interviewees feel valued and therefore is a useful mechanism for them to open up with more information.

3.3 Research Design and Instrument

The research design includes question design, methods of data collection design, sampling decisions and pilot testing (Cooper & Schindler, 1998). Designing an exploratory research begins with considering the information to be gathered based on the research aim and objectives, then forming the questions to obtain the information (Mason

et al., 2010). To understand what impacts accommodation operators' decision making in allowing pets, several key aspects were considered, including pet tourism trends, pet friendly accommodation market growth, potential revenue through accommodating pets, and operational implications for hotels, such as additional budget and labour.

In terms of question design, the interviews first established whether the respondents acknowledged the emergence of a pet tourism market. For instance, whether they have received enquiries from pet tourists about pet friendly rooms and services or noticed any pet tourists willing to pay additional fees to bring their pets. Second, factors that operators considered to decide whether to accept pet tourists were explored. The foremost was whether the operator had the capability to deliver this service. For example, did they have existing pet policies, and if not, how deep was their understanding of such policies and were they confident to design and execute them. This discussion assessed an operator's resilience towards additional costs, labour and tourist requirements. Finally, the interview attempted to gather opinions as to whether the operators believed accommodating pet tourists would help them become more competitive and profitable. Also, whether this competitive edge would be sustainable and whether its benefits outweighed the additional investment.

Overall, the question design purposely began with introductory questions, then lead to deeper probing questions to achieve the research aim and objectives (see Appendix A for the interview guide). All interview questions were peer-reviewed by the researcher's supervisor and tested on relatives who also own accommodations. Practising and testing the interviews ensured that the prepared questions and procedures could provoke the information required, although this study did decide to omit a more formal pilot study.

3.4 Sampling Design

The purpose of this research was to gain in-depth viewpoints from accommodation operators in Auckland. Therefore, purposive sampling was an appropriate approach to generate the required data. Purposive sampling requires careful selection of subjects and can target those who hold the required data (Mason et al., 2010). Upon listing potential accommodation operator candidates in Auckland, sample size was another issue to be considered. According to DeRuyter and Scholl (1998), qualitative researchers tend to

acquire small numbers of respondents, since compared to the breadth of the research, qualitative research is more focused on the depth. This research aimed to achieve eight to ten samples for in-depth interviewing.

3.5 Research Procedure and Data Collection

In the actual sampling process, initially the researcher catalogued Auckland's pet friendly accommodations through websites and agencies including Booking.com, Hotel.com, Trip Advisor and pet-related websites such as Wotif and Pet Can Come Too. Combining the results, there were a total of 15 pet friendly accommodations in Auckland. Then, based on the 15 pet friendly accommodations, a list of 15 nearby accommodations with similar pricing and rating but non-pet friendly was obtained. Potential participants were approached via email, which contained a formal introduction to the researcher and an explanation of the research purpose via a participant information sheet (see Appendix B). Those willing to participate signed a consent form to reinforce their privacy in the subsequent analysis and publications (see Appendix C). Operators who did not respond were reminded twice by email, then the researcher attempted to phone them.

There were qualifying questions for interested participants to confirm that they had a deep understanding of their operations and could represent the accommodation in answering pet tourism related questions. Eventually, there were in total 10 participants representing five pet friendly accommodations (two were from one accommodation group) and four non-pet accommodations. For privacy purposes they have been allocated pseudonyms in this study (see Table 1). They were either owners managing the accommodation themselves, or staff employed at a managerial level. The accommodation types included hotel, motel, holiday house, holiday inn and holiday lodge. This research tried covering multiple types of the accommodation spectrum to increase the sample value. In addition, unique samples such as vintage homes, beachside properties and accommodations that had either spread out or side-by-side rooms were included.

Qualified participants were asked for a convenient location and time to conduct the interviews. As the location of data collection could impact the generation of data (Decrop, 1999), it was important to conduct interviews at familiar locations, such as their workplace, and during convenient hours. Upon meeting the participant, the researcher

informed them that they reserved the right to end the interview at any time. Prior to asking formal interview questions, there was some informal chatter with the intention to relax the participant and build rapport (Fontana & Frey, 2000). The participants were all required to sign the consent form prior to initiating the interview. The researcher took notes during the interview but mainly focused on listening to the participants, encouraging them to provide additional viewpoints following designated questions. Interviews were voice recorded and later transcribed for analysis. The data collection took place throughout February to April 2018.

	Fictional Name	Accommodation Type	Pet Allowance	Source
1	Wedge	Holiday Houses	Both	Booking.com
2	Biggs			
3	Lando	Guesthouse	Non-pet friendly	Booking.com
4	Hera	Lodge and Cottage	Pet-friendly	Booking.com
5	Chewie	Apartment	Pet-friendly	Wotif
6	Han	Hotel	Pet-friendly	Petscancometoo
7	Luke	Holiday Lodge	Non-pet friendly	Booking.com
8	Talzin	Motel	Non-pet friendly	Booking.com
9	Leia	Motor Lodge	Non-pet friendly	Booking.com
10	Annie	Holiday Inn	Pet-friendly	Hotels.com

Table 1: Participant information with pseudonyms

3.6 Data Analysis

Selecting an analysis approach for qualitative data should orient towards understanding the participant's experience and meaning behind what they have provided. Thematic analysis and content analysis are two common approaches to capture insights within data. These two approaches are known as the most popular qualitative approaches but can produce high-quality results (Crowe et al., 2015). This research used open-ended questions on what the main considerations for hospitality operators are in Auckland when concerned with offering pet friendly services, without the ability to pre-empt or predict the results. Both thematic analysis and content analysis are suitable for these types of exploratory research questions (Vaismoradi et al., 2013). Thematic analysis and content analysis, instead of being regarded as dichotomous, are on a continuum. However, content analysis only reduces the data into categories; thematic analysis takes it a step further by exploring the relationships and meanings behind the categories to identify themes.

According to Braun and Clark (2006), thematic analysis is theoretically a more flexible method that can discover emerging themes by organising, describing and interpreting qualitative data. While analysing transcripts, thematic analysis requires the researcher to not only focus on what the participants say but also what they think. Therefore, thematic analysis is used to interpret latent meanings by focusing on understanding the participants' experiences (Crowe et al., 2015). Content analysis instead relies on established categories and identifying the frequency by which they appear (Joffe & Yardley, 2004).

To answer the research questions, this research conducted in-depth interviews with 10 participants from nine accommodations to share their viewpoints based on their experiences and assumptions of pet tourists. The type of accommodation they belonged to varied, so their experiences were also unique. Instead of looking for commonalities among them, a deep understanding of their opinions in relation to their experiences is more valuable as findings. The sample size of this research was only ten participants, which may not satisfy the necessary frequency of content analysis and therefore, this research adopted a thematic analysis approach.

Walters (2016) amalgamated best practices for thematic analysis into a six-phase iterative approach. Data analysis for this research adapted Walter's guidelines and conducted it through six steps as outlined below.

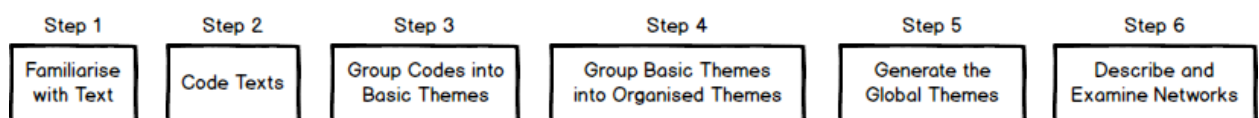


Figure 1: Illustrative process of adapted thematic analysis approach (Walters, 2016)

Step 1: Familiarise with Text

The transcripts were reviewed individually to gain a better familiarity with content. Any early correlations and deeper meanings that presented themselves were noted. Also, the researcher described any overarching opinions that were obvious, such as non-pet friendly operators are unanimously pessimistic about allowing pets and implementing pet policies.

Step 2: Code Texts

This step involved repeatedly reviewing individual transcripts to find trends, such as similarities and differences, recurring words, ideas and emotions. For instance, “cleaning” and “complaints” were coded as they often appeared in comments. Any conflicting sentences or anomalies were also coded as a point of interest. For instance, one operator refused to charge for damages because a resultant negative online review was not worth it. This step was time consuming and transcripts were re-read and coded until such a point that newer codes diminished in value.

Step 3: Group Codes into Basic Themes

Once a broad set of codes was revealed, their context was analysed, and similar codes grouped to answer the interview questions. The researcher utilised post-it notes to visualise interview questions and their associated basic themes (see Figure 2). Themes from accommodation types were identified using “PF” for pet friendly and “NPF” for non-pet friendly. These form the basic themes to be explored further and then merged with other basic themes.

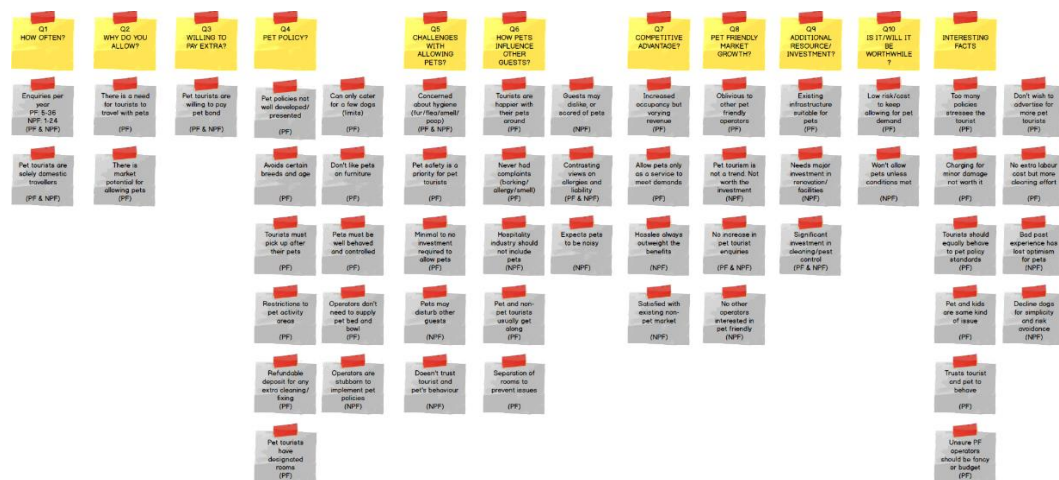


Figure 2: Basic themes (in grey) organised by interview questions (in yellow). Please see enlarged version in Appendix D.

Step 4: Group Basic Themes into Organised Themes

Like formulating basic themes through grouping codes, organised themes were created by clustering basic themes. An organised theme should contain sufficient information to formulate a statement about a phenomenon, which could in turn partially answer the research question. Again, post-it notes were used to categorise basic themes to form organised themes (see Figure 3).



Figure 3: Organised themes (in yellow) with clustering basic themes (in grey). Please see enlarged version in Appendix E.

Step 5: Generate the Global Themes

Several organised themes should be able to reveal an answer, or global themes, for the research topic. Organised themes can remain mutually exclusive to one another, but all have connections to the global themes. The global themes can be regarded as a conclusion for the research. This research has concluded with four global themes: 1) market immaturity, 2) fear of losing customers, 3) fear of operational difficulties and 4) improving readiness. A network diagram outlining the research questions in relation to global themes and their subsequent organised themes was generated (see Figure 4).

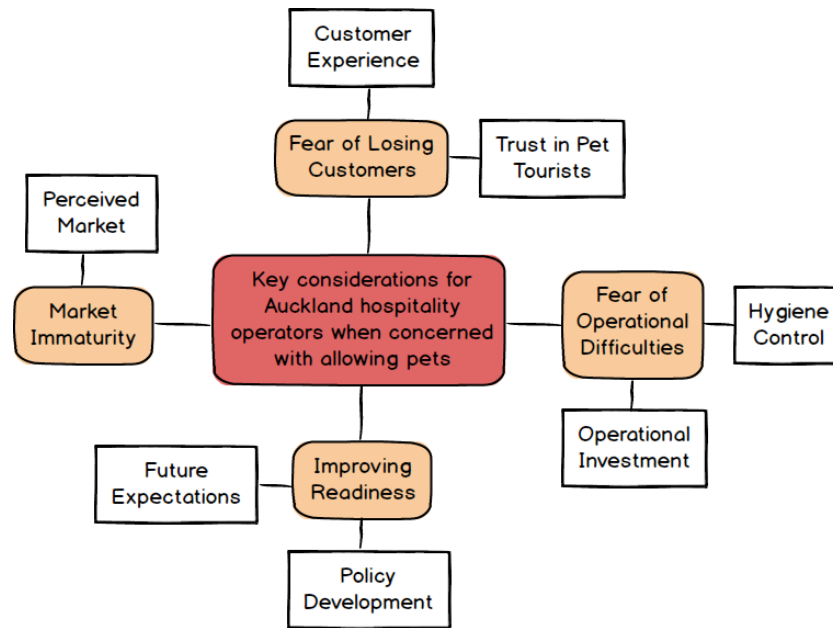


Figure 4: Global themes and their organised themes

Step 6: Describe and Examine Networks

Finally, to complete the thematic analysis, the networks that formed the organised and global themes were described and examined. Using basic themes and excerpts from transcripts, this step enriched the relevancy of the constructed organised and global themes. This is similar to supporting an argument using examples as sources to illustrate a point. These relationships will be discussed in more detail in the later discussion section of this dissertation.

3.7 Personal Reflection

I became interested in the topic of pet tourism because I own two dogs and consider myself a pet lover. Like the findings from literature and my participants, my dogs have become part of the family and I too have desires to travel with them. This sentiment, I have discovered, was also shared among my friends who are also pet owners. I arrived in New Zealand two years ago from China and have been in constant awe at how pet friendly this country is. The fact that I could bring my dog to a restaurant and even in some shops was such a contrast to where I came from. However, when I tried to look up pet friendly accommodations, I was amazed to see the scarce number that existed compared to other countries such as America and the UK. From there, I decided to embark on my research journey.

Throughout the in-depth interviews, I often struggled with baiting detailed insights from the participants. Both non-pet and pet friendly participants, in fact, had not contemplated or researched pet tourism in their area prior to the interviews. At times, when I attempted to extract detailed information, such as describing market competitors or considerations for pet policies, the responses were short and decisive. I tried hard to elaborate on the questions without being suggestive and achieved varying levels of success. For instance, some non-pet friendly participants became slightly irritated when continuously asked about pet tourism, thinking that I was perhaps trying to convince them of certain beliefs. Similarly, some pet friendly participants became apologetic after the interviews. They felt like they did not state enough practical challenges to accommodating pets, as they genuinely did not experience as many as some may predict. Fortunately, the collected responses were adequate to derive global themes that answered the research objectives.

The process of thematic analysis as outlined by Braun & Clarke (2006) is a dynamic and non-linear process. Knowledge obtained from existing literature and interview findings had constantly reshaped my insights and opinions of the subject matter. As the value of thematic analysis was capturing the latent meanings behind qualitative data, I often felt anxious between presenting the findings at face value or perhaps there was more to the story. Therefore, the direction of this study contained much uncertainty at times and I often revisited and reinterpreted the emerging themes. To logically work out these uncertainties, I came across a method of using post-it notes. Being able to visualise on a wall and move notes around, significantly sped up the clustering process and cleared my thought process. It also prevented me from becoming confused with the three-tiered themes of basic, organised and global.

Finally, I found qualitative research and thematic analysis to be a suitable approach for this study. I am glad to have discovered a framework that allowed deeper, latent meanings to be discovered and documented as findings. Despite the general absence of market research, my participants spoke from their feelings and experiences. In hindsight, it was good that they had an unwavering stance on their viewpoint, which helped me to draw my conclusions.

3.8 Summary

This exploratory research contained several research objectives to be answered through collecting information from in-depth interviews. The interview questions were designed in a way that the process began with straight-forward questions that led to more complex scenarios. Data were collected through a qualitative approach and the researcher's main effort was in relaxing the conversation to open deeper comments. Purposive sampling was adopted to identify potential participants that did not necessarily represent the breadth of quantity but gave the depth of information and garnered new insights.

Operators were contacted and screened for owner and managerial positions. In total 10 participants from nine accommodations qualified, and the researcher arranged a suitable time and place to conduct the interviews. The findings were analysed by adopting a thematic analysis approach. This approach required the researcher to thoroughly review each transcript, code the text and group them into basic themes, then cluster them into organised themes until finally, they became overarching global themes to conclude the study.

4.0 Findings

This section illustrates the findings from basic themes clustered into organised themes, then subsequently formed into global themes. The four global themes were market maturity, fear of losing customers, fear of operational difficulties and improving readiness. Each global theme is analysed in the following subsections. Quotes from the participants (see Table 1) are used to support these themes and while their fictional names do not represent their gender or age group, the table provided does offer information on what kind of accommodation they operate, whether they are pet friendly, and the source of finding this participant. It is worth noting that the first and second interviewees belonged to the same accommodation and offered their insights cohesively. They were also the only participants to operate both individual pet friendly and non-pet friendly accommodations. For convenience, a label “PF” (pet friendly) and “NPF” (non-pet friendly) has been attached to quotes.

4.1 Market Immaturity

The findings revealed that Auckland’s pet tourist market was a minority and often did not contribute significantly to increasing revenue. Participants’ knowledge of the market climate was also incomplete, which has led them to remain firm on their status quo. It was evident that both supply and demand sides of the market had opportunities to mature, which would change the way the participants currently perceived the market.

4.1.1 Perceived Market

Accommodation operators, on the topic of pet tourism, felt there was a need in the market for pet friendly accommodations. Pet owners want to travel with their pets due to their intimate bonds. Some pet owners even refuse to travel if their pet cannot come along, because sending them to kennels could be unaffordable or emotionally unbearable. Therefore, the desire to travel with pets is strong and resulted in a market for pet friendly accommodation. Participants have discovered that pet tourists would gladly pay a ‘pet-bond’ without reservation. A pet-bond was defined as a refundable deposit to cover for extra cleaning or damage due to pets. There were also pet tourists who offered a pet-bond

to non-pet friendly participants in hopes of gaining entry through exception. A participant has even experienced pet tourists attempting to bring pets in illegally.

“Well, because there is a need for it. And I found that if you say you cannot have pet, people sometimes would sneak one in.” - Wedge (PF/NPF)

When asked how many pet tourists enquire for a room per year, pet friendly accommodations usually catered for five to 36, while non-pet friendly accommodations received one to 24 enquiries. Participants believed this amount was insignificant compared to their non-pet tourists. These tourists were solely domestic, and none have catered for a foreign pet tourist before. This is likely due to the strict and extensive quarantine rules in New Zealand.

“99.9% are Kiwi. The time to quarantine takes too long and pretty much excludes the overseas market.” - Biggs (PF)

Participants have also revealed that the number of enquiries has remained stagnant over the years. This was perhaps related to the additional costs involved and some pets not being suitable for travelling. Therefore, pet tourists are likely to remain as the minority for the foreseeable future. Regardless, pet friendly participants still believed that the idea of not accommodating pets would mean they lost business in this market.

“It increases the marketing potential, it opens up the doorway for people who need to bring pets on holiday. And people are very grateful when they can bring dogs with them.” - Hera (PF)

There are accommodation operators who believed accepting pets could satisfy customer needs as well as increasing market share. One participant noted that major booking websites offering filters for pet friendly accommodations and refusing to accept pets would certainly mean closing off a distinct market. Pet tourists also feel happy and appreciative due to being welcomed with their pets. However, while pet friendly participants unanimously agreed that accepting pets had improved their occupancy, they had varying opinions on the increase in revenue.

“Because several times a year isn’t exactly an advantage” - Annie (PF)

“Obviously. Because it is maybe 10% to 15% of the business” - Wedge (PF/NPF)

Conversely, non-pet participants believed that the investment required to cater for pets would easily outweigh the revenue from accepting a few pets a year.

“I think only 2-5% of the market actually travel with their pets. It’s a huge facility investment for a small piece of the market... overall I think we will make a loss.” - Luke (NPF)

Non-pet participants did not believe the pet tourism market was growing and they were satisfied with their existing market.

“I don't think accommodating dogs would allow me to become more competitive in the market because we're already fully booked.” - Lando (NPF)

Risk was one of the key emerging considerations while interviewing the participants. They worried about various risks, including damage to property and content. Another important risk considered was negative reviews, as reputational damage had a prolonged impact on the business.

“So, our biggest worry is not actually revenue, but customers experiencing something like a flea bite will leave negative feedback and damage our reputation.” - Han (PF)

Participants expressed that the cause of issues such as flea bites were too hard to find. Therefore, in the absence of evidence, they could only reduce the risk, starting with removing pets. In summary, non-pet participants expressed that accommodating pets would involve too many considerations and the simple solution was to reject pets altogether.

It was intriguing that pet friendly participants did not seem to realise the existence of other pet friendly accommodations. When asked about it, their responses were generic, assuming there were probably a few around. Non-pet participants believed that no other accommodation operator would be interested in becoming pet friendly.

“I don't know whether there are any other pet friendly accommodations other than myself.” - Hera (PF)

“I can't even think of a motel in Auckland that's pet friendly.” - Talzin (NPF)

Overall, the pet tourist market in New Zealand is small and mainly domestic. Growth in this market has been stagnant and increase in revenue was debatable between pet-friendly participants. Non-pet participants rejected the idea of allowing pets either due to abundant existing customers or reluctance to accept pet-related risks. None of the participants had conducted market research in this area or knew about the others' existence.

4.2 Fear of Losing Customers

An overwhelming theme that transpired was the contrast between pet and non-pet friendly participants' trust towards pet tourists and how their pets may impact existing clientele. However, it was clear that all participants had placed their human guests at the upmost priority. The confidence of pet friendly participants originated from the absence of disastrous experiences, which has been implied by some others as fragile optimism.

4.2.1 Trust in Pet Tourists

Pet friendly participants believe that tourists' pets are mostly tamed, family-orientated animals. This means these pets are usually well behaved and will not cause any issues. In addition, pet tourists are grateful to be able to travel with pets and therefore will be mindful to keep their accommodation undamaged. This notion particularly resonated with participants from higher class accommodations, as they believed their pet tourists are of superior character and understood what appropriate behaviour was.

"The level of my guests knows they can't do that and will keep their dogs on the floor and put them in their (pet) bed... this is a nice home, and they have a nice room. If they have a pet, they treat their pet well and take care of it"
– Annie (PF)

Pet friendly participants also agreed that operators must trust their customers to a certain extent, no matter whether towards pet or non-pet tourists. The operator has an obligation to explain all the rules upon check-in, then leave everything to the customer. It is impossible to monitor them all the time, therefore the general approach was assuring mutual respect between both parties. Some operators related accommodating pets to children, ultimately the responsibility lies with the parents to act appropriately.

"When I meet and greet them, I just talk over all the policies. We have to trust them. If you treat people like adults, they act like adults. If you treat them like children, they act like children." – Wedge (PF/NPF)

Contrasting to their pet friendly counterparts, non-pet friendly participants often displayed their distrust for pet tourists throughout the interviews. The main reason behind this being they have a fixed stereotype of pets and that they will always be trouble.

"Dogs will be dogs, they will definitely disturb other guests." – Luke (NPF)

Some non-pet participants went further to state that they did not trust pet owners either. It was believed that tourists would behave under surveillance, then behave differently when left alone, especially when locked in their rooms. Ultimately, pets were considered as different to human beings, they will bark at other guests and create hygiene issues too. This was part of their nature that cannot be changed.

The lack of trust between non-pet friendly participants and pet tourists means that their perceived risks will always outweigh potential benefits. One participant inherited a pet friendly accommodation but would like to cancel this service. Allowing pets could attract negative reviews that are long lasting and impossible to erase. Complaints and negative reviews were not worth the effort of allowing pets. Other non-pet friendly participants believed that allowing pets will only create more workload that alone was not worth the minimal benefits. It was raised that maintenance wasn't only a budget issue, but a time issue too, as any damages could prevent the next guest from moving in if not dealt with in a timely manner.

“There’s no point to be reactive when incidents happen, because not only do you pay more for one-off pest control, you also get a bad feedback from the customer. These negative feedbacks cannot be erased on review websites.” – Han (PF)

“Not every mess we can afford to maintenance for a whole day.” – Leia (NPF)

Every participant's level of trust towards pet tourists has created alternating views on what type of accommodation would be suitable for pets. Even among pet friendly participants there were a few disparities. Some agreed that if the accommodation was upmarket, then it would not allow pets as the maintenance costs would be too expensive. However, conversely there were participants who believed only upmarket accommodations can attract the right pet tourists.

“I find that cheaper motels attract customers with pets who are more likely to be dirty. This hotel is more upmarket, so dogs are usually clean. Therefore, we avoid offering pet friendly services to cheaper accommodations.” – Han (PF)

One participant believed that any type of accommodation should not allow pets, unless there was a struggle for high occupancy. In summary, both pet and non-pet friendly participants acknowledged certain levels of pet-related risks, despite how much they trust pet tourists.

“There’s no advantage to being pet friendly unless you’re stuck in the countryside somewhere and don’t get many people. You will take anyone, because you don’t have enough turnover.” – Talzin (NPF)

Finally, regarding the topic of trust, participants expressed an erosion of trust whenever they faced a disastrous situation with pets. This presents a certain degree of fragility to the confidence that pet tourists and their pets will be well behaved. Most pet friendly participants had very few to no negative experiences with pet tourists. However, when asked about those negative experiences, they were quick to set rules to prevent it from happening again, such as no longer allowing big dogs because they had an incident of aggression. In extreme circumstances, two participants no longer wished to remain pet friendly.

“There aren’t many people who would accept dogs at their motels, not anymore. We used to many years ago, but it just created so many hassles and problems... Years ago, we’ve had a couple of really bad experiences with these German Shepard dogs, and the owners just tell you lies.” – Talzin (NPF)

“We once had a Japanese tourist that was worried about fleas in the rooms because he saw a comment on the website. He didn’t end up coming to stay with us... It’s hard to say whether the fleas came from pets, but it still deterred a customer after a year, so the best thing is to minimise the risk and phase out pets.” – Han (PF)

In summary, those who never had negative experiences with pet tourists will express high trust and optimism. Unfortunately, this trust could be eroded by negative experiences, as evident with participants who began to ban certain breeds or even stopped accommodating pets altogether.

4.2.2 Customer Experience

According to all participants, their customers’ feelings throughout their stay were of high importance. This included both pet tourists and other guests. When discussing how pets may influence customer experience, pet and non-pet participants had clearly separate views.

Non-pet friendly participants pointed out that not all guests would appreciate having pets around. Some may even become uncomfortable or scared around them. Even participants who owned and love dogs expressed that dog lovers be unable to handle rooms that

smelled like dogs. Therefore, a customer's check-in experience may have nothing to do with their preference with animals.

“99 times out of 100 the dog will leave a lingering smell in the room. I mean, I love animals, my parents bred animals for years. Both my sons have got dogs...But not in hospitality, because there's nothing worse than walking into a room and it smells of animal.” – Talzin (NPF)

Regardless of whether guests like pets around, non-pet participants believed there were other factors that negatively impacted customer experience, such as barking and biting. Barking during the night would impact other guests' sleep, while sometimes dogs can react negatively towards other people and cause incidents. These were the potential risks that non-pet participants strongly believed would negatively impact the customer experience.

According to pet friendly participants though, they had never received any customer complaints regarding pet disturbances. One participant reiterated that pet tourists have spent plenty of time together with their dogs, so it was unlikely that they will misbehave and disturb others. Pet friendly participants also mentioned that pet tourists in fact get along well with other guests.

“Usually they would comment about how pretty they are, but they hardly approach them.” – Han (PF)

The relationships with pet tourists and their pets are very close. Therefore, if an accommodation can grant their wish of staying with their pet and provide a reasonably safe environment, they would be satisfied. This had led to new and repeat customers due to word of mouth, which was beneficial to the business. This could be considered a positive by-product for providing a good customer experience.

Both pet and non-pet friendly participants agreed that they wanted to prevent charging guests extra, as this may cause them dissatisfaction and lead them to place a negative review. Maintaining high ratings on online booking websites was a priceless intangible asset compared to damage pets may cause.

“It's just not worth it. The money you could charge would be so small compared to the damage caused. Like you could charge a couple hundred dollars, but they would complain, and it's just not worth it.” – Hera (PF)

“Some dogs will chew things, like the furniture, and we don’t want to charge the guest too much. That’s why we want to control the incidental charges.” – Leia (NPF)

It was observed that participants were afraid of two aspects of online ratings and social media. First was the inability to remove comments, which meant once a negative feedback has been placed, it cannot be rectified. Second was the longevity of a comment’s lifetime, as comments from over a year ago would still carry some weight to potential customers. This finding acknowledges that maintaining positive customer experience and online ratings are a priority for accommodation operators.

4.3 Fear of Operational Difficulties

An interesting discovery throughout interviewing the participants was the amount of operational impact allowing pets has incurred for pet friendly participants versus what non-pet friendly participants anticipated. On this topic two key considerations emerged: hygiene control and operational investment.

4.3.1 Hygiene Control

Both pet and non-pet friendly participants considered hygiene control as an important standard to maintain. Pet friendly participants restricted pets from being on their furniture, including sofas and beds. This is simply because pets are likely to leave fur and stains behind. When asked whether extra labour costs were incurred due to accepting pets, pet friendly participants had put in different amounts of efforts, but it did not impact their budget. As pet tourists are relatively uncommon, the overall impact has been minimal for all accommodations. One participant was more diligent than others, due to fear of bugs.

“The housekeeper will have to do a deep cleaning, meaning all the pillow cases, duvet covers, sheets will all be replaced. Normally we only do that once a week.” - Han (PF)

Even then, this participant denied any additional labour costs. It was not necessary to hire additional staff to perform this task and both types of participants agreed that it was the effort that needed to be upscaled and this could strain the cleaners.

Hygiene issues include pet excretions, fur, bugs, odour and separation of human utensils. Pet friendly participants were quite satisfied with their pet tourists' behaviour on picking up after pets to date. Allergy risk was a key driver for the participants to focus on cleaning fur after the pets. Fur can be particularly odorous upon getting wet, making the task of cleaning more difficult yet important. Non-pet friendly participants believed that to accommodate pets, a regular pet control process must be put in place. Only then would they feel more confident. Contrary to pet friendly participants' statements, non-pet friendly participants believe investment in additional staff would be necessary.

"If you accept pets, we currently do a quarterly pest control for fleas, cockroaches etc, and having pets will increase these costs because we'll have to do it more frequently. We'll have to negotiate with the pest control company to be more focused on certain areas. Cleanliness will be our priority, for example how to get the smell off the carpet." – Leia (NPF)

"We'll need extra employees to clean the rooms. These are all extra costs that will impact the profit. Without pets we're already getting good business and profit." – Luke (NPF)

On the topic of allergies, pet and non-pet participants had a clear division of opinion, mainly around liability. Both types of participants agreed that allergy was an issue and that in New Zealand allergies are quite common, such as asthma. The impact on guests becoming allergic is a concern and non-pet friendly participants stated this was a major risk to their guests if tourists brought pets. However, pet friendly participants believe that it has never happened, and guests are responsible for informing them of any allergies.

"It is up to the tourists to let us know they are allergic to dog hair. People have to be responsible for their own selves. Generally, I do not know if someone is diabetic or someone is allergic to whatever. Otherwise it gets too hard. Most people take their own medicine if they are allergic to whatever anyway)" – Wedge (PF/NPF)

One participant also mentioned that most accommodation websites would have terms and conditions that guests should read prior to booking.

4.3.2 Operational Investment

From non-pet participants' perspectives, major renovation and new equipment will have to be in place to allow for pets. Most agreed on the necessity of having pet specific products in the room, such as a cage. In addition, their requirements included sound proofing, separation with other guests and providing exercise areas for pets. They

unanimously agreed that their current infrastructure would not meet their perceived requirements to accommodate pets.

“The whole building will need to be soundproofed to prevent sounds from going out. But to implement that will be very expensive...We will definitely keep them in a specific area, with cages and security. We’ll also separate pet tourists with other customers” – Luke (NPF)

Non-pet participants’ view on separating pet tourists was an effective strategy. Pet friendly participants have stated that doing so has prevented issues for them.

“They are too far away to trigger any allergies. I’ve never had any complaints not even barking.” – Hera (PF)

Not every accommodation had the luxury of large sections to separate guest rooms. However, there were other methods mentioned such as separation of activity areas. It was evident that pet friendly participants did not necessarily operate in a different infrastructure and environment to non-pet participants. However, they had experience in separating guest types to prevent issues raised by non-pet participants.

Pet friendly participants often did not invest in renovation but instead relied on what they had. The criteria for making an accommodation pet friendly was, in fact, straight forward – if the owner agreed to allow them, the house becomes pet friendly. Property owners who allowed dogs were usually dog lovers themselves. Any equipment or renovation that was deemed beneficial for accommodating pets would originate from the owners’ preparation for their own pets. Noticeably, some accommodations were intended to imitate a certain style, indirectly making themselves become suitable for pets.

“Those apartments have tiled floors, so there’s no carpet, no wooden floors to scratch and easy to clean. But they weren’t specifically set up for dogs. They are set up to be Spanish styled.” – Chewie (PF)

There was a contrast between what non-pet participants expected to require and what pet friendly participants implemented. Most pet friendly participants were pet owners themselves and they understood how to manage pets within the premise of their existing infrastructure. They also expected pet tourists to bring what they need for their pets.

In terms of investing in cleaning equipment and facilities, purchasing of expensive cleaning equipment was not necessary as pest control companies would perform any deep

cleaning that may be required. Neither do pet friendly participants separate their laundries to clean pet or non-pet room sheets.

“All the laundry goes down to Hamilton and it is cleaned and it is not separated. Everything is just the same.” – Wedge (PF/NPF)

Catering for pet tourists did not seem to incur any additional labour either. Tourists would have all sorts of questions, not necessarily pet related. Therefore, answering their questions was simply part of the service and did not incur any additional workload. This included the walkthrough of pet policies when pet tourists check in. There did not amount to an additional workload to enforce pet policies either. For instance, the pet policy may state that pets must stay with their owners, but most pet tourists always have their pets with them anyway, or only leave them for a short unnoticeable period. Worst case scenario, if pets were found to be in the room alone, staff will simply remind the pet tourist not to do so.

Pet tourists usually self-enforce the policies if there are fees involved. Therefore, pet friendly participants had not faced additional resource costs to enforce pet policies. Regarding maintenance, there was not enough evidence to suggest that floors or furniture needed more frequent replacement due to pets.

4.4 Improving Readiness

The analysis discovered that pet friendly accommodations were not well prepared for further expansion of pet tourism. Currently they are lacking in two distinct areas: policy development and future expectations. Policies are the necessary pet policies for the accommodation to inform its guests on acceptable behaviour. Future expectations relate to their attitude towards maintaining or expanding on their current business.

4.4.1 Policy Development

The evolution of pet policies was an organised theme that all pet friendly participants had experienced with their accommodation. Their responses revealed that popular pet policies, such as asking for a pet bond, were targeted at covering any unforeseen damages or cleaning costs, not to make additional profit. These policies should be familiar to all

tourists, as incurring extra fees would be expected if a tourist caused any damage. Therefore, a tourist's liability does not change whether they bring in pets or not.

“Even as an adult, if you break a glass, you are liable for the glass. You bring your pet and the pet knocks over a glass. Well, it's the same thing. it's protection of content... A lot of it is embedded in the policies for the guest's behaviour” – Biggs (PF/NPF)

Pet friendly participants acknowledged that certain breeds and age of dogs were not suitable for bringing into the accommodation. Puppies were declined due to their teething nature and lack of training. Large or aggressive breeds are usually restricted as well.

Pet policies usually state that pets were not allowed on furniture due to hygiene reasons. Some pet friendly participants restricted the areas pets could roam as well. The purpose was to prevent any disturbance towards other guests.

“They can only stay in their rooms, in the car, or in a cage. Some people leave a cage on the deck.” – Han (PF)

As mentioned in previous themes, specific rooms were allocated for pet tourists and while non-pet tourists could also stay in those rooms, the vice versa did not apply. This policy was mainly adopted to minimise potential risks with affecting other guests, also at times to control the number of pets staying at the accommodation.

“They can only stay at the beach front apartments and not every type of apartments.” – Chewie (PF)

Other policies included being responsible for looking after their pets, not leaving pets alone, picking up after pets, bringing their own pet gear and ensuring pets are well-behaved. Pet friendly participants have unanimously reflected that their past clients have performed this well. When asked to define well-behaved or well-trained, pet friendly participants' responses were very straight forward – that they do not make a mess in the house.

Despite commonalities in pet policies among pet friendly participants, throughout the interviews the researcher discovered that pet friendly participants did not take pet policies seriously. Some participants could not recite their key policies and did not realise this themselves. When asked how they convey the pet policy to pet tourists, the most common methods were verbally and through email.

“We email them when they mention they want to bring a dog. If they didn’t then we just verbally tell them. We should probably add it to our registration form.” – Chewie (PF)

It was intriguing that only one pet friendly participant had a printout copy of their pet policy. When others were asked why they have not considered printing and displaying their pet policies, they expressed that it would be a good idea. Therefore, it seems that pet friendly participants were not against the idea of printing pet policies, rather they simply had not considered it before. It was also likely due to a lack of template on what all the policies should be. For instance, one participant did not realise accommodations could charge an extra pet bond.

In summary, on the one hand there was evidence to suggest that pet policies in New Zealand are still immature and that pet friendly accommodations have not invested significant amount of effort in developing it. This had led most of them to only casually enforce their policies. On the other hand, some pet friendly participants had expressed that excessive pet policies would pressure the pet tourist. Pet tourists may feel paranoid and not enjoy their stay if they constantly worried over what their pet may do to the property.

“We are very relaxed about what the tourists can do. And I think they like that. I know there are other operators actually give them a whole set of instructions what can do and can’t do and this and that. But at the end of the day, we just let the owners do their own thing with their pets” – Wedge (PF)

Non-pet participants were insistent that they have never considered pet policies, nor did they understand or intend to understand it. Instead, they continue to reason why they refused to allow pets.

4.4.2 Future Expectations

The consensus among pet friendly participants was that the market demand for pet tourism exists, however it was small compared to non-pet tourists. Some pet friendly participants have stated that there was no harm in continuing to allow pets if their reputation remained undamaged.

“Offering pet friendly services is worthwhile as long as it does us no harm. It increases our market potential.” – Hera (PF)

The general impression from pet friendly participants of pet tourism was that it was not seen as a lucrative market. Neither did they see it as an opportunity to charge significantly more. Allowing pets was simply meeting a demand, one of many from a tourist. They believed accommodations rarely offered this service providing an opportunity for pet tourists to become repeat customers and help promote them.

“People do refer to their friends as not many hotels will allow pets... And that could be repeat guests and word of mouth to friends and family. It’s not something we market towards, but something we offer if they ask” – Chewie (PF)

Due to the perceived absence of a lucrative pet tourist market, pet friendly participants did not see the need to expand on this market, nor did they want to cater for too many dogs at once.

“To be honest if we don’t get any pet tourists we’re not worried at all.” – Han (PF)

“We actually don’t want too much development in this area because like you said if we have lots of dogs around they might start fighting.” – Chewie (PF)

Interestingly with pet friendly participants, while stating that allowing for pets did not incur any additional costs, solely relied on their existing infrastructure, which in turn could limit their capacity for pets. Subconsciously they understood that scaling up could destroy the good experiences they have had so far. Pet friendly participants expressed that they have never considered the future development of the pet tourism market but had some ideas on what newer accommodations might require.

“So, if you want to cater pet friendly, and make it really special and something for the tourists, you would have to make sure the fences are really good. You would have to make sure there are outdoor areas they can do their jobs on and they would pick it up. You would have to make sure there is a designated sleeping area, eating area and everything. I could see in the future that if they want to target pet friendly accommodation that you would provide more facilities.” – Wedge (PF/NPF)

Most non-pet friendly participants expressed that they would never consider allowing pets unless they had a new building specifically designed for pets. They also believed that pet friendly accommodations should exclusively take in pet tourists to eliminate any risks towards non-pet tourists.

“I think if you had accommodation that was only pet friendly, it could work. It would have to be advertised as only for pets and owners. Then everyone

going there would understand that there will be pets. And the accommodation would have to be set up for it, as in, in the rooms there may be a kennel or a place for the dog to sleep. The floors might not be carpet, but tiles instead. I think there could be a business for it, but you'll have to have the set up for it.” – Lando (NPF)

Only one non-pet friendly participant was adamant that the hospitality industry should not include pets altogether. This participant used to accommodate all types of dogs and had at times 28 rooms filled with dogs. This has proven to be a disastrous experience and could foreshadow the experiences of pet friendly participants if they scaled beyond their currently fewer dogs.

4.5 Summary

The four global themes of market immaturity, fear of losing customers, fear of operational difficulties and improving readiness were discussed in this chapter. Each global theme contained one or two organised themes formulated by interview findings, clustered into statements about a phenomenon. With the knowledge obtained from these global themes, this study can now answer the three original research objectives in the following discussions chapter. A literature comparison will also be conducted to highlight any similarities of differences to existing research.

5.0 Discussion

This research aimed to examine the pet tourism industry from an accommodation operator's perspective, located in Auckland. Adopting an exploratory research approach, this research performed a thematic analysis to discover the main considerations for accommodation operators when concerned with offering pet friendly services. Several key areas were explored using in-depth interviews, such as pet tourism trends, pet friendly accommodations, revenue potential, and operational implications. The following subsections attempt to answer the research questions through the obtained findings and compare results with existing literature.

5.1 Operators' Understanding and Perceptions of Pet Tourism

The first objective, to gain insights into Auckland accommodation operators' general understanding and perceptions of pet tourism, can be best answered by the global theme "market immaturity". According to the findings, Auckland accommodation operators considered the pet tourism market as present but considered it as largely insignificant. Both pet and non-pet friendly participants have experienced occasional enquiries (1-36 per year) from solely domestic pet tourists, but there has been no perceived growth to this trend. Therefore, the rising international trend of pet tourism as outlined by Lotjonen (2014) cannot be seen here in New Zealand.

Participants' responses agreed that pets have become important family members (Hodgson & Darling, 2011) and pet owners were motivated to travel with pets (Hung et al., 2013). Participants also agreed with William et al. (2004) that pet owners felt guilty about leaving their dogs behind or in a kennel. It was mentioned that travelling with pets provided greater enjoyment for the pet tourists and generated repeat customers, which aligned with Kirillova et al.'s (2015) statement on creating revisit intentions. Both Huang et al. (2016) and this study have found that pet tourists are more than willing to spend extra money, such as pet bonds, to travel and stay with their pets.

However, from the participants' viewpoint, not all kinds of pets would be suitable to travel, preventing owners from bringing their pets or being accepted into accommodations. Finding pet friendly accommodations and transportation continues to be a challenge for

pet tourists worldwide (Zhang, 2012) and have driven the majority to not bring their pets (TripAdvisor, 2013). One participant responded that some pet tourists have attempted to sneak in their pets, which is a behaviour also present overseas (Miller, 2014). This issue signified, in part, a general lack of information to pet tourists about pet friendly accommodations. Pet friendly participants also refused to actively market themselves as pet friendly, relying solely on word of mouth and repeat customers. Therefore, as a nation of pet loving people, wanting to travel with pets conflicted with practical issues of finding suitable accommodation.

Some pet friendly participants indicated that allowing pets could increase their market potential. They did not want to turn pet tourists away and close off that market, even though it was niche. However, non-pet friendly accommodations believed their existing market was already satisfactory and they lacked the motivation to expand into the pet friendly market. Therefore, while overseas accommodations have begun paying more attention to improving pet-related services (Nieminem, 2015), participants were not invested sufficiently to embrace additional pet tourist demand. There are two motivational factors for travellers according to Dotson et al. (2011): intrinsic push and extrinsic pull motivations. Pet friendly participants lacked innovation to their services and infrastructure, and thus cannot generate additional pull motivations for potential pet tourists. Similar, the lack of market growth has deterred non-pet friendly participants from transforming themselves into pet friendly, which contrasts with the phenomenon overseas (Lotjonen, 2014).

According to Boroshok (2006), accommodations can directly increase their occupancy rate and revenue by allowing pets. Pet friendly participants revealed that while occupancy rates have improved, additional revenue was debatable despite charging extra pet bonds and not discounting their rooms. The slow market growth combined with non-proactive attitude from operators could be the main drivers for this phenomenon. However, despite the lack of better revenue, pet friendly participants had a notion that they needed to service pet tourists or else this niche market will be lost. This discovery agreed with Kridler (2005), where pet friendly accommodations will continue to distinguish themselves from competitors by allowing pets.

It was intriguing that non-pet friendly participants believed that allowing pets would introduce a variety of risks, such as damage to their property and hygiene issues. Due to

this, they did not think anyone would be interested in doing pet friendly business. Pet friendly participants also have not conducted any market research and did not know of other pet friendly accommodations. They believed their guests were grateful due to a lack of pet friendly accommodations at reasonable prices. Prior literature presented a gap in validating whether this notion exists for operators overseas, as most existing research was conducted from the pet tourists' perspective.

In summary, there is a general lack of understanding about Auckland's pet tourism market. The development of pet tourism is at its early stages from both supply and demand aspects. Pet tourists' desire to travel with pets and challenges in finding pet friendly accommodations were in agreement with existing literature. The key difference was the absence of a growing market trend in Auckland, which had led to reluctance for participants to improve services and inability to achieve higher revenue, unlike their overseas counterparts. However, pet friendly participants believed in the pet tourism market and were committed to continue offering their services.

5.2 Factors when Deciding Whether to Accept Pet Tourists

The second objective, to explore the factors that operators consider when deciding whether to accept pet tourists, can be best answered by the global themes "fear of losing customers" and "fear of operational difficulties". Pet and non-pet friendly participants had contrasting opinions on how allowing or not allowing pets could impact their business.

Pet friendly participants treat pets as just another special request from tourists and did not wish to turn anyone down. Their "fear of losing customers" was more directed at losing potential customers. If there was a genuine desire to travel with pets, they would try to fulfil them. From their experiences, pet tourists enjoyed their stay and the word "happy" was a recurring code that emerged. Additionally, allowing for pets has not caused any perceived issues, such as non-pet tourist complaints, flea bites, barking and biting. According to Zhang (2012), serious incidents such as biting or allergies are also rare overseas. Their pet and non-pet tourists also appeared to get along well. Therefore, pet friendly participants were motivated to continue to allow pets without much worry.

However, non-pet friendly participants' "fear of losing customers" was related to losing existing customers due to allowing pets. Existing customers were defined as the non-pet demographic which has been the core market, even overseas (Racher, 2005). They believed pets would no doubt disturb other guests, mainly due to barking, allergies, odour and biting issues. Even if these issues did not exist, some customers simply would not feel comfortable with pets around. This belief was reinforced by existing literature from Morovati et al. (2008) where customers could be scared or uncomfortable around dogs. Non-pet friendly participants feared that negative customer experiences would lead to negative online reviews which then deterred their preferred demographics. According to Dixon et al. (2010), 48% of consumers who received a negative experience at an accommodation would share their negative experience with at least ten other people through word of mouth or e-word of mouth.

The other key consideration was the theme "fear of operational difficulties". The findings suggested that both pet and non-pet participants cared most about hygiene – dealing with fur, flea, odour and excrements. Non-pet participants primarily worried about allergy and flea bites which was an insightful discovery due to the limited research existing from the operator's perspective. According to Marshall (2005), cleaning costs usually increase per room as additional activities such as hair removal, carpet shampooing and allergen-free restorations are required when pet tourists depart.

Pet friendly participants considered hygiene issues as manageable and they have not yet experienced any issues to date. They believed it was the customer's responsibility to disclose any allergies prior to moving in. Most participants also stated that pet tourists respected the property and cleaned up after their pets to avoid potential fines. Most of the effort by the pet-friendly accommodation operators concerned performing additional cleaning duties, such as more frequent pest control and deep cleaning. These workloads were incorporated into their staff's daily routine and did not incur any additional labour costs. Some non-pet participants stated that additional hiring of cleaning staff would be required to sustain the extra workload. While additional recruitment of staff to conduct pet-related services may be necessary according to Zhang (2012), the labour was not for cleaning duties but for enforcing pet policies. This included monitoring, staff training and pet handling (Bunderson, 2010).

Pet friendly participants did not invest in renovation, instead relying on their existing infrastructure which may be already suitable for pets, such as separated rooms, tiled floors and existing fences. Meanwhile, non-pet friendly participants believed extra investment into renovation, facilities and labour was needed to accommodate pets. Perceived investment included sound-proofing walls, replacing carpet with tiles, separate fenced areas, extra cleaning facilities and pet equipment. Existing literature similarly suggested that the potential costs and risks to accommodate pets often troubled operators (Dotson et al., 2011) and that additional renovation such as soundproofing may be required to provide guests with a good night's sleep (Marshall, 2005). Additionally, pet-related facilities such as fences and cages may be needed to prevent serious issues such as biting incidents (McNally, 2008).

In summary, non-pet tourists outnumbered pet tourists significantly in both Auckland and the existing literature. Due to this, there has been a significant number of assumptions in the literature around extra investment and regulations needed to protect non-pet tourists, which has also been reflected by non-pet friendly participants. In pet friendly participants' experience though, they have not invested in protecting non-pet tourists nor encountered any major incidents to motivate them. It is possible that overseas accommodations invest more in risk mitigation due to the larger scale and lucrative nature of their pet-related operations. Whereas New Zealand's pet tourism is highly domestic and relatively small in nature, participants had the luxury to adopt personal preferences, rather than be concerned with market awareness.

5.3 Insights to Further Develop Pet Friendly Accommodations

The final objective, to provide insights for the Auckland region to further develop pet friendly accommodations, can be best answered by the global theme "improving readiness". Improving readiness can be dissected into several aspects relating to enhancing the current state of accommodation operator's preparation for the pet tourism market. Managing policy development and future expectations are potential paths to market development that ensure steady uptake of pet friendly accommodations without exposure to harm.

The first enhancement to improving readiness is maturing pet policies. Pet policies were found to be underdeveloped and underappreciated from all participants. They shared many similar rules to their literature counterparts: picking up after pets, restricted activity areas (Alisau, 2004), limited room selection and extra pet bond (Chipkin, 2006). However, pet friendly participants heavily relied on verbal communication to convey the rules and often were not able to recite all of them. At times, as the interview progressed, they began to realise other policies that were forgotten earlier. Only one pet friendly participant had a printed version of their pet policies, while others simply did not consider it. This is a stark contrast to overseas accommodations in mature markets, such as America and North-western Europe, where pet tourists are required to sign a copy of the pet policy upon checking in (Chipkin, 2006).

Some participants believed that too many pet policies may end up discouraging pet tourists to stay, as they would be constantly anxious about their pet's behaviour. Similarly, Bunderson (2010) found that pet policies can prevent many pet owners from travelling with their pets. Additionally, some pet-friendly participants were also unsure whether a policy would be appropriate. For instance, one participant did not realise that they could charge a pet bond from pet tourists. Non-pet participants' attitudes towards pet policies were similar to non-pet tourists described in the literature. They did not trust that policies would be followed behind closed doors, and thus refused to stay at pet friendly accommodations (Belcher, 2011).

The second enhancement to improving readiness is better communication and market awareness. There are shortages of supply and demand for pet friendly accommodations in Auckland, however even within this niche market no one appeared to have conducted any competitor research nor target advertisement. Non-pet friendly participants did not believe accommodations wanting to allow pets existed and pet friendly participants did not know of other pet friendly accommodations. Pet friendly participants acted in isolation, meaning there was no driving force to further promote their experiences and operating model. Most pet friendly participants did not perform any marketing to attract pet tourists, some only mentioned it on their website. Sustainability in their pet tourist numbers originated mainly from word of mouth and repeat customers. Absence of marketing has impacted demand growth, as one participant shared that non-pet tourists asked about bringing their pets next time only after seeing some pets around. Therefore,

it was evident that better communication and marketing skills were necessary to drive this industry forward.

The third enhancement to improving readiness is establishing mutual trust with pet tourists. Non-pet participants worried about liability for inflicting allergies or biting incidents, however pet friendly participants dissipated this fear through trusting their pet tourists. There were several reasons why pet tourists could be trusted. First, pet friendly participants believed that treating customers like adults would make them behave like adults. This notion applied beyond allowing pets, but also in general cases, such as how participants would treat their rooms and water usage. Second, they believed that people are responsible for themselves. Therefore, if someone has an allergy, dietary or other health concerns, this should be raised to the operator prior to checking in. Third, pets were considered similar to children: it was up to the parents or owners to ensure no trouble is caused. Finally, in the presence of a pet bond, pet tourists tend to be more cautious of their pet's behaviour as they do not wish to incur any financial loss. Therefore, with clearly defined responsibilities, non-pet participants should be able to alleviate their anxieties around accommodating pets.

The final enhancement to improving readiness is understanding scalability. Without significant investment in infrastructure, all accommodations need to evaluate their appetite for handling pets. Pet friendly participants were satisfied with their current operations not only due to well behaved customers, but they also consciously monitored the quantity and breed of pets. Some pet friendly participants indicated that they did not wish to actively attract more pet tourists, even if they had the capacity. This research discovered that trust and confidence were fragile beliefs as the number of pets increased. One non-pet friendly participant used to accommodate many more pets than any other participant and ended up with a negative experience. That participant has since turned non-pet friendly and insisted that pets should not be part of the hospitality industry. In summary, risks appear to scale with quantity meaning better preparations need to be evaluated.

The key to future development in the pet friendly accommodation industry is allowing more operators to confidently allow pets without harm. There was a recurring code of "no harm", where all participants agreed they would only accommodate pets under this circumstance. Non-pet tourists remained most of their customers and maintaining their

reputation with this market was paramount to the participants. Therefore, “no harm” was defined as no negative impact to existing customers and the participant’s reputation. Three methods were suggested to achieve this.

First, operators could intentionally set up their accommodation to target pet tourists, making clear to all customers that this was a pet tourist accommodation. Prominently marketing the accommodation in this way allows pet and non-pet tourists to expect the presence of pets and its implications. Therefore, expectations can be managed to prevent complaints. Second, it was stated that the financial capability of pet tourists positively correlated with how well-trained their pets were and their own behaviour expectations. Price points and pet bonds can be adjusted to achieve the desired effect. Finally, ensuring the choices of furniture and furnishings are based on ease of maintenance, even replacement, which would minimise the pain when accidentally damaged. Minimising potential damage to fit within pet bonds was considered “no harm” by participants.

In summary, Auckland participants had similar pet policies to the literature findings, however do not present them in a formal manner. Four enhancements for the current state to improve readiness and three recommendations for sustainable future growth have been provided. These were based on the global theme “improving readiness” from the findings and establishes some future directions for Auckland.

5.4 Summary

The three research objectives have been answered in this chapter and compared to existing literature. There were many similarities between pet friendly participants and the literature in terms of identifying market demographics, management experience and pet policies. However, participants have adopted a more relaxed approach regarding business decisions for the future. For instance, much risk aversion investment and formalisation of policies have been neglected for personal preferences. This behaviour was mainly driven by the lack of market growth, lucrative income and scale of operations. The domestic nature of New Zealand’s pet tourism market could also be factored in the complacency towards a stale demographic. The following chapter will offer implications from this research, along with limitations and future research opportunities.

6.0 Conclusions

Following the discussions which answered the research objectives, several conclusions can be drawn in this chapter. The following sub-sections will revisit the aims and objectives, and present the theoretical and practical implications, limitations, future research and concluding remarks.

6.1 Aims and Objectives Revisited

The purpose of this study was to discover and explore the main considerations for hospitality operators in Auckland when concerned with offering pet friendly services for tourists. Insights into the operators' experiences and perspectives were achieved through adopting explorative in-depth interviews and thematic analysis. Several key findings from the global themes were discovered:

1. New Zealand's pet tourism market is considered small and mainly domestic, with stagnant growth. An increase in revenue through accommodating pets was debatable.
2. Non-pet participants rejected the idea of allowing pets due to abundance of non-pet customers and reluctance to accept pet-related risks.
3. All participants operated in silos without conducting any prior research on the market or each other's existence.
4. Pet friendly participants hardly experienced any incidents and expressed high trust and optimism for pet tourists. However, this trust was fragile if a serious incident occurred.
5. All participants feared negative online reviews due to not being able to remove or amend them and the longevity of a comment's lifetime.
6. Non-pet friendly participants feared hygiene and allergy issues. Pet friendly participants expressed that the risks were minimal and that other customers were responsible for stating their allergies.
7. Non-pet friendly participants believed that significant investment into renovation would be required to accommodate pets. However, pet friendly participants have spent an insignificant amount and relied on what they already had. They also

stated that there were not any additional workload or labour costs involved to accommodate pets.

8. Pet friendly participants were relaxed about pet policies and did not formalise them. Most were conveyed through word of mouth instead of a written policy agreement.
9. Pet friendly participants did not see this market as lucrative, therefore only providing pet accommodation as a service. These operators were not motivated to expand or cater for more pets.

These insights were able to sufficiently answer the research objectives and provide a unique view from the operator's perspective to address some of the literature gaps.

6.2 Theoretical Implications

This study took on new perspectives to pet tourism in the accommodation industry. A wide range of existing literature regarding pet tourists' perspective of travelling with pets has already been conducted. However, research from the accommodation operator's perspective has been severely limited overseas and to this researcher's knowledge is non-existent in New Zealand. By investigating operators' experiences, emotions and perspectives on pet tourists, this research provides important theoretical contributions to further understand the topic of pet tourism between all parties. The explorative nature of this research provided new themes that can now be tested on a larger scale through surveys, observations or computer-assisted interviews. This research also adopted thematic analysis to code data and derive themes which could become a useful template to further studies in this area, applicable across different locations and cultures.

6.3 Practical Implications

This study provides some practical recommendations for New Zealand and its hospitality and tourism industries wishing to further develop the domestic pet tourism industry.

6.3.1 Raising Awareness of Travelling with Pets

This study found that the pet tourism market in Auckland was niche and showed no signs of growth. One potential reason why there are not more pet tourists in Auckland is perhaps the lack of information on pet friendly accommodations. Existing pet friendly accommodations in Auckland were not investing in marketing for their pet friendly services, as the consensus was that it was an additional service not a core profitable business model. The absence of pro-active advertisement means potential pet tourists are not being attracted to the idea of travelling with pets. Many feel hopeless when they are seeking the opportunity to travel with their pets and cannot find enough options for pet-friendly accommodations.

Pet and tourism related associations or organisations such as ATEED for Auckland could run campaigns to actively promote the proven benefits of travelling with pets – such as increasing the human-animal bond and enhancing the tourism experience. A dedicated website for assisting pet tourists to plan their next journey would be helpful in proving the possibility of pet tourism in New Zealand. These organisations also play an important role in raising awareness to accommodation operators, encouraging them to consider becoming pet friendly once the market begins to show signs of growth.

6.3.2 Providing Industry Guidance for Accommodation Operators

Non-pet friendly accommodation operators are fixated on their beliefs that allowing pets would inherently introduce severe risks to their business. Guidance can be provided to existing and new accommodation operators to educate them on how to minimise the risks of allowing pets on their premises. There are three possible ways to achieve this: education on pet policies, standardising procedures and understanding pet tourist expectations.

First, a standard set of pet policies should be established and distributed to all accommodation operators to formalise and present to customers. Accommodation operators have the freedom to add to the list of policies based on their unique situation. A properly displayed pet policy would provide pet and non-pet tourists with an idea of what to expect at this accommodation. All tourists would be required to sign a terms and conditions agreement that clearly states their responsibilities. For instance, allergies need

to be raised prior to moving in and pet owners are accountable for any damages or incidents caused by their pets.

Second, standard operating procedures should be shared amongst all accommodations. This includes standards and equipment for cleaning and frequency of pest control as a reference. An industry audit could also be introduced to identify rooms that have the potential to be pet friendly, such as those separate from others or those which have tiled floors. A set of recommendations could then be the output of the audit on what to invest and with procedures for maintenance.

Finally, understanding pet tourists' expectations would be helpful in establishing mutual respect and better communications. Safety is the biggest concern to pet tourists and therefore they constantly worry about pets wondering outside and getting lost or hurt. Adequate fencing and design of activity zones would help alleviate the anxiety of pet tourists and gain their trust. Positive experiences for pet tourists have proven to bring repeat business through brand loyalty. As accommodation is an experience product that could not be judged prior to consumption, word of mouth (WOM) plays a significant role in this industry (Mack et al., 2008). User generated content (UGC) such as online reviews is considered a modern form of WOM due to market growth in hospitality and tourism websites (Litvin et al., 2007). Some literature even suggested that UGC has now overtaken WOM in terms of market influence, due to high adoption rate of technology (Hills & Cairncross, 2011).

Eliminating the fear of unknowns would provide a much easier transition into the pet tourism market. Establishing a clear pet policy, standardising procedures and developing mutual trust can ensure everyone is satisfied. Existing pet friendly accommodations could also benefit from these guidelines, to further scale up pet numbers they will need to start conforming to best practises instead of adopting a relaxed approach.

6.3.3 Improving Online Rating Display

More than 80% of tourists digest UGC prior to deciding on where to stay (Prabu, 2014). Sparks and Browning (2011) have discovered that tourists were more willing to book an accommodation that tended to have more positive reviews. Therefore, UGC directly

impacts both accommodation sales and business performance (Xie et al., 2014). Positive images built by previous customers are much more influential than the accommodation's own marketing (Gretzel, 2006). Tourists tend to be sensitive towards negative or mixed reviews, much more than positive reviews. This behaviour was explained by Gavilan et al. (2018), where customers only believed positive reviews when there were plenty but were quick to trust negative reviews regardless of frequency.

A key concern for all participants was generating negative online reviews due to pets. Accommodating pets introduces a variety of risks such as barking, smell and fleas that could impact other guests. Reputation damage can linger for an extensive period and deter potential customers. Additionally, New Zealand's pet tourism market is solely domestic and could be perceived as lower value than international customers. Therefore, any negative feedback due to accommodating pets could be detrimental to business from overseas. However, rare incidents should not deter operators or customers from seeing the harmlessness of having pets and changing the way UGC are displayed could be a solution. It would be advisable for online ratings to include experiences with pets at the accommodation by both pet and non-pet tourists. A better social media policy where pet related ratings are independent of regular feedback will assist operators and customers alike to clearly weigh the positive versus negative, without needing to sort through all the comments.

6.3.4 Establishing Pet Friendly Accommodation Associations

Due to a lack of market research, participants did not attempt to discover the current climate for Auckland's pet friendly accommodations. Pet friendly participants admitted to not knowing the existence of other like-minded operators, while non-pet friendly participants were surprised that anyone would want to accommodate pets. To change the current state of accommodations operating in silos, associations should be established to facilitate knowledge sharing and networking. Every pet friendly participant in this study provided unique and valuable insights on how they run their business and there needs to be a channel to disperse this knowledge. For instance, one pet friendly participant did not know that they can charge a pet bond, while another thought printing out their pet policy would be a great idea.

Associations create opportunities to collectively solve pet-related issues and even support newer operators to accommodate pets. This study has shown that optimism can easily be lost if negative experiences occur, thus creating a networking avenue to learn and regain confidence would be beneficial for the industry.

6.4 Limitations and Future Research

There were several research limitations to contemplate throughout this study. A key limitation was the operational scale of research participants. Due to the early stages of pet tourism development in Auckland, the demand for pet friendly accommodations has not stimulated operators to service beyond one or two pets a month. Therefore, their opinions mostly relied on small-scale operating experiences and may not represent the global market entirely. It is recommended that future studies can target accommodation operators at destinations with a well-developed pet tourism industry, or where there is a larger pet tourist demand, to gain a more comprehensive viewpoint.

Another limitation of this research was the sample size. This research adopted an explorative research design with purposive sampling to obtain pet friendly accommodations in Auckland, which resulted in scarce numbers. Filtering the internet search results to exclude private properties and venues that were primarily for functions and events, there were only 15 pet friendly accommodations remaining with an adequate scale to become suitable participants. If pet tourism further develops in Auckland and more pet friendly accommodations emerge, it could be worthwhile to conduct a similar research again or a larger quantitative study using data collection methods such as surveys.

Additionally, although accommodation plays a major factor in pet tourism, a pet tourists' travel plans also factors in other experiences that are pet friendly. This includes restaurants, scenic locations and activities that allow them to maximise their enjoyment with their pet companions. Future research on pet tourism trends may need to factor in these diverse factors and the perspectives of all parties involved to shape a comprehensive understanding of the customer journey.

Finally, the findings of this research are limited by New Zealand's landscape, tourism and environmental regulations, culture and building policies. It would be valuable to perform

a cross-culture examination between the findings from Auckland with other cities around the world. Countries with cultural similarities, such as Australia, and countries with differences, such as China, would likely yield new insights. This recommendation also minimises any cultural bias to the implications of this study.

6.5 Concluding Remarks

Pet tourism is a segment in the tourism industry that has sparked many controversial viewpoints and valuable insights. This study performed a qualitative explorative research involving primary data collection through in-depth interviews and adopting a thematic analysis approach. The research objectives and its participants were unique in both filling a gap in the literature by taking a different role perspective and providing an original context for New Zealand. Pet tourism has become a global trend and, although it has not yet significantly impacted New Zealand, it was valuable to engage the market players to understand the current state. The participants provided a clear context of their experiences and good reasons as to why they will continue to operate in their status quo.

New Zealand's domestic tourism market is growing and with more travellers means more people likely to desire bringing their pets. Therefore, the researcher ultimately believes there is potential to grow the domestic pet tourism market. New Zealand's stagnant market can be described as a stalemate, where accommodation operators work in silos without motivation to drive the pet tourism market and pet owners wanting to travel with their pets, but both supply and information are scarce. Resolving this complex issue cannot be the effort of individuals, but from unified pet friendly associations and even certain levels of government intervention. Pet owners should look forward to the day where travelling with pets becomes much more accessible and abundant.

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Appendices

Appendix A: Interview Guide

Interview Questions (pet friendly accommodation)

1. How often do you accommodate pet tourists with dogs?
(When was the last time? Why do you allow dogs to stay at your accommodation? Were they willing to pay extra?)
2. What are your pet policies for guests?
(Elaborate on why these policies were put in place)
3. Can you tell me the challenges you face when serving pet tourists?
(Operations, labour, budget, enforcement of policies)
4. How receptive/satisfied are your other customers to having dogs around?
(Experience from both pet tourists and non-pet tourists)
5. Do you feel that allowing for pet tourists has provided a competitive advantage for your accommodation?
(Revenue, exposure/marketing/brand, customer satisfaction)
6. Do you think the pet friendly accommodation market is becoming competitive?
(Why are there not more pet friendly accommodation providers, how sustainable is your advantage)
7. What additional resources have you invested to provide your pet-friendly services?
(Renovations, staff training, outdoor fencing)
8. Overall do you think offering pet-friendly services is worthwhile?
(Will you continue to support this business model?)

Interview Questions (non pet-friendly accommodation)

1. Have you ever received any enquiries from pet tourists who wishes to bring their pets?
(When? How many? Were they willing to pay extra to bring pets?)
2. Have you considered implementing pet policies to allow dogs?
(Elaborate why/why not)
3. What obstacles are there to allow for pet tourists?
(Operations, labour, budget, enforcement of policies)
4. How do you think allowing dogs will impact the customer experience of your existing customers?
5. Do you think that accommodating pet tourists will allow you to become more competitive in the market?
(Why/why not)
6. Do you think the market trend is leading towards pet-friendly accommodations?
7. If you eventually decided to offer pet-friendly services, what additional resources would you require?
(Renovations, staff training, outdoor fencing)
8. Overall do you think offering pet-friendly services will be worthwhile?
(Will you consider this business model?)

Appendix B: Participant Information Sheet



Participant Information Sheet

Date Information Sheet Produced:
10 November 2017

Project Title
Accommodating Travellers with Pets: Is Auckland Ready?

An Invitation
I am a Master's student from AUT University in Auckland currently conducting research for my dissertation. Pets are becoming an integral part of many families worldwide and pet owners have strong desires to travel with their pets. However, accommodations are posing a major obstacle. This research will take on the perspective of accommodation operators in Auckland, aiming to discover key considerations with offering pet-friendly services. The results of this research could contribute to further development for accommodations in Auckland into the growing market of pet tourism.

As an accommodation operator, you are key to this research and you may benefit from its findings. I would much appreciate your participation in an interview with me. Please be advised that this is entirely voluntary and if you choose to participate, you may withdraw at any time without any consequences.

What is the purpose of this research?
This research aims to discover the main considerations for accommodation operators in Auckland, when concerned with offering pet friendly services. This interview is intended to explore the operator's point of view from both pet-friendly and non-pet friendly participants. The findings will provide insights for further exploration into how to transform Auckland's accommodations to be more pet-friendly.

This research is a requirement to fulfil my programme of study – Master of International Tourism Management. This research will be published as a dissertation in both printed and electronic formats, and potentially be presented at academic journals and conferences.

How was I identified and why am I being invited to participate in this research?
I catalogued Auckland's pet-friendly accommodations through various booking websites. I also listed nearby non pet-friendly accommodations that were comparable in price using the same approach. Potential participants were approached via email, collected from their accommodation websites. This research aims to target respondents who have a deep understanding of their operations and can represent the business in answering pet tourism related questions.

We are looking for accommodation operations managers who oversee the operations of a lodging establishment and keeping the accommodation running smoothly. Operations may include human resources, housekeeping, security, public relations, food service, sales and finances. Or any other staff performing a similar role as above.

If you are qualified, you can be a valuable contributor to this research by participating in this study. Your views are very important to the knowledge gap that this research is attempting to address.

How do I agree to participate in this research?
Upon initial email contact, if you are qualified and willing to participate, you can respond to the email invitation or by phone. I will arrange a date, time and meeting place at your convenience to conduct the interview. You will be presented with a physical consent form to sign before the beginning of the audio-recorded interview.

Your participation in this research is voluntary. You are able to withdraw from the study at any time. If you choose to withdraw from the study, then you will be offered the choice between having any data that is identifiable as belonging to you removed. However, once the findings have been analysed, removal of your data may not be possible.

What will happen in this research?
This research will conduct in-depth interviews to gather your viewpoint by allowing open-ended comments and producing details relating to pet tourism. The interview might last 45-60 minutes. The entire interview will be voice-recorded and transcribed for analysis.

What are the discomforts and risks?

You will not experience any kind of risk in this research. There will be no physical or emotional harm to you since the interviews will take place at a safe environment and you have the right to agree or disagree to participate in the study. If you feel discomfort from being audio recorded or experience any other issues, you can stop the interview whenever you want.

How will these discomforts and risks be alleviated?

You may not want to answer all the questions in this interview. If there are questions which are unclear to you, you may ask me to repeat and elaborate further. Moreover, we can terminate the interview at any time without any consequences to you. I will also keep the time limit within 60 minutes. This study is regulated by my University's Ethics Committee. I will ensure that your information will be kept strictly confidential.

What are the benefits?

The value of this research is the insights into operational issues with accepting pets and how to overcome them, which has practical implications for accommodation operators. A current state assessment of Auckland's position in the pet tourism industry will also be useful for mid to long-term development into this growing market. Your perspective is crucial to this aspect of the tourism industry.

How will my privacy be protected?

Your answers and contact details will be separated and kept anonymous. No person will be identified in the presentation of findings even in citing quotations from the transcribed answers. If you wish to know the results of this study, I may ask for your e-mail address but kindly take note that this will only be used to provide you a summary of findings. The recorded transcript will be kept in a protected file and will not be shared with anyone.

What are the costs of participating in this research?

This research would take about 45-60 minutes of your time.

What opportunity do I have to consider this invitation?

You will be given 2 weeks to consider the invitation. If you have not replied by then, a phone call will be made to discover if you have received the initial email, and to see whether you are still interested.

Will I receive feedback on the results of this research?

You will be offered a chance to receive a summary report of the research findings. You will have the option of expressing your interest in receiving this summary report in the consent form where you can also indicate an email address for this purpose. The report will be emailed to you at the conclusion of the study.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this research should be notified in the first instance to the Research Supervisor, Dr Heike Schänzel: e-mail heike.schanzel@aut.ac.nz, phone +64 9 9219999 ext 6923

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTC, Kate O'Connor, ethics@aut.ac.nz, 921 9999 ext 6038.

Whom do I contact for further information about this research?

Please keep this Information Sheet and a copy of the Consent Form for your future reference. You are also able to contact the research team as follows:

Researcher Contact Details:

Yiqi Chen: E-mail yikkichen@gmail.com, Phone +64 27 4755 407

Project Supervisor Contact Details:

Dr. Heike Schänzel: E-mail heike.schanzel@aut.ac.nz, Phone +64 9 9219999 ext 6923.

Approved by the Auckland University of Technology Ethics Committee on 01/12/2017, AUTC Reference number 17/427.

Appendix C: Consent Form



AUT

TE WĀNANGA ARONUI
O TĀMAKI MAKAU RAU

Consent Form

Project title: **Accommodating Travellers with Pets: Is Auckland Ready?**

Project Supervisor: **Dr. Heike Schänzel**

Researcher: **Yiqi Chen**

- ☐ I have read and understood the information provided about this research project in the Information Sheet dated 10 November 2017.
- ☐ I have had an opportunity to ask questions and to have them answered.
- ☐ I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- ☐ I understand that taking part in this study is voluntary (my choice) and that I may withdraw from the study at any time without being disadvantaged in any way.
- ☐ I understand that if I withdraw from the study then I will be offered the choice between having any data that is identifiable as belonging to me removed or allowing it to continue to be used. However, once the findings have been produced, removal of my data may not be possible.
- ☐ I agree to take part in this research.
- ☐ I wish to receive a summary of the research findings (please tick one): Yes ☐ No ☐

Participant's signature:

Participant's name:

Participant's Contact Details (if appropriate):

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.....

Date:

Approved by the Auckland University of Technology Ethics Committee on 01/12/2017 AUTEK Reference number 17/427

Note: The Participant should retain a copy of this form.

Appendix D: Basic Themes

[illegible]

Appendix E: Organised Themes

