

# Determinants of industry identity: an empirical examination of entertainment tourism

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## Abstract

Contemporary casinos operate in the form of integrated resorts with a mix of gambling and non-gaming elements, contributing to the development of entertainment tourism. With the diversification in customer portfolio and society preference with better image association, this new form of tourism begins to draw attention in casino destinations. However, little is known if suppliers are devoted to the new identity, hence this paper sought to address industry identity of entertainment tourism through a qualitative study of Macau- renowned gaming capital in the world. Management of 15 entertainment tourism suppliers were invited for in-depth interview. The findings suggest that perception of industry boundaries from suppliers is crucial for sustainable growth, and industry identity of entertainment tourism is affected by government policy, marketing, culture, resources, financial concern and future orientation. This paper contributed to existing identity theory literature with the discussion of essential determinants for gaming and entertainment tourism, offering theoretical and managerial implication for destination developers and policy makers who aim at sustainable growth and industry development through building strong industry identity.

**Keywords:** casino, entertainment tourism, sustainability, identity, Macau

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## 1. Introduction

Studies on entertainment and tourism has been conducted by industry and academics (Adeboye, 2012; Pearce, 2008a). In early stages, entertainment referred to activities to be “consumed without great mental or physical effort” (McKercher, 1993, p. 13). Then, the concept of active and passive participation were advocated, with respect to participants’ choice towards the types of activities selected, ranging from attending football games, bars, theme park, casinos to extreme sports (Littrell, Paige, & Song, 2004). As a result of technological innovation, global entertainment and media industries has surged (Vogel, 2020), with much attention on virtual reality related entertainment activities which are expected to grow by 40.5 % from 2017 to 2022 (Statista, 2019). In the context of tourism, entertainment may refer to activities such as going to theatre, events, theme park and performing arts

(Besciu, 2013; Hughes, 2013), hence tourists travelling to a destination in pursuit of these activities can be considered as entertainment tourists, and entertainment tourism may be defined as the economic activity derived from entertainment tourists in the pursuit of entertainment elements throughout their travel experience. As visitors may focus their trip on the exploration of entertainment activities (Wong & Rosenbaum, 2012), tourist expenditure diverges in categories. In fact, in addition to traditional motivation of travel, contemporary tourists may travel for specific entertainment-thirst such as attending a concert of their favorite celebrity, a fashion show or even a game, catalyzed by improved transportation, reduced travelling cost, changes in values, etc. We are currently facing the “entertainment age” which marks the rapid development of entertainment business that generates trillion-dollar revenue each year (Vogel, 2020). Although the significance is emphasized, there is still a scant of literature with regards to the study of this industry (Luo, Lam, & Fan, 2020), and delimitation diverges. The fact of under-investigation leads to the need to correlate in many aspects. For example, scholar suggested that entertainment tourism cities’ performance correlates with global financial market (Chan, 2011), resulting in indirect and sometimes vague interpretation. Therefore, the question of ‘what is entertainment tourism?’ and related issues such as boundaries, supplier attitude and recognition often ring the bell. In view of the formidable performance benefits as illustrated in the identity theory (Dhalla & Oliver, 2013), and the crux of building competitive edge and customer loyalty in today’s highly competitive environment (Sánchez-Sánchez, De-Pablos-Herederó, & Montes-Botella, 2020), investigation of boundary and identity drivers is essential. Since vast body of identity literature focus on individual and national level (Xue, Kerstetter, & Hunt, 2017), our study tries to reveal suppliers’ perspective, as investigation at a specific level offer a vivid picture of each type of stakeholders and contribute to the sustainable tourism development (Byrd, 2007). In addition, current identity study often jointly analyses tourism as an integrated concept and misses the nuances involved in new types of tourism industries which receive uneven attention in the dynamic environment (Tomić, Leković, & Tadić, 2019), thus our study focuses on entertainment tourism specifically by conceptualizes characteristics and drivers for industry identity through findings of a qualitative Macau-based exploratory study. From the “Monte Carlo of the Orient” to world gambling capital, Macau has been recognized as a gaming destination (Li, Kim, & Wong, 2017). Throughout the years, over reliance on casino industry and the need to diversify and rebrand Macau with non-gaming elements has been emphasized (Liu, Dong, Chang & Tan, 2020). Even the local government launched image related marketing campaign to rebuild the city as international leisure center, still many would consider casino and gambling being the major representation of the city (Chen & Song, 2019). As the recognition as a gaming city is rigid, Macau confers felicitous context in the exploration of industry identity, and this paper set out to reveal the characteristics and determinants from the suppliers’ perceptive.

## **2. Literature Review**

### ***2.1 Entertainment and Tourism***

Discussions of attractiveness of entertainment in travel experience could be found as early as the 60s (Perkins & Taylor, 1965). At that time, with the emergence of rural tourism and various kind of tourism activities, destination with modern entertainment and leisure services still reap most of the tourists (Poggioli, 1965). With its strength in creating economic value, scholar tried to explore tourist-oriented entertainment activities (Goldberg, 1983) when boundary between tourism and entertainment was more vivid. As the development of entertainment tourism is economic owing to the fact that entertainment activities diverge in categories and sizes, destination often modify existing resources in attracting specific tourist markets. From time to time, benefit of entertainment tourism towards local and tourists is advocated. While well-selected entertainment activates could benefit local residents by offering vibe and provoking positive actions (Wan, Li, & Kong, 2011), it as well demonstrates substantial attractiveness to tourists (Hennig-Thurau & Houston, 2019) and representing an influential sector of high relevance in promoting destination. In tourism context, Pearce (2008b)’s work identified boundaries and

connections of tourism and entertainment. His later work explored views of various stakeholders pertaining to future development (Loi & Pearce, 2012). In addition, a number of literature has associated motivations and preferences with the variety of entertainment services facilitating tourism development (Hughes & Benn, 1995; Petrick, Morais, & Norman, 2001; Rosenbaum & Wong, 2015). These work offer insights into the inseparable inter-relation of entertainment and tourism and the value in identifying components in entertainment tourism which project various functions and stimulate different behaviours. For example, previous study has revealed that spa is effective in stimulating repurchase (Ashton & Klinhom, 2020). Even the importance is highlighted, published article which directly analyse entertainment tourism is still in infancy. While entertainment can be defined in a much broader sense, some study focused on casinos only, particularly for research which was conducted in casino cities such as Las Vegas and Macau since the performance is transparently broadcasted in the electronic space and easily traceable. In fact, gaming and entertainment has always been considered a perfect union as facilities provided in casino properties could be very advanced (Christiansen & Brinkerhoff-Jacobs, 1995) and would attract entertainment tourists, thus fulfil the “impress customers” function of entertainment tourism (Luo & Lam, 2017). Furthermore, entertainment tourists who visited casino properties may contribute spillover effect, as “gaming might act as a potential gateway to gambling” (Kim & King, 2020, p. 373), suggesting the potential of adopting this win-win strategy in promoting sustainable development of the destination.

## **2.2 Entertainment Tourism in Macau**

Macau aka “Macao” is the Special Administrative Region of the People's Republic of China, bordering Guangdong province of China and neighbouring Zhuhai and Hong Kong. Covering a small area of 32.9 square kilometres and a population of 0.68 million, Macau generated a GDP per capita of USD 82,750.00 in 2019 (Macau Statistics and Census Service, 2020). Its economy has been heavily depended on the casino industry, which contributes more than half of the GDP and 90% of its tourism revenue (Deng, Gu, Law, & Lian, 2020). From the legitimate Fan-Tan house since 1849 to the big integrated casino resorts in recent decades, gambling has been the heart of tourism development. Even the popularity of the destination and fame of the industry, many Asians consider gambling and casino as sinful (Wong, Luo, & Fong, 2019). Therefore, Macau carries with it the potential to as well offer non-gambling entertainment with the newly-built mega integrated resorts such as The Venetian Macau, Studio City, Galaxy, etc. These properties possess spacious venue to offer performance show, laser show, family activities, exciting rides, spa etc. Throughout the years, local government has launched marketing campaigns to entice entertainment tourists, yet non-gambling elements still contributes a minor part of overall tourism revenue. In a similar vein, Las Vegas, who have also been casino-centred, has successfully transformed to entertainment centre with non-gambling elements supporting 63% of Las Vegas’ revenue (Deng et al., 2020). At present, Macau Government Tourist Office lists eight categories of entertainment and shows in their official websites, namely Shows, Family Fun, Aquatic Trek, Cultural and Creative Industry Zone, Sports and Recreation, Wellness, Gaming as well as Nightlife.

## **2.3 Industry Identity**

Regarded as multifaceted, identity is defined as a set of values and attributes one possesses that define themselves (Erikson, 1953). Over the years, recognition of identity have been enriched, from a constant set of rooted values to an unsteady interpretation constructed under factors such as culture, values, experiences (Beck, 1997). Scholar believes that identities are the result from the collections of traits (Castells, 2004). With regards to identity, the identity theory is a famous concept which considers identity as internal attachment that members of a group, a company, a nation, etc. denote their positions in the social structure, thus shaping their views, reactions and performance (Davis, Love, & Fares, 2019). While identity has been a well-addressed concept, literature on industry identity is scant (Glynn, 2008). In fact, defining industry identity can be problematic as academics

diverges in opinion. As in organization level, identity refers to the collective devotion and understanding of features leading to its success (Martínez, Pérez, & Rodriguez del Bosque, 2013), hence it is logical to position industry identity in similar angle, and refers it as the collective understanding and devotion of members which frame the pivotal and distinct characteristics advancing to the success of the industry (Dhalla & Oliver, 2013).

As identity possesses commercial, cultural and social purposes which affect perception, it could also be shaped by experience, and further develops in positive and/ or negative way (Xue et al., 2017). In tourism literature, personal identity serves as drivers for social movement and participations (Davis et al., 2019) and corporate identity builds sustainable competitive advantage (Martínez et al., 2013). The various types of identity literature, from tourist identity, destination identity, organizational identity and entrepreneur identity (Bredvold & Skålén, 2016; Lugosi, 2014) indicates that identity capacitates distinctiveness, and could generate comradeship that enable devotion and sustain development (Palmer, 1999). As the identity theory postulates, attitude and behavior correlates to identities (Nunkoo & Gursoy, 2012) which is interconnected to codes that differentiate themselves with others (Hsu & Hannan, 2005). Suppliers with strong industry identity tends to devote more and are willing to invest in such sector, as attitude determines future investment and the structure of their investment (Xue & Fang, 2018). Even multiple identities do exist (Palmer, 1999) and suppliers may carry more than one identity, weights of the respective identities may differ, especially when it comes to investment or decision that incurred cost with limited resources, or when business is facing adverse economic situation.

### **3. Methodology**

The objective of this study is to delve into characteristics and drivers of industry identity, hence qualitative approach is adopted to portray a detailed picture. This is also a common approach for the first stage examination of attitude (Hall, 2006; Papagni & Buckner, 2006; Snyder, 1999), as one of the mutual goals for qualitative method is to generate new ways of seeing existing data (Ochieng, 2009). In-depth face-to-face, semi-structure interviews were conducted in Macau and a total of 15 interviews were done using purposive sampling. Open-ended interview questions enable researchers to achieve a holistic understanding of respondents' point of view and uncover new information which yields valuable insights (Berry, 1999; Cavana, Delahaye, & Sekeran, 2001). Semi-structured questions were designed which allow related questions that responses to significant answers (Bryman & Bell, 2015). Laddering is used with its proven effectiveness in divulging values (Lin & Fu, 2017). Credibility, transferability and dependability is considered base on suggestions of previous literature (Lincoln & Guba, 1985). The respondents are all top management of private organizations (include both local and international business) in the entertainment tourism industry who have at least five years' working experience in Macau, which includes general manager, vice president and directors. Management groups are high involvement respondents as their career is linked to the industry prosperity, therefore they tends to spend more time and effort during the information collection process, offering a deeper insight (Kotler & Keller, 2016). In order to ensure the quality of data, respondents were first informed the aim and intentions of the interview. From time to time, they were reinforced that the discussion was focused on entertainment tourism, not merely casinos or a general view of tourism development. The average time for one single interview is 46 minutes, conducted at the place of convenience for respondents. The language used during the interviews was either Chinese or English, according to the mother tongue of the respondents or their preferences. The discussion was then typed in the respective languages and send back to the respondents for agreement of the contents. Content analysis was performed based on the transcripts of the interview, and a team of three is formed for content analysis. Each author code the transcripts individually accordingly to the key words. Text units are compared and discussed for agreements. If doubt or objection exists over a specific data, it would be identified as invalid.

Following table indicates profiles of the respondents. As full anonymity is promised, their names are replaced with a number, but basic demographic information is displaced to enhance transferability.

**Table 1.** Profile of respondents (N=15)

No.	Category	Business Type	Gender	Years in Industry
1	Gaming	multinational	Female	10
2	Gaming	multinational	Female	15
3	Family Fun	multinational	Female	12
4	Nightlife	local	Female	7
5	Sports & Recreation	multinational	Female	10
6	Gaming	local	Male	12
7	Sports & Recreation	multinational	Male	20
8	Nightlife	local	Female	10
9	Gaming	multinational	Male	11
10	Cultural & Creative Industry Zone	local	Male	6
11	Wellness	local	Female	5
12	Show	global	Female	10
13	Aquatic Trek	local	Male	5
14	Wellness	local	Female	20
15	Show	global	Female	10

## 4. Results and Discussion

### 4.1 Industry boundaries

The respondents identified several boundaries for entertainment tourism (Table 2). Even though all agreed that entertainment includes lots of elements and could be a broad concept, majority agrees to the top 4 categories, namely 1) performance, concerts and shows, 2) events, 3) gambling, 4) dining. Among which, dining is not under entertainment category of local tourist office website. Since the accreditation by UNESCO as the Creative City of Gastronomy, Macau has been activating marketing their diversified cuisines (Lai, 2020). Thus, this interesting discovery highlights the fact that when there is transformation of development direction, possibility of perception gap between destination marketers and industry suppliers may exist which requires further investigation. In this case, the combination of entertainment and gastronomy, in offering the “Eatertainment” (Josiam, Mattson, & Sullivan, 2004) is raised, signalling industry’s proactive sense for emerging market needs. As the need to invest for creative and innovative products is suggested (Mihajlović & Koncul, 2016), the use of

technology such as touchscreen table and performing robots could create interactive, innovative and entertaining dining experience which appeals different target markets.

**Table 2.** Suppliers' perception on industry boundaries

<b>Boundaries (Frequency)</b>	<b>Salient points</b>
Performance, concerts and shows (13)	Varieties is crucial in order to satisfy needs of different markets Rotation of show that draw repeated visitations. New elements that are unavailable in tourists 'countries are preferred
Events (10)	Year-round activities, special programs in different seasons and festivals Events with new elements
Gambling (8)	Years of reputation Tradition activities for visitors
Dining (8)	Restaurant and bars Expressed in the offering of food, service and servicescape
Shopping (6)	purposively designed and decorating shopping experience is entertaining
Sports and Recreation (5)	
Family activities (3)	Reasonable prices Inclusion of kids' facilities
Cutting-edge Games* (2)	New items and cooperation with famous brands/icons
Spa and Wellness (2)	Require stronger promotion, otherwise mostly local participations

Note: \* Cutting-edge games refers to AR, VR, AI experience, etc.

In addition to the above listed boundaries, the importance of varieties was also well addressed, suggesting the need of wider ranges of offerings satisfying the needs of target markets at different expenditure level. The results reveal that despite a mutual understanding for the importance of diversification in entertainment products, there is a perception gap between industry and government, enjoining discussion between industry and government in filling this gap.

“Entertainment tourism includes lots of elements, and the key is to satisfy the needs of tourists.” (Interviewee 2)

“Some people enjoy hiking, some prefer going to park, and some would like to go to concert show. These are all entertainment tourism. Tourists have different needs that need to be identified.” (Interviewee 9)

“Entertainment is broad. For example, concert, circus show, indoor ski zone. The activities need to be changed from time to time according to market needs.” (Interviewee 3)

“Entertainment tourism can target family. Only provide high-end products may not satisfy the needs of this market.” (Interviewee 7)

## ***4.2 Determinants of Industry Identity***

### ***4.2.1 Government policies***

Government policies impacts on the overall tourism development (David, 2015). While the clout of government policy on national identity was revealed (Houlihan, 1997), its decisive influence is also pinpointed in industry identity. During the interviews, almost all the participants emphasized that supportive policies such as subsidies, tax reduction, specific communication channels and removal of entry barriers is essential. Financial aid such as interest-free loan can be granted to local residents who plan to develop or expand their entertainment business. This agrees with Kamassi, Manaf, and Omar (2020)’s work that government support is essential for industry growth. While subsidy is preferred, types of subsidy and beneficiary should be further analyzed. It is suggested that the length of business and/or total investment could be prerequisite of subsidy application as these indicators reflect involvement and devotion in the industry. Furthermore, a simplified process in establishing entertainment business is suggested for socially responsible, environmentally-friendly, and/or local owned business.

“Government support is crucial. There are too many legal procedures before my business can really operate.” (Interviewee 6)

“There could be inclined policy for some industry that motivate us to take part in it. Tax exemption or financial aid sometimes push development.” (Interviewee 8)

### ***4.2.2 Marketing***

Respondents emphasized it is vital to have an effective and specific marketing plan. This finding agrees with Xue and Fang (2018)’s work that powerful tourism promotion is essential to industry development. In this specific aspect, promotion that highlight Macau’s entertainment experience through various types of unique experiences are necessary in creating a vivid image of entertainment centre. Despite availability of entertainment resources, marketing was a major challenge due to the lack of a concrete image, leading tourists to associate Macau with big casino resorts instead of the joyful paradise of entertainment. Since the effectiveness of online destination image in attracting tourists is proven (Rahman, Ahmed, Sharmin, & Akhter, 2021), further investigation on market preference of entertainment elements and a clear boundary identified in marketing materials is crucial. Destination planner should take leading role in uniting various sector of entertainment industry in promotion, in the forms of association or committee involved in the planning and implementation process.

“We need to create a sharp industry identity in activities, marketing, etc.” (Interviewee 4)

“People from around the world should know our unique entertainment products.” (Interviewee 5)

“Government need to unite us for promotion. What we did as a single unit is insufficient. They need to lead.” (Interviewee 9)

### **4.2.3 Culture**

Identity is closely tied to culture (Dutton & Dukerich, 1991). For entertainment tourism, one of the challenges for industry identity is that in some culture in Asia, the term “entertainment” may lead to perception of adult activities. While Macau has also been perceived as adult-oriented nightlife city (Glenn, 2008), a careful definition of entertainment and promotion campaign should be in place. On the other hand, since Chinese has been identified as hard-core gamblers (Vong, 2007), it is natural for westerns casino operators and tourism suppliers to carry the traditional casino industry identity. In fact, it is discovered that even stakeholders may not considered gambling as a form of entertainment (Rolando, Scavarda, Jarre, & Beccaria, 2020), thus a clear recognition of contemporary definition should be ensured.

“The word entertainment may not be appealing for some markets. They may associate it with adult entertainment.” (Interviewee 7)

“Entertainment is very broad to me. Perception is the problem as different culture expects and associate activities differently.” (Interviewee 12)

### **4.2.4 Resources**

Respondents mentioned the lack of natural and human resources, but affirm that insufficient local talent is one of the core obstacles in determining industry identity. In addition, it is mentioned that resources are uniform, resulting in amplified industry identity of big suppliers such as the mega integrated resorts in COTAI district that offer shows and events (Luo, Lam, & Ye, 2019). Thus, respondents highlighted the need of local training which support entertainment talents and reduce the need of imported talents. A standardized training and reconfiguration plan should be in place to tackle the core problem in the training gap. Often, entertainment tourism professional requires more than generic skills such as communication or language skills. For instant, all-year-round show require talents that are familiar with stage performance costume and specific light control, and the kind of training is absent in Macau. Even there are arguments that short courses can fill the gap, often the type of training is vague. For example, materials and technique in the preparation of more-enduring stage costume, pre-set and quick-change requirement is not available in ordinary fashion design courses. Failure to output local talents that sustain the whole program operation and over reliance of imported talents hinder industry identity construction.

“It is weak to claim that we are the entertainment industry when we basically just manage imported talents.” (Interviewee 10)

“Local talents are insufficient. We need to hire from outside because we don’t have the kind of training available.” (Interviewee 13)

### **4.2.5 Financial concern**

Supplier reveal that their attitude is closely related to financial concern, such as initial investment, return on investment and opportunity cost. As the “industry driven characteristic leads to preferences in profit centers of

the business” (McKercher, 1993, p. 13), business revenue, costs and expected profit affect supplier’s attitude, leading to the unavoidable consequences of aligned identity towards the profit generating sector. Even though entertainment products tend to have short life cycles (Hennig-Thurau & Houston, 2019), five to ten years’ master plan initiated by government would encourage suppliers to devote continuous investment and additional resources for long-term development. While integrated resort operators always considered casinos as the profit centre and others sectors as tactics (cost) in stimulating visitation, it is thus important to evaluate the potentials of other non-gaming elements.

“I need to calculate, if I investment 1million, how long would I breakeven? Is government supporting long term development?” (Interviewee 8)

“We have concerts that provides additional visitation, but casinos generate the profit.” (Interviewee 1)

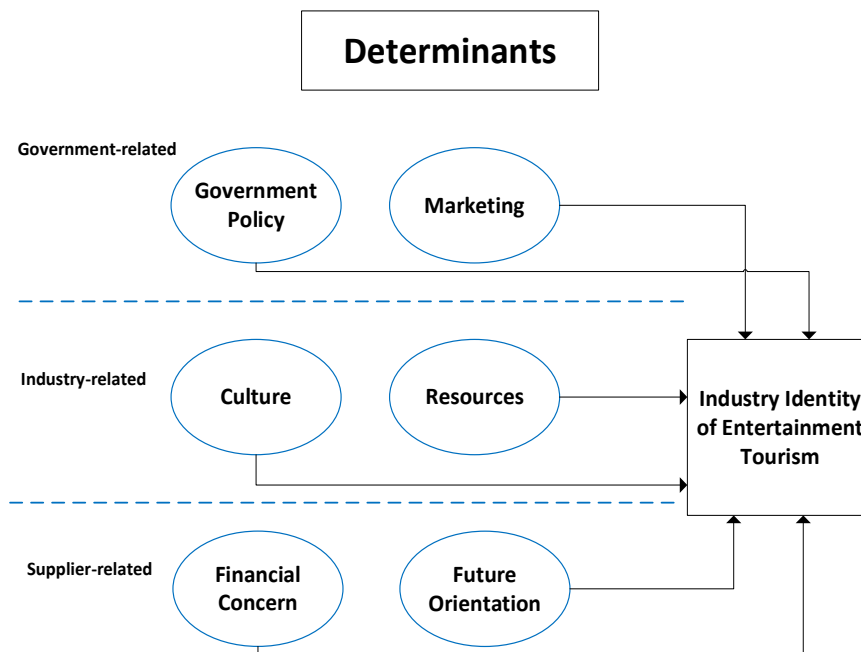
#### **4.2.6 Future Orientation**

Industry identity is influenced by supplier’s perceived economic benefits and future prosperity, as previous research has indicated that industry attitude is lined with current and potential benefits (Lankford & Howard, 1994). Entertainment tourism bridges tourism and entertainment industry, and expands tourist base. Respondent from shows and entertainment category appeared to be more concern about central government policies while respondent from spa and wellness concern about the cost and imported labour policies with regards to their future orientation (See Figure 1).

“Of course, we will consider ourselves belongs to the industry if it is influential and potential.” (Interviewee 8)

“Entertainment is a huge investment, we need to understand what it can bring us in the future, and revenue affect our participation.” (Interviewee 12)

**Figure 1.** Determinants of industry identity of entertainment tourism



## 5. Conclusions and Limitations

This study coalesces identity theory and industry development to uncover determinants for industry identity. While traditional identity theory suggests interaction and consequences of individuals with the society under two streams of study: the linkages of social structures with identities and the internal process of self-verification (Stryker & Burke, 2000), this study expands it in the context of industry. This study draws upon identity theory and fills the research gap of limited literature of in supplier perspective, as aforementioned research of identity in tourism context focuses on national or resident level. Second, typical business identity study illustrates a control process projected from the corporation outwards to the society. For example, study of organizational identity focuses on the judgment and definition of decision makers in the pursuit of perceived interests for the organization (Cheney & Tompkins, 1987), while belonging to an industry is cognitive/perceptual travelling self-reference (Knippenberg & Sleebos, 2006). In the current study, identity is illustrated as an external attracting force, the synthesis of the always-changing market attributes, which navigates internal changes and underlined behaviours such as devotion, marketing resources, etc. of many corporations within/related to the industry. As industry identity correlates with the supplier's long-term devotion rather than merely an image they emanated, it is thus crucial to examine this external force which sustain future developments. Third, this study adds body to the scant literature of entertainment tourism through the investigation of identity drivers.

In practice, the promotion of leisure and entertainment elements of casino venues within the destination enables additional revenue through existing products and facilities, and could be one of solution to scholars who try to identify buffers of problem gambling issues (e.g., Lopez-Gonzalez, Rius-Buitrago, Jimenez-Murcia, & Griffiths, 2020; Mishra, Beshai, Wuth, & Refaie, 2019). The crucial drivers of successful identity shed lights for destination developer and policy maker, enabling the enhancement of stronger momentum towards industry success with industry that shatter a healthier image. This study also offers valuable identity information from suppliers' angle,

which differs from the mainstream empirical research which collect information from tourists and residents. As Liburd and Edwards (2010) suggested, sustainability should also be supplier-driven and destination that fail to consider supplier's attitude towards long term development may lead to a withdrawal of existing and potential quality supplier which affect aggregate offerings. The findings of this study also highlight the importance of uniqueness and understanding of market needs that require frequent evaluation and investigation, as well as better cooperation between suppliers and government.

In spite of the theoretical and practical underpinned by this study, like other research, there are limitations. This study adopted a qualitative study of specific target of entertainment tourism, and a focus group using similar questions may have added further insight, or quantitative research based on the factors generated could be promising. It is strongly suggested that, when resources are adequate, a larger sample could be adopted and the intensity of support and devotion to be further studied. The findings here indicate attitude at one specific time, and longitudinal studies that examine the changes could be useful. In addition, more attention to the market needs and preference of entertainment products would be rosy.

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