



Discussion paper

Integrated resort: A review of research and directions for future study



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ABSTRACT

Recently, there is increasing interest in integrated resort based destination which is a converged location for both gaming and non-gaming travel services including lodging, eating and drinking places, entertainment, retail, and convention targeted for large market segments. This paper reviews a content analysis of integrated resort papers published in the hospitality and tourism literature over the past 26 years (1991–2017). Based on a detailed examination of the contents, a database consisting of information on (1) study expansion, (2) study locations, (3) major subject domains, and (4) research methodology was developed. A series of trends that describe the growth of integrated resort research has been identified. The findings provide the first thematic overview of the integrated resort industry derived from literature. General and academic interests are discussed, along with limitations and suggested areas for future research.

1. Introduction

A number of recent studies have used the term “integrated resort” in relation to properties that converge travel functions of leisure businesses, casinos, hotels, food and beverage services, shopping malls, and showroom (Gao and Lai, 2015; Hobson, 2002; Lam et al., 2011; Philander and Zhong, 2016; Suh and Lucas, 2011; Yang et al., 2017). There have been numerous attempts to define the integrated resort and identify how the integrated resort differs from tourism products. For instance, MacDonald and Eadington identified the integrated resort as the “a multi-billion-dollar multi-dimensional resort that includes a casino that takes up no more than 10% of the resort’s public floor space, but where the casino operators generate, at least, US\$300 million in gaming revenues” (2008, pp. 5–6). Similarly, Lucas and Kilby (2011) suggested that the integrated resort is a gaming resort that includes nongaming amenities ranging from dining establishments and night-clubs to retail shopping malls and multi-purpose arenas. These definitions are useful because they highlight two key components of the integrated resort: (1) gaming (e.g., casino, slot machines, table games) and (2) non-gaming (hotels, food and beverage, shopping mall, convention center, and entertainment shows) leisure businesses. Thus, in this study, the term “integrated resort” is used to represent the new tourism products which attract both gaming and non-gaming customers (Eadington and Doyle, 2009).

After the tourism industry created the idea of an integrated resort to expand and diversify customer segments by providing one-stop comprehensive entertainment centers, it leads the success of integrated

resort based destinations such as Las Vegas, Macau, Singapore, and Philippine (Gao and Lai, 2015). For instance, the gaming revenue in Macau was \$ 10 billion and over 20 million customers visit integrated resorts in Macau. Developing integrated resorts helps to boost the local and national tourism, creating jobs, and providing the benefit from competitive tourism market. Thus tourism service providers have employed the integrated resort model rather than focusing gaming customers (Hung et al., 2010). Now, integrated resort industry is gaining increasing attention, and more and more countries plan to invest multi millions of dollars developing the integrated resort (So et al., 2011). Integrated resort destinations first evolved in the United States, but are now found in a growing number of countries, including Canada, South Africa, Malaysia, Australia, Macau, South Korea, and Singapore. Furthermore, other countries have attempted to legalize and developed the integrated resort. For instance, MGM Mirage announced a partnership with an Abu Dhabi government-owned development company to build a \$3 billion integrated resort (Eadington and Christiansen, 2007). Based on the data from the Statista (2015), the global gaming industry is estimated generating over \$ 400 billion in 2016 (Statista, 2015).

The global tourism market is growing rapidly with increasing numbers of middle-class and Millennials pursuing high-quality travel services. This phenomenon means that integrated resorts have benefits to travelers result from providing premium travel services and products at one location. Recently, increased development has occurred in the form of the integrated resort, integrated hotel, and multi-resort, offering competitive services to international travelers. Especially noteworthy is the growing number of Chinese customers interested in

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gambling, which is greatly motivating service providers' participation and engagement with international gaming customers. Macau receives a large number of Chinese travelers who enjoy not the only casino but also the cultural elements, scenery, and shopping environment (Li et al., 2016). The totality of these trends shows that the integrated resort industry is a promising and competitive sector—as such, gathering information on and exploring the particular attributes of this area is the critical first step in engaging this industry.

Research has not overlooked recent interest in integrated resorts. Numerous researchers have examined the integrated resort phenomenon over the past few years. Some authors have postulated the impact of community support on integrated resort development (Nunkoo and Ramkissoon, 2009; Eraqi, 2007). Other studies have focused on customers' attitudes toward the gaming and non-gaming attributes of the integrated resort (Gao and Lai, 2015). These studies are providing an essential framework for understanding the integrated resort. Despite the proliferation of research in the integrated resort industry to date, little has been done to examine the main research issues and provide a holistic view of the context for the understanding of this phenomenon. A review of past research provides the necessary foundation for a theoretical exploration and the understanding of research practices in the field (Baloglu and Assante, 1999). Thus, using past literature on the aspect of the integrated resort give the insight of how far the integrated resort research has progressed and suggested the future direction.

The purpose of this study is to review the integrated resort literature published in hospitality and tourism journals. The articles related to integrated resorts have been collected and collated using keyword search (“integrated resort”) from 1991 to 2017. Content analysis was used to identify themes and sub themes that emerged from the qualitative data, and to construct conclusions and suggestions for future studies. The authors analyzed the contents of 91 articles to identify a thematic perspective during that period. The results provided research trends and knowledge gaps to help guide research in the future. The authors organized the results into study locations, major subject domains, and research methodology.

2. Methods

Content analysis provides not only an understanding of the current phenomenon but also an empirical starting point for future research with valuable perspective (Baloglu and Assante, 1999; Bowen and Sparks, 1998; Chon et al., 1989; Oh et al., 2004). Therefore, in this study, content analysis was used as an analytic technique to understand previous research and provide a guideline for future studies on integrated resorts. For this study, a content analysis of the papers published in the hospitality and tourism literature was conducted. The articles related to integrated resorts were searched using the keyword.

Data were collected and collated from 1991 to 2017 on the understanding of the change of the casino industry. The gaming industry has expanded worldwide after Nevada first legalized gaming in 1931. An attractive growth was observed in the casino industry after the gaming legislation in many countries. Casinos have been legalized in South Korea (1967), Australia (1973), the Philippines (1977), Spain (1990/1978), New Zealand (1990), Canada (1990), and South Africa (1995) (Goodman, 1995). Macau is one of the best-known gaming destinations and had more than 150 years of experience in gaming industry. During the early stage, most of the casinos rely on the local population. However, in the 1990s, casino service providers realized that only casinos are not enough to attract customers and they focused on their service to complimentary rooms, meal coupons, and machine tokens to increase customers' satisfaction and casino revenue (Hashimoto et al., 1998). Furthermore, non-gaming travel services are getting attention because many customers visit casinos as a sense of fun and excitement rather than just to play games (Hashimoto et al., 1998). It leads a change of the traditional gaming industry and then results in the emergence of the integrated resort. In 2000–2010s, there is a

movement from the casino resort/hotel to the integrated resorts. In 2002, Singaporean government legalized casino operation and developed two integrated resorts and in 2002, the total annual revenues of two integrated resorts were USD\$2.8 billion in 2010 and USD\$4.1 billion in 2013 (UNLV Center for Gaming Research, 2014). Based on this change of the casino industry, the authors focus on integrated resort studies from 1991 to 2017.

Systematic analyses of articles published in the leading hospitality and tourism journals, including *Annals of Tourism Research*, *Cornell Hotel & Administration Quarterly*, *Journal of Sustainable Tourism*, *Journal of Travel Research*, *International Journal of Contemporary Hospitality Management*, *International Journal of Contemporary Hospitality Management*, *International Journal of Hospitality Management*, *International Journal of Tourism Research*, *Tourism & Hospitality Research* and *Tourism Management*, were conducted. Also, peer-reviewed articles were included within ProQuest and EBSCOhost, respectively, as well as Google Scholar.

A total of 91 papers including 76 studies published in academic journals, 9 papers from conference proceedings, and 6 dissertation and thesis studies were reviewed. References to non-journal items, such as books and book chapters, were excluded from the analysis, because they tend not to be peer-reviewed but rather invited. The selected articles were reviewed and categorized into the following: (1) year of publication, (2) locations of the study, (3) main subject domains (e.g., integrated resort development; integrated resort impact; integrated resort management; integrated resort marketing; and integrated resort and meetings, incentives, conventions, and events), and (4) research methodology. The categories of research subject themes were divided into conceptual and empirical studies. Conceptual papers refer to those that discuss the concepts and theoretical issues and do not employ data analysis. Empirical papers are defined as those that use qualitative or quantitative data analysis. The key subject domains of empirical papers were derived from paper titles, keywords, abstracts, and full text. The categories of research methodology were based on the study subjects and data analysis.

3. Results

3.1. Publication expansion

The rising interest in integrated resorts as an academic field can be seen through the number of publication. A total of 14 papers were published during the first 10-year period (1991–2000). The number of articles almost doubled in the second 10-year period (2001–2010), reaching to 41 papers and 50 in the recent 7-year period (2011–2017). Increasing number of publications on integrated resorts suggests that growing interest of the industry and also enhances in the increasing proportion of empirical studies. Conceptual discussion on integrated resorts has focused mainly on the first and the second 10-year period. From 1991 to 2010, over 57% of the papers were conceptual studies. As the concept of integrated resort received widespread acceptance in academia and business, studies were concentrated on understanding its effects and practical implications. From 2011 to 2017, 76% of the published papers were empirical studies. In addition to development and planning issues, new topics and approaches were developed, including showroom entertainment (Suh and Lucas, 2011), sports tourism (Dansero and Puttilli, 2012), integrated resort and its relationship with the MICE industry (McCartney, 2008; So et al., 2011), and carrying sustainability (Ayala, 1993; Bui, 2007) over time. These studies examined various factors that affect business performance, such as markets, competitors, customers, suppliers, governmental regulations, and policies.

3.2. Study locations

The authors characterized the studies according to geographical

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