The influence of online travel agent performance on customer satisfaction levels at a selected hotel

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DECLARATION

I, Ignus le Roux, s9544113, hereby declare that the treatise for Masters in Business Administration is my own work and has not been previously submitted for assessment or completion of any postgraduate qualification to another university, or for another qualification.

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ABSTRACT

Tourism is an international industry; constant evolution is taking place in the marketing of tourism products and the expectation levels of hotel guests. Online Travel Agents have become more dominant in recent years. This dominance has been assisted by travellers' more frequent use of the internet to search for information, by the bundling of heterogeneous products and by these agents' use of the social media. Guest satisfaction levels and expectations are impacted by changes in lifestyle, reasons for travel and the information accessed prior to making their reservations.

The basis of this study was establishing the impact of the information supplied by Online Travel Agents on guest satisfaction levels at The Monarch Hotel. The evolution and function of the tourism distribution channel and the factors affecting guest satisfaction and its measurement were explored.

The research revealed that for the tourism distribution channel the basics, such as sharing information and introducing the buyer and seller remained the same. The internet has introduced efficiencies that make the access of information easier and reduce the barriers of entry previously encountered by smaller hotels.

With regard to guest satisfaction, there has been a transition from tangible elements to intangible elements such as service quality and interaction with employees. The internet, particularly the social media, are impacting guest expectations. Notwithstanding, it must be noted that some of the information on these platforms is either untrue, or overstated.

The study found that the guests at The Monarch who booked via an Online Travel Agent were highly satisfied, not too concerned about price, had few complaints, and demonstrated a high level of loyalty.

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CHAPTER 1

SCOPE OF THE STUDY

1.1   INTRODUCTION

Tourism is an international industry and one of the biggest providers of employment on the planet. According to the 2012 World Travel and Tourism Council report, in 2011 the travel and tourism industry contributed 9 percent of global GDP, which accounted for over US$6 trillion and 255 million jobs (Thakran and Verma, 2013).

Tourism boasts a larger range of heterogeneous stakeholders than many other industries. The fast-tracking, synergistic interaction between technology and tourism in recent years has fundamentally changed the industry and our perceptions of its nature (Buhalis and Law, 2008).

According to Buhalis and Law (2008), technology has also changed the efficiency and effectiveness of tourism organisations, the way business is conducted and how consumers interact with tourism organisations. Technology empowers consumers to identify, purchase and customise tourism products and assists tourism organizations to develop, manage and distribute their offerings worldwide (Buhalis & Law, 2008).

Tourism is a significant industry in South Africa. According to the 2012 Annual Tourism report for South Africa, tourism directly contributed 3% (R84.3 billion) of the total gross domestic product of South Africa and directly employed 4.5% (598 432) of the population in 2011 (at the time of the research, employment data for 2012 was not available). According to the 2009 annual Tourism report for South Africa, the tourism industry directly employed 389 100 people and an additional 530 700 indirectly. Thus over two years, 209 332 new jobs directly in tourism were created.

Excluding capital expenditure, tourist foreign direct spending in South Africa was R76.4 billion in 2012. In 2012 foreign tourists spent an average of R8 900 per trip while in South Africa, which equates to R1 080 per day. South Africa experienced a growth of 10.2% (from 8 339 354 in 2011 to 9 188 368 in 2012) in international

tourist arrivals compared with the 2012 worldwide growth of 3.9%. In 2012 South Africa was ranked 34th among global tourism destinations. It was ranked third on the African continent: Egypt was ranked first and Morocco second.

In 2012 there was also an increase of 8% in domestic tourism, but this market is small compared with the international market; it generated R21.8 billion and domestic tourists spend R850 per trip. However, it needs to be noted that visiting friends and relatives (VFR) makes up a large portion of domestic tourism, which has an impact on the revenue generated. In 2012, 52% of the domestic tourism revenue was generated by VFR, 23% for holiday purposes and 17% for business reasons. Other reasons for travel mentioned in the report are religious and medical.

The researcher has been in the tourism industry for the past fifteen years in the employ of Mantis, a Hotel Management and Marketing company. Mantis' responsibility is to ensure that hotels are managed and marketed, on behalf of owners, in such a way that the hotel is profitable, that guests feel at home, and have unforgettable (positive) experiences.

This research was inspired by a fictional film, namely, The Best Exotic Marigold Hotel, for the elderly. There are numerous examples on the internet, especially on www.tripadvisor.com a travel review website. Guests booked rooms at a hotel and when they arrived the facilities did not match the expectations created by either the brochure or the hotel's website, of the hotel, the information supplied by the travel agent, or any of the numerous websites on the Internet.

The film resonated with me because at Mantis, my job is to ensure that the various marketing collateral that is developed is a true reflection of the hotel: it also needs to be adapted for various target markets. The various characters in the movie heard about the hotel via different means, the internet or the hotel's brochure. They made the journey there for different reasons. One character was there to search for an old friend and another for a medical procedure.

The connecting flight from Mumbai to their final destination was cancelled and thus the characters had to make their own way not only to the hotel, but also the city in

which the hotel was situated. This journey was an adventure in itself and also gave the characters a taste of what to expect in India. The characters in the film, when they arrived at the hotel, were very disappointed with the facilities.

The hotel was run down and not what they expected. There are various story lines in the movie. Although there was not much improvement to the physical facilities of the hotel, towards the end of the film almost all of the characters enjoyed their stay. To quote a saying from the lead character Sonny: "Everything will be all right in the end; if it's not all right then it's not yet the end."

The researcher is of the opinion that one of the reasons why the guests enjoyed their stay was because they accepted their environment, enjoyed building relationships with the other guests and because they engaged with the staff of the hotel.

This is an important observation and it is accentuated by Kandampully and Hu's (2007) research, which found that although the quality of service is defined by the customer, and created by employees, it is the human factor that holds the ultimate balance of quality in service industries. The authors quote the credo of the Ritz Carlton hotel: "We are ladies and gentlemen serving ladies and gentlemen" to emphasise the importance of the quality of employees.

A Google search conducted to establish if there was any merit in conducting further research on guest satisfaction levels at hotels, found a survey conducted by J.D. Power and Associates.

In the 2012 North America Hotel Guest Satisfaction Index Study published on the 25th of July 2012, guest satisfaction continues to decline as hoteliers fall further behind on expectations of guests. In its 16th year, the study measured hotel guest satisfaction across seven hotel segments: luxury; upper upscale; upscale; mid-scale full service; mid-scale limited service; economy/budget; and extended stay.

Seven key measures are examined within each segment to determine overall satisfaction: reservations; check-in/check-out; guest room; food and beverage; hotel services; hotel facilities; and costs and fees.

Overall guest satisfaction has decreased with 7 points from 764 in 2011 to 757 in 2012 on a 1,000-point scale. Guest satisfaction, however, deteriorated much more than this score suggests, as relatively high levels of satisfaction with cost and fees masked the decline in other areas of the guest experience. Satisfaction with check-in/check-out procedures; food and beverage; hotel services and hotel facilities are at new lows since the 2006 study and satisfaction with guest rooms has declined within one point of its lowest level in the past seven years.

The J.D. Power and Associates study furthermore measured guest satisfaction and the relationship between method of reservation and level of satisfaction. They concluded that guests who book through an online travel agency (OTA) tend to be more price-sensitive and report more problems, have lower levels of satisfaction with their stay, and are less loyal to hotel brands, than guests who book through the hotel website, or call the hotel or hotel brand directly. Satisfaction ratings among guests who booked through the hotel brand website or called directly averaged 774 and 768 points (on a 1000-point scale), respectively, compared with guests who booked through an independent website or OTA (729 points).

The results from the abovementioned study regarding the lower satisfaction levels of guest's who booked through an independent website or OTA, provided the final inspiration to the researcher to conduct research on the satisfaction levels of guest who booked through an OTA at The Monarch Hotel.

The current study sought to establish whether the satisfaction levels of guests of The Monarch Hotel who booked via an OTA were higher or lower than the average guest satisfaction levels established by the internal measuring tool, E-Guestserv, being used by the hotel.

1.2   ABOUT THE HOTEL

The Monarch Hotel is part of the portfolio of hotels Mantis manages and markets. The hotel originally opened its doors in 2009, but owing to extensive construction of the Gautrain in the Rosebank area, it closed its doors in December 2010 and reopened in August 2012.

The hotel is situated at 167 Oxford Road, Rosebank, Johannesburg, is 5-star and is owned by the Industrial Development Corporation. The hotel has 12 rooms, a 60 seat restaurant, a 20 seat conference facility, a 10 seat boardroom, a cigar lounge, a reception area and an open air courtyard. The main target market for the hotel is business people who are in need of accommodation in Johannesburg, predominantly in the Rosebank area. Over weekends it is frequented by guests who are in Johannesburg for leisure purposes.

In 2013 the hotel employed 32 staff, and operated at an average occupancy of 63% and a rate of R1294. The average rate is calculated after Value Added Tax (VAT), commissions to suppliers and the internal breakfast allocation of R150 per person. The approximate selling price per room per night in 2013 was thus in the region of R2000 including VAT, commissions and breakfast. The term approximate selling price is used, since the hotel is making use of yield management principles based on supply and demand. The higher the occupancy, the higher the rate and vice versa.

Suppliers receive an average percentage commission of 15%; some clients receive 25%, some 20%, and some 10%; then there are clients who make bookings directly with the hotel and no commissions has to be paid. The average number of people per room is 1,2. This low occupancy rate is mostly due to the main target market of the hotel. and is calculated by dividing the number of actual guests who stay at the hotel into the number of rooms sold.

The hotel has a number of competitor hotels on its doorstep, namely, the Hyatt, 54 on Bath, The Courtyard Rosebank, Holiday Inn Rosebank and the Winston Hotel. All these hotels are much bigger than the Monarch, The Hyatt, for example, has 244 rooms and the Winston 34.   The Monarch uses its size as one of its main

differentiation strategies. This and its staff compliment ratio of 2 employees for every guest, provides personalized service.

1.2.1   Reviewing eGuestsurv, Tripadvisor, Booking.com and Expedia

1.2.1.1 eGuestsurv

The Monarch Hotel uses an electronic guest survey that is sent to guests post checkout. A company called Diversified Technologies supplies the service and the software used is called eGuestSurv. Previously, a printed survey was placed on the bed on the night before departure and was thus reliant on guests handing these in at check-out, or housekeeping collecting them when cleaning rooms.

The hotel deployed the technology in May 2013 and has thus been able to measure its performance for more than 12 months. The accuracy of the questionnaires relies on staff capturing the e-mail addresses of guests correctly and on guests supplying their correct contact details. These addresses are collected directly from the Property Management System (Opera) by eGuestsurv.

A copy of the e-mail sent to guests is included as Addendum A: the actual questionnaire is included as Addendum B. Guests are asked to rate each of 10 questions out of 10. The 10 questions are then summarized into eight categories - Housekeeping, Experience, Loyalty, Room, Value, Reception, Hospitality, and Food and Beverage. The full report is included as Addendum C.

The hotel has been set a 90% target for satisfaction levels, which is in line with the group's target. eGuestsurv also supplies the ratings from other 5-star hotels and the averages of the other Mantis hotels that use this service. As can be seen in Table 1, the Monarch Hotel is performing well above the set target, as are other 5-star hotels.

Closer investigation into the 12 month rolling rating, revealed that The Monarch received the lowest rating for Food and Beverage (less than 90,85%), and the highest for Housekeeping (an average of 96,59%).

Table 1: Summary of eGuestsurv ratings

eGuestsurv ratings	Sep	3 months	12 months
Monarch Hotel	96,76	94,73	94,11
Brand - Mantis	94,18	94,30	93,04
Five star	91,74	91,85	91,26
Five star - City Hotel	90,44	90,32	89,50
Five star - City Hotel - Gauteng	90,37	89,54	88,97

Source: *eGuestsurv August 2014 monthly report (Addendum C)*

As can be seen in Table 2, less than 30% of The Monarch's guests complete the questionnaires. Although not all surveys sent out were delivered, the researcher identified that there is no countercheck of the number of guests who stay at the hotel and the number of questionnaires sent out.

Table 2: Summary of surveys sent and delivered, and responses received.

	Aug	3 months	12 months
Surveys sent	80	176	443
Surveys Undelivered	3	6	24
Responses received	19	49	127
Responses not received	58	121	419
% Undelivered	4%	3%	5%
% Response rate	24%	28%	29%

Source: *eGuestsurv August 2014 monthly report (Addendum C)*

The hotel recently (no specific date could be ascertained) began to ask respondents whether their ratings and comments could be shared on social media and the hotel's website. When guests agree, as part of the review they are notified that the review is collected in partnership with the hotel. At the time of writing, all ratings and comments were shared only on TripAdvisor.

1.2.1.2 TripAdvisor

The Monarch Hotel was rated third among 72 Johannesburg hotels. When I perused www.tripadvisor.com on 29 September 2014, the rating from 55 reviews was 96%. Table 3 summarises TripAdvisor ratings.

Table 3: Summary of TripAdvisor ratings.

Category	Score out of 5	Traveller Rating	Number	See Reviews for	Number
Sleep Quality	5	Excellent	47	Families	3
Location	4.5	Very Good	6	Couples	26
Rooms	5	Average	1	Solo	4
Service	5	Poor	0	Business	16
Value	4.5	Terrible	1		
Cleanliness	5				

Source: *www.tripadvisor.com* (29 September 2014)

Closer examination into the 'Average' and 'Terrible' ratings, revealed the following.

The guests who gave the hotel an average rating felt that the staff treated him/her as if he/she did not belong, or fit in at the hotel. This guest felt that because they were dressed in khaki and not high heels and a business suit like the other guests, they forfeited respect. This specific review was posted on September 2014 with the headline 'Attitude'. These guests also stayed at another Mantis hotel, Oceana, and believed that the hospitality received at The Monarch was not comparable to that received at Oceana.

A guest who wanted to eat lunch with friends at the hotel posted the 'Terrible' rating in July 2010. The reason was that a front of house staff member refused them access as they had two small children with them. This staff member was described as having a harsh demeanor and the deportment of an Amsterdam streetwalker. The headline used was "Disgraceful – avoid at all costs".

In contrast, in the 'Excellent reviews', phrases such as "Excellent", "What an experience", "Absolutely Excellent Accommodations" and "Treated like Royalty" were used.

1.2.1.3 Booking.com

The Monarch Hotel is rated as 'Superb' on www.booking.com with a rating of 9.4 out of 10 from 117 reviews (see Table 4).

Table 4: Summary of Booking.com ratings.

Category	Score out of 10	Category	Score out of 10
Cleanliness	9.7	Staff	9.6
Comfort	9.8	Value for money	9.2
Location	9	Wi-Fi	9.2
Facilities	9.4	Sleep Quality	10

Source: *www.booking.com (29 September 2014)*

When perusing some of the reviews on www.booking.com, the researcher found that the same guest who posted the 'Average' review on TripAdvisor, posted similar comments with the same headline (Attitude) on Booking.com. However, in this specific review, the guest stated that all was good, except for the attitude of staff.

Similar headlines as those on Tripadvisor, such as "Fabulous Stay" and "Excellent Hotel", were used on Booking.com. A headline that stood out was "Richard the waiter" with an accompanying comment, "I particularly recall Richard the waiter and how kind he was". The friendliness of the staff and the service they provide were highlighted in a number of the reviews.

In addition, there was a review that gave a 10 out of 10 rating, accompanied by a comment that the reviewer's colleague had a room next to some mechanical equipment that kept the colleague awake all night. Other negative comments were

that the hotel is not listed on any GPS and it is difficult to see the name of the hotel from the street.

1.2.1.4 Expedia

The Monarch was given 5 out of 5 in 22 reviews on www.expedia.com and rated as Exceptional (see Table 5).

Table 5: Summary of Expedia ratings

Category	Score out of 5
Room Cleanliness	5
Service and staff	4.8
Room Comfort	5
Hotel Condition	4.9

Source: *www.expedia.com (29 September 2014)*

All 22 guests who posted a review would recommend the hotel; it was recommended for 'everyone', 'couples', 'families', 'personal events', 'business travellers', and as an 'overnight stay before destination'.

Two of the reviews that stood out to the researcher, considering the results from the J.D, Power and Associates research was: "Great Luxury Hotel that won't break the budget!" and "At the price it was a steal!" Both these reviewers also made mention of the good location of the hotel, which was repeated by a number of other guests. The proximity to the Rosebank mall and Gautrain station was mentioned by a few.

The researcher found one review posted by guests who have stayed at the hotel before. There are also 2 reviews in a European language, posted by business travelers. On Expedia all Tripadvisor reviews are also shown, as Expedia owns Tripadvisor.

Headlines such as "Outstanding city Oasis", "Amazing!! Must stay" and "Royal accommodation in convenient area" echoes those comments made on Tripadvisor and Booking.com. There were however one review where guests did not enjoy their dinner, but they thought breakfast was the best they ever had.

What needs to be highlighted is that over all four of these rating platforms, The Monarch Hotel scored above 94%.

1.3   MANAGEMENT DILEMMA

The Monarch Hotel relies predominantly on the internet, and particularly Online Travel Agents (OTA) to generate revenue and market the hotel. Sixty-eight percent of all guests who stayed at the hotel between 1 March and 31 August 2014 made their reservations via the internet. Of this 68% only 15% (10% of all guests) made their bookings via the hotel's own website. The remaining 32% either phoned the hotel directly, or were booked in by travel agents or their respective companies.

The dilemma Mantis is facing is that The Monarch could be trading in or attracting the wrong market by selling the rooms too cheaply, employing too many staff to maintain a high level of service and continuing to spend money to attract new customers.

Although this study touches on all of the above, its main focus is on distribution and guest satisfaction. Their importance is highlighted in the following sections. Chapter 2 focusses on distribution and Chapter 3 on guest satisfaction.

1.4   INTRODUCTION TO THE TOURISM DISTRIBUTION CHANNEL

When planning a trip, whether for business or pleasure, clients have a choice of either making use of a travel intermediary, thus benefitting from the intermediary's professional advice, or arranging the trip themselves, which may give them more flexibility in their travel experience.

According to O'Connor and Frew (2002), information is acknowledged to be the lifeblood of tourism. Without information the customer's inspiration and ability to travel is severely restricted. These authors contend that consumers seek out information to reduce the gap between their expectations and their actual travel experience. As a result, the efficient and fast exchange of information has become essential for effective distribution, sales, and customer service in the tourism industry.

Werthner and Ricci (2004) point out that tourism is an information-centred industry and a comprehensive evaluation of its attributes is difficult. Travellers must leave their normal environment to use the product. At the time of making the decision, only an abstract model of the product is available based on information obtained through various media, such as television, brochures, word-of-mouth, or the Web.

Researchers have recognised that images of destinations are shaped and perceptions of risks are abridged as travellers' process information from various sources over time. For these and other communication reasons, destination marketers and travel service providers appear at travel shows and use advertisements, travel brochures and other destination specific literature (Kozak & Kozak 2008).

Martin (2004) contends that travel products have three characteristics - intangibility, perishability and heterogeneity. Travel products are intangible, since they cannot be grasped with any of the five senses, for example, service cannot be seen, tasted, smelled, felt or heard, nor can it be grasped conceptually. Thus, travel products are experienced, rather than possessed.

The second product characteristic is perishability. If a seat on an aeroplane or a room in a hotel is not sold on a particular flight or night, the opportunity to sell it is gone forever. The third product characteristic is heterogeneity, which refers to the involvement of a mixture of heterogeneous business services such as transport, accommodation, restaurant and retailing.

According to Martin (2004), these product characteristics have profound implications for customers, and thus for marketers. Tourism marketers need to showcase their products and convince consumers of an intangible product's quality, strategically optimize profit through yield management as a result of the perishable nature of their products, and coordinate with various business partners across industry sectors to provide a seamless, total tourism product.

Boksberger (2006) claims that risk cannot be completely evaded when buying a tourism service, as it mostly involves a level of doubt. This is because travellers are buying an intangible service, an experience, and the purchased service can only be experienced after the sale has taken place.

According to Buhalis (2000), distribution is one of the most significant elements of tourism marketing, as it determines all other aspects of the marketing mix. Green (2005, 7) points out, "Distribution strategy has quickly become the function in hotel marketing that can have the greatest impact on profitability."

The varied range of services required necessitates a mixture of information and may require several transactions. Resourceful distribution channels can simplify information delivery while their bundling functions can decrease the number of transactions required. Not having a multichannel distribution strategy could mean invisibility for a supplier in the market place, but it needs to be noted that not all intermediaries are suitable for all organizations, as each layer of distribution adds cost and complexity (Buhalis & Kaldis, 2008).

Various companies within the tourism industry, such as transportation, tour operators and hotels, are very reliant on each other due to the interdependent nature of the tourism industry (Evans, Campbell & Stonehouse, 2003). These companies need to work together to create a value chain. If there is a service failure with one provider, it could impact on another and ultimately, on the overall experience of the client, since the client sees this value chain as a seamless product (Yilmaz & Bititci, 2006).

1.4.1 Financial and managerial implications of the distribution channel

Although the following calculation cannot be statistically or financially proven, the researcher uses it on a regular basis to motivate the hotel staff and Mantis' sales and marketing team to diversify the Monarch's market segments.

Distribution channel members receive approximately R310, excluding 14% VAT per room night sold. This is calculated as follows.

Average selling rate of R2000 less 14% VAT, less internal breakfast allocation of R150 = a rate of R1604, minus the actual achieved rate of R1294.

If one assumes that approximately 70% of all bookings are made by distribution channel members, and considers that the hotel achieved 63% occupancy in 2013, almost R600 000 in commissions was paid to distribution channels members in 2013. Of this,approximately R495 000 was paid to or shared with OTAs, since this channel represents roughly 58% of the total business of The Monarch and 83% of distribution channel members' business.

Table 6 summarises the information provided above.

Table 6: Calculation of commissions paid to distribution channel members

Avg selling rate	2 000		Total room nights available	4380
Less VAT @ 14%	-246		Achieved occupancy	63%
Less Breakfast	-150		Total rooms sold	2 759
Avg selling rate including commission	1 604		Bookings via distribution channel members	70%
Less avg rate achieved	-1 294		Rooms via Distribution channel members	1 932
Commission paid or shared	310		Total Commissions paid or shared	599 535
Percentage Internet Room nights	68%			
Percentage room nights booked from own website	15%			
Total OTA percentage of room nights	58%			
Total OTA room nights	1 595			
Total OTA commissions	495 045			

1.5   INTRODUCTION TO GUEST SATISFACTION

Hospitality organisations are in a relatively unique position since they attemp to bridge two worlds – the domestic and the commercial – as they deliver on the service promise (Crick & Spencer, 2011). Crick and Spencer (2011) cite Lashley (2001) who describes this bridging as an attempt by employees to square circles: at the directive of their managers they must balance providing hospitality with being efficient and profitable. According to Crick and Spencer (2011), the delivery of hotel services is qualitatively different from the delivery of other types of services, and this influences the way in which the service is managed, delivered and perceived by the customer.

Pizam and Shani (2009) highlight the distinction between hospitality and hospitableness. They argue that the latter refers to authentic kindness and generosity while the former refers to the creation of experiences. They add that managing the tension between creating the feeling of being at home while

simultaneously trying to create an extraordinary experience is a management challenge, particularly if commercial considerations are also taken into account.

Kandampully (2006) states that due to the modern lifestyle, one of the distinguishing features of the twenty-first century is that the products and services of hospitality firms have to fulfil various customer needs within a social setting of personal interaction. Hotels thus have to be attuned to the changing needs, expectations and values of customers, particularly with regard to personal lifestyle and social interaction; they also need to be aware that the modern-day customer is predominantly service orientated, rather than product orientated. The transformation taking place in the hotel industry, according to Kandampully (2006), is not being generated in accordance with the internal models of the past, but is being triggered by the external changes in customers' lifestyles.

Choi and Chu (2001) postulate that in a competitive industry, such as hospitality which has homogeneous services and attributes, hoteliers must be able to satisfy their customers better than their counterparts. Schiffman and Kanuk (2004) describes customer satisfaction as an individual's perception of the performance of the product or service in relation to his or her expectations.

According to Wilkens, Merrilees and Herington (2007), there are three main dimensions of service quality in hotels, namely, physical product, service experience and quality of food and beverage. These three dimensions are made up of sub-categories. Wilkens, et al. (2007) use the following examples to explain these subcategories.

a) If the lobby of the hotel is run down, but the quality of the rooms and other facilities are kept up to date, the level of satisfaction of the physical product will be affected.

b) If the quality of the food is good, but the service of the waiters is not, the overall level of satisfaction with food and beverage and service experience will be affected.

These authors argue that not only will the run down lobby have a negative impact on the physical product dimension, but it could also have a negative impact on the other two dimensions. Therefore these three dimensions and their sub-categories should be planned as a whole and not separately. Wilkens, et al. (2007) point out that hotel patrons perceive these three dimensions as a whole.

Guzzo and Dominci (2010) note that in the hotel industry the cost of acquiring new customers is higher than the cost of retaining existing ones. Therefore to be successful managers must concentrate on retaining existing customers by implementing effective customer satisfaction and loyalty policies. Buhalis and Law (2008) add that customer satisfaction depends on the accurateness and extensiveness of tourism information and the ability of organisations to react instantly to consumer requests.

According to Torres and Kline (2006), managers face the challenge of establishing and maintaining positive customer relationships on a daily basis. The task is becoming increasingly difficult, as consumers have greater access to information and a wide selection of choice. Price-cutting and promotional campaigns make the task even more difficult, therefore greater interest in customer satisfaction should be shown and the variables monitored on a continuous basis.

Ariffin and Maghzi (2011) found that expectations at hotels are influenced by personal factors such as gender, purpose of stay, nationality and culture. Various studies have addressed the selection criteria that affect customers' choice intentions. Lockyer (2005) identified factors such as location, price, facilities, and cleanliness as having a strong influence on hotel selection. Stringam, Gerdes and Vanleeuwen (2010) added size of guest rooms, staff and breakfast, and Merlo and de Souza Joao (2011) identified that cleanliness, silence and air conditioning are important in the lower priced hotel segment.

1.5.1 Financial and Managerial implications of Guest satisfaction

The financial implications of guest satisfaction are difficult to quantify, but a safe prediction is that good service and a satisfactory guest experience is very important to ensure sustainability and retain customers. From a managerial perspective, guest satisfaction is vital. As noted in the previous section, there are many variables that affect guest satisfaction: some, such as location and the size of guest rooms, are out of the control of the manager, but management can control price, cleanliness and food and beverage.

Management must be cognisant of all these variables, anticipate the needs of their customers and find effective and efficient ways to deliver consistent good service. Management also needs to ensure that the three elements of guest satisfaction, that is, physical product, service experience and food and beverage, work as a whole and not only individually.

1.6   RESEARCH OBJECTIVES

1.6.1 Main research objective

To establish if the information supplied by Online Travel Agents has an impact on guest satisfaction at The Monarch Hotel.

1.6.2 Secondary research objectives

To answer the main research problem, secondary objectives also needed to be addressed.

a) Why does the tourism distribution channel exist and how has it evolved over the years?

b) Why are OTAs becoming so dominant?

c) Is guest satisfaction influenced by the pre-conceived expectation of an individual?

d) Is guest satisfaction one of the key drivers of success at a boutique accommodation establishment?

1.7   OUTLINE OF THE STUDY

Chapter 1 is an introduction to the treatise. It provides the reader with an overview of the research topic.

Chapter 2 is a literature review on the tourism distribution channel and provides the theoretical background to the study. Two issues are addressed in this chapter. The first is the reason for and role of the tourism distribution channel and the second, the various channel members and their evolution.

Chapter 3 is a literature review on guest satisfaction. The issues addressed in this chapter are what is guest satisfaction, why is it important, how is it created and how can it be measured. The researcher also explains how guest satisfaction evolved, the impact people have on guest satisfaction, and how guest satisfaction can be used as a tool for differentiation.

Chapter 4 explains the study's methodology. The issues addressed are the characteristics of research, research design, tools that can be used for research, various research approaches, the approach chosen, planning the study, designing the questionnaire, the pilot study, determining the sample and the response rate.

Chapter 5 summarises the findings from the literature reviews and contains a summary of the interviews conducted.

Chapter 6 provides conclusions, recommendations and discusses possible further research in this field of study.

CHAPTER 2

ROLE AND EVOLUTION OF THE TOURISM DISTRIBUTION CHANNEL

2.1   INTRODUCTION

As noted in Chapter 1, clients have the option of either making their hotel and holiday or business trip arrangements themselves, or booking these via a travel intermediary. Hotels thus have to market and sell their product and services to clients directly, and also to travel intermediaries. According to Buhalis and Law (2008), every tourist is different, and has different motivations, desires and experiences.

Wynne (2000) cites Stern and El-Ansary (1988) who hold that one of the functions of an intermediary is to facilitate the searching process of both buyers and sellers (they are essentially looking for each other). These intermediaries structure the essential information for both parties and provide a place to meet and reduce uncertainty (suppliers are not sure of the needs of customers and the customers are not sure if the suppliers will be able to satisfy their needs). Although Stern and El-Ansary's work is from the late 1980s, their finding is still relevant.

Middleton (1994) highlights that travel and tourism's inability to create physical stock of products adds to rather than reduces the importance of the distribution process. Gartner and Bachri (1994) point out that distribution channels serve as part of the marketing mix that makes products available to consumers. This channel is the link between suppliers of tourism products and their end consumers, and the bridge between supply and demand.

This chapter discusses the role and evolution of the tourism distribution channel. Special emphasis is placed on the impact and role OTAs have on the current distribution solutions available to hotels and their customers.

2.2   OBJECTIVE

The objective of the literature review on the tourism distribution channel was to establish

    a)   Why it was created.

    b)   How the components fit and work together.

    c)   How this channel can be optimized.

    d)   How it has evolved and the reasons for its evolution.

2.3   RESEARCH QUESTIONS

The research questions discussed in the following section are

    a) What is the role of the elements within the tourism distribution channel?

    b) What impact did the Internet have in the evolution of this distribution channel?

2.4   DEFINITION AND FUNCTION OF THE TOURISM DISTRIBUTION CHANNEL

According to Williams and Richter (2002), tourism distribution channels can be classified as direct or indirect. A direct distribution channel occurs when a supplier sells tourism products or services directly to the ultimate customer. The supplier assumes full accountability for promoting, reserving, and supplying services to customers. There are thus no intermediaries involved (Morrison, 2002). An indirect distribution channel occurs when a wide range of intermediaries communicate when selling tourism products and services to customer markets on behalf of tourism suppliers and destinations.

George (2004) compares distribution with the "place" in the marketing mix. Consumers might have heard of a tourism product, but if it is not accessible or available they cannot purchase it. Pearce, Tan and Schott (2004) agree that the structure of the tourism industry distribution system not only affects the choices available to consumers, but also the business models and marketing strategies adopted by the various channel participants. The tourism distribution channel not only focuses on the distribution of tourism products to tourists but also concerns

cooperation and competition issues within the components in the system (Yang, Huang, Song, Liang, 2009).

According to Pearce (2005) in agreement with Alcázar Martínez (2002), distribution's objective is to make the product available to consumers in the quantity needed, at the time required and at the place where they wish to obtain it. Martinez argues that distribution brings time, place, state and possession utility to the consumer, thereby facilitating sales. Pearce (2005) notes that Alcázar Martínez (2002) distinguishes between the characteristics of tourism distribution. According to Martinez, the characteristics include the complementarity of services, the geographical distance between producers and consumers, and strong fluctuations in demand. Complementarity refers to the use of multiple and inter-related services while travelling, such as transport and accommodation.

Buhalis and Laws (2001) explain the function of distribution as follows: the primary tourism distribution functions are supplying information, combining travel arrangement services and establishing mechanisms that enable consumers to make, confirm and pay for reservations. Buhalis (2000) extrapolated the functions of the tourism distribution channel as shown in Table 2.1.

Table 2.1 Functions of the tourism distribution channel

- Identify consumers' needs, requests and expected experiences
- Assemble tourism products from different providers according to customer expectations
- Provide co-ordinated seamless tourism products
- Facilitate the selling process by reserving and issuing travel documents
- Reduce prices by negotiating a pre-purchasing tourism products in bulk
- Ameliorate inventory management by managing demand and supply
- Issue and deliver travel documentation (i.e. ticketing, vouchers, etc.)
- Assess quality facilities and products
- Assist in legal requirements for consumers (e.g. visas) and suppliers
- Facilitate communication between consumers and suppliers especially in multilingual and multicultural environments
- Reduce perceived risk for consumers
- Provide information using leaflets, maps, brochures, video, CDs
- Guide/advise/ consult with consumers
- Undertake pre- and post-experience marketing research
- Facilitate access to often remote tourism products for both bookings and purchasing
- Establish a clearing system where each channel member receives payment for services
- Spread the commercial risk involved between channel members
- Arrange details and ancillary services, such as insurance , visas, currency, etc.

Source:	*Relationships in the Distribution Channel of Tourism: Conflicts Between Hoteliers and Tour Operators in the Mediterranean Region* (Buhalis, 2000)

Pearce (2009) introduced a seven step process to design an effective tourism distribution strategy (shown in Figure 2.1 below).

Figure 2.1:   A Distribution Strategy design process for Tourism
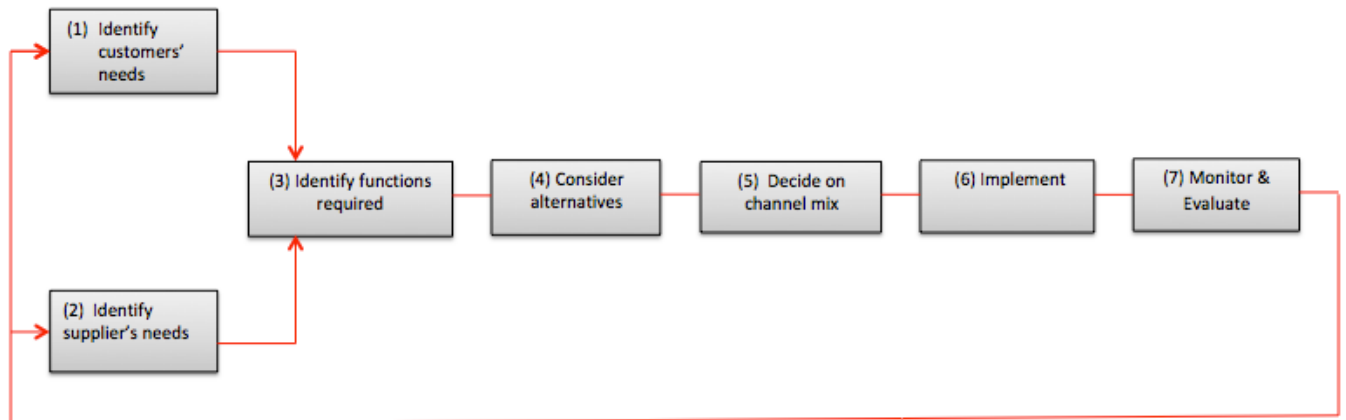
Source: *Channel design for effective tourism distribution strategies* (Pearce, 2009)

According to Pearce (2009), the process must be focused on the customer's distribution needs as well as those of the business. The best possible fit has to be found between the two. Taking a stepwise approach makes the task of developing a strategy easier. Revisiting the strategy also assists to identify changes in the market or the operating environment. As new opportunities or threats appear, new products can be developed and technologies improved.

2.5   TOURISM DISTRIBUTION CHANNELS IN THE PRE-WEB ERA

According to Buhalis and Laws (2001), prior to the adoption of the internet, the travel distribution role was performed by outbound travel agency tour operators and inbound travel agents or handling agencies.

Buhalis and Licata (2002) define the pre-Web era as prior to 1993, and add consumers, retail and corporate travel agents, global distribution systems (GDSs),

switches, destination marketing organizations (DMOs), and suppliers as components of the tourism distribution channel.

Although the pre-Web era was not as multifaceted as the Web distribution environment, the use of multiple distribution channels had taken root. According to George (2004), the tourism distribution channel can be depicted as follows (refer to Figure 2.2 below).

Figure 2.2: The Tourism Distribution channel according to George (2004)

1	2	3	4	5
Tourism Service	Tourism Service	Tourism Service	Tourism Service	Tourism Service
				↑ Inbound Operator/Agent ↑
			↑ Tour Operator	Tour Operator
			↑	↑
	↑ Travel Agent	↑ Tour Operator	Travel Agent	Travel Agent
↑	↑	↑	↑	↑
Consumer	Consumer	Consumer	Consumer	Consumer

Source: *Marketing South African Tourism*, 2nd edition (George, 2004)

Kracht and Wang (2009) presented a more detailed description of the pre-web tourism distribution channel (see Figure 2.3).

Figure 2.3:   Structure of Tourism Distribution Channels: Pre-World-Wide-Web Era (before 1993).
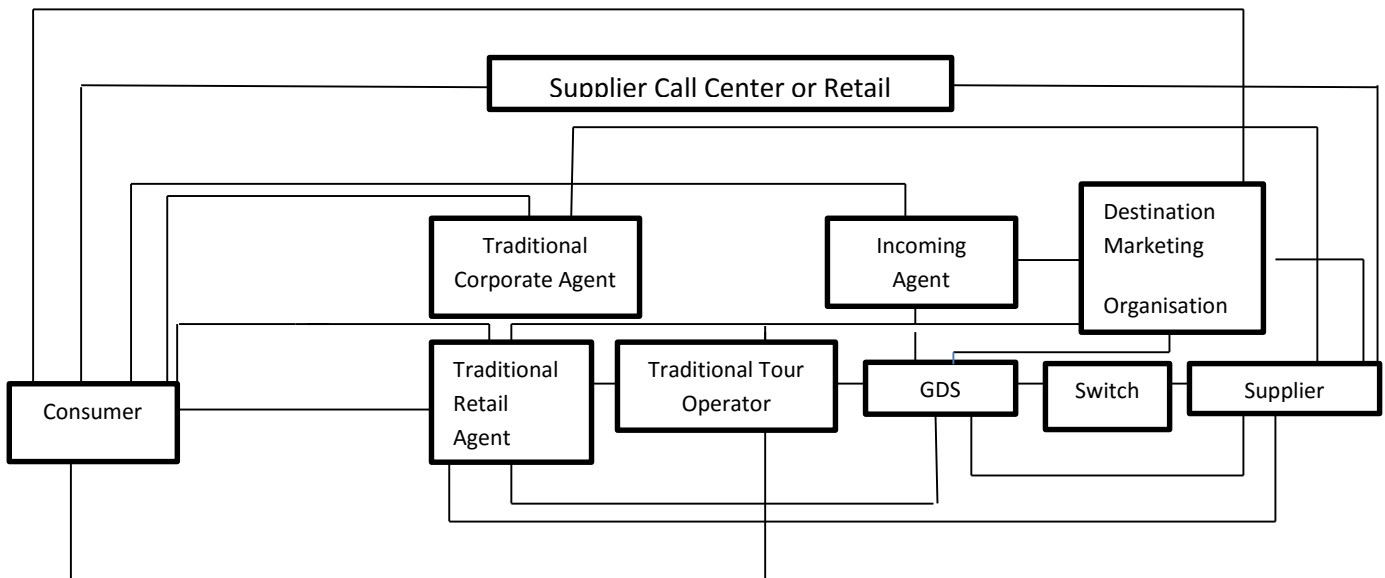
A Travel Agent can be defined as an intermediary who supplies information and sells services to consumers on behalf of principals, such as hotels and airlines, or other intermediaries such as Tour Operators or Tour Brokers (George, 2004). Corporate travel agents, as their name indicates, make bookings on behalf of businesses, and Retail Travel Agents make bookings on behalf of the man on the street.

According to Doane, Hendrick and McAfee (2003), traditional travel agencies remain important for specialized markets such as group tours and complex international itineraries. Gronflaten (2009) includes older people and organized tours. Harris and Duckworth (2005) indicate that travel agents can add value by building connections

with niche tour operators, concentrating on markets where staff have expertise and making use of dynamic packaging technology to put travel components together in a personalized manner. Cheyne, Downes and Legg (2006) believe that travel agents must act as more than mere ticket-reservation officers, and offer more added value to the information and advice they give clients.

Hudson, Snaith, Miller and Hudson (2001) found that booking a more complex trip with multiple layovers might be faster and easier with a traditional agent than online, due to the influence the travel agent has on the consumer's decision making process. Findings from Castillo-Manzano and Lopez-Valpuesta (2010) indicate that the more complex the trip, the greater the chance of a tourist making use of a traditional travel agent. Their findings were consistent with Cheyne, et al. (2006), who suggest that tourists are more willing to make use of the internet when travelling to familiar destinations because they have been there before.

George (2004) describes Tour operators (also known as Tour Wholesalers) as the intermediaries who combine various tourism products, such as hotels, transfers, flight tickets and rental cards, into packages and then either sell them directly to consumers, or via Travel Agents. George goes one step further and suggests that the task of a tour operator is to put together and provide value for money packages that are cheaper than what a consumer could have purchased directly.

According to Werthner and Klein (1999), tour operators implement an aggregating function, combining travel services into packages. Tour operators have also started to engage in vertical integration, becoming suppliers of air travel with charter airlines and owners of retail travel agencies, thus having links on both sides of the chain (Harris and Duckworth 2005).

Incoming travel agents, also referred to as inbounds or ground operators, are another level of traditional intermediation. Inbounds serve as the intermediary between tour operators and suppliers. Tour operators put travel packages together, which are usually handled by incoming travel agencies at the destination (Buhalis and Laws, 2001). March (2000) points out that inbound tour operators do not come into contact with travellers. They arrange the itineraries, assemble the components

of group tours, and book with and pay tourism suppliers on behalf of outbound travel agents located in overseas source markets.

The role of Destination Marketing Organizations (DMOs) is to attract tourists to a specific country, region or city. Examples of these intermediaries are South Africa Tourism, the Eastern Cape Parks Board and Nelson Mandela Bay Tourism. Buhalis (2000) explains that DMOs are used by both tourists and the travel trade for information, support documentation, and co-operation with regard to promotions and special arrangements.

Global Distribution Systems (GDSs) are systems that combine information, reservations and sales and act as an intermediary between principals and travel agents (George, 2004). Travel agents can search for hotels and flights and make bookings, without the need of a tour operator or wholesaler. Buhalis and Licata (2002) note that GDSs started as airline computer reservation systems (CRSs) and are technically electronic intermediaries.

Granados, Kauffman and King (2008) explain that the GDSs had enjoyed substantial influence in an oligopolistic distribution environment until technological developments abridged barriers to entry for alternatives. The four major GDSs that dominate the market are Amadeus, Galileo, Worldspan and Sabre.

Switch companies or Switches provide an interface between the various systems used by hotels and the numerous intermediaries, and facilitate making reservations through several distribution channels (O'Connor, 2000).

2.6   WEB ERA DISTRIBUTION

According to Martin (2004), the internet 'fits' the marketing principles for travel and tourism, since it (a) allows travel suppliers to establish a direct link with customers, (b) removes the unequal barriers between customers and suppliers, (c) facilitates equal competition, and (d) decreases price discrimination opportunities.

Pitt, Berthon and Berthon (1999) identified three macro effects the internet has on distribution activities in the value chain, namely the death of distance, the homogeneity of time, and the irrelevance of location. The internet has thus eliminated the barriers caused by distance, overcome the constraints of human working hours and geographical time zones, and challenges the conventional ideas on physical location. Buhalis and Licata (2002) believe that technology has changed the function of distribution from facilitation and information exchange to a more sophisticated mechanism of adding value and providing service.

Since the advent of the Web, Information Communication Technology (ICT) has considerably changed and altered tourism distribution's structure (Wang & Qualls, 2007). According to Anckar and Walden (2002), prior to the commercial use of the internet, airlines, hotels, and tour operators pursued disintermediation of other channel components with direct sales to customers, including using retail outlets. Although traditional travel agents were useful to hotels, hotels started dis-intermediating travel agents by marketing directly to clients via the Web (Tse, 2003).

According to Pinkerton (2000), search engines appeared in 1993, and were the first to catalogue or index the entire content of web pages. Uniform Resource Locators (URLs), more commonly known as web page addresses, appeared in April 1994. Web technology thus set in motion a structural change that shifted power to a new centre - search engines.

O'Connor (2009) notes that the ranking in search results is crucial for success in electronic commerce: many companies have chosen paid search-result placements with search engines for their web marketing strategy. Search engines offer sponsored links prominently displayed in search engine results. Companies must bid for keywords, and in the USA and UK, they must even bid for those keywords for which they own trademarks.

The rapid development of the internet triggered another trend - the development of major online travel agencies (OTAs), such as Expedia, Travelocity and Orbitz (Venkateshwara & Smith, 2006). OTAs act as global portals supplying convenient travel-shopping facilities to consumers, helping them to gather information about,

and book, all their travel needs on a single website (McIvor, O'Reilly and Ponsonby 2003).

The first OTA was introduced to the distribution channel in 1995, when the Internet Travel Network (ITN) attempted to dis-intermediate traditional travel agents (Chircu and Kauffman, 2000). Sabre, a GDS owner, launched Travelocity in 1996 (Sabre Holdings, 2012), Microsoft launched Expedia in 1996 (Chircu and Kauffman, 1999), and Priceline was launched in 1998. They sold airline tickets using a "demand collection system", that is, by determining consumer demand and communicating this to suppliers (Priceline 2013).

According to Law, Chan and Goh (2007), OTAs use one or more of the following business models.

1. The merchant model.
2. The agency (or commissionable) model.
3. The opaque model.

Using the merchant model, the OTA purchases hotel rooms at a discount and marks them up for sale at a profit. In this model the OTA accepts the risk of unsold inventory and earns revenue when a room is booked. With the agency model, OTAs arrange bookings for inventory held by the hotel, which are made available to the OTAs at agreed-on prices, and for which they receive an agreed-on commission on each transaction.

An OTA using the opaque model (Priceline is an example) has an agreement with a hotel to distribute hotel rooms subject to the hotel's agreement to the offered price. When Priceline accepts a bid from a buyer, the hotel can decline the transaction. If the hotel accepts, Priceline matches buyers' bids with the lowest bid from the seller to maximize Priceline's profits through price differentials. The consumer does not know which hotel he or she is buying or getting, only the cost.

Research by O'Connel and Williams (2005) and supported by findings from Dubrozkes (2006) found that airlines who have spent a lot of money in trying to dis-

intermediate travel agents are now becoming travel agents themselves. Airlines are extending their services from supplying information on flight schedules and ticket sales to complementary services such as rental car and hotel reservations.

According to Schlosser, White and Lloyd (2006), consumers prefer OTAs due to their competitive pricing and their ability to easily compare the prices of different hotels at thousands of destinations worldwide. Carrol (2004) notes that because it is so easy to search online, travel buyers visit multiple websites in search of hotel rooms before buying, and then search again for lower rates. Toh, Dekay and Raven (2011) found that some travel buyers use OTAs to do their search and then call the hotels directly.

O'Connor and Frew (2002) suggest that OTAs have gained favour from suppliers due to their ability to market products globally. Toh, et al. (2011) found that many hoteliers, particularly the smaller ones, see OTAs as a necessary evil and are unhappy to pay between 15% and 30% in commissions compared with only 10% to traditional travel agents.

Pan, Zhang and Law (2012) warn that hoteliers should pay close attention to the way hotels are presented on OTA web pages. Hotels have limited space to persuade and convert visitors. According to these authors, when a given set of search terms is entered, the OTA displays a list of hotels on its search results pages, sorted by popularity, recommendation, price, or brand. One or more pictures, a brief introduction, room rates and location information accompany hotels.

Research by Pan, et al. (2012) found that the more options presented to a customer on an OTA the more price sensitive they become in their evaluation process. They found that consumers increase their list of criteria, such as adding pool and wireless, to reduce the number of options presented. The authors also found that when there are more images presented, customers spend more time on the web pages and are more confident in their evaluation process.

According to Runfola, Rosati and Guercini (2012), there is a relatively new form of distribution emerging within OTAs. These are private sales websites, defined as a community of select customers to whom an online agency offers discounted rates.

Examples are www.groupon.com and www.voyageprive.com. The benefit to customers is the discounted rates; the benefit to suppliers is that they are able to maintain their rate integrity and parity, since these discounted rates are only offered to select customers. Schutze (2008) points out that private sales websites are successful because they offer competitive prices and ad hoc specials, and can also act as an enabler of relationships between consumers and the hotel.

Mayr and Zins (2009) note that although the internet threatens travel agents with dis-intermediation once the customers lose their 'techno fear', there are a significant number of potential travellers without computer literacy and no internet access.

Figure 2.4 below depicts the tourism distribution channel with search engines, websites and online travel agents included (Kracht & Wang, 2009)

Figure 2.4   Structure of Tourism Distribution channels: Online Travel Agents (1995 – 2002)
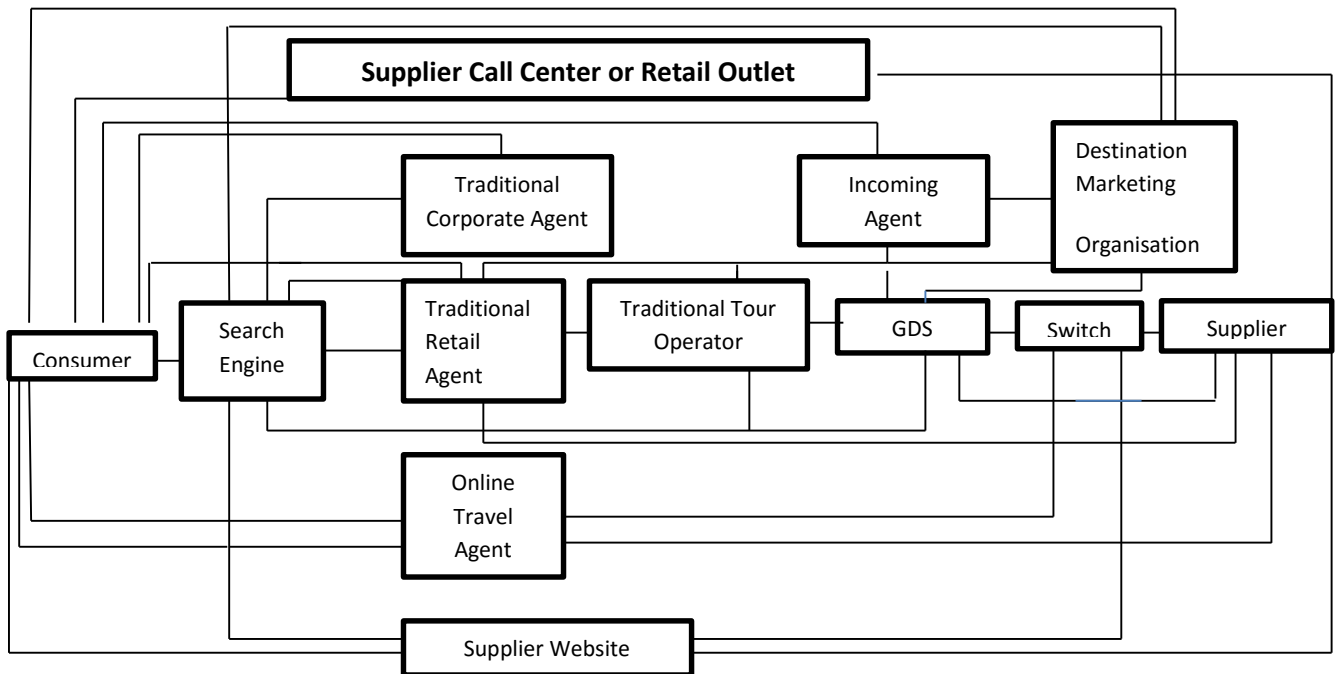
Source: *Examining the tourism distribution channel: evolution and transformation (Kracht and Wang, 2009)*

The advancement and changes in tourism distribution channels resulted in more variation for the consumer, greater competition for distribution participants, and a more complicated industry structure (Granados, et al., 2008). Pearce, et al. (2004) agree that the technology-induced structural changes offer consumers more choices and foster a more fiercely competitive environment to channel participants.

ICT improvements added more complexity to the tourism distribution structure with several permutations. These included introducing additional layers of intermediation, dis-intermediating some components by excluding the traditional intermediaries and facilitating direct interaction between suppliers and consumers, and re-intermediating existing components that incorporated and adapted to new technologies (Buhalis and Law, 2008).

Granados, et al. (2008) explain that a meta-search engine searches the online travel agency sites and supplier sites, thereby adding an additional level of intermediary function. Christodoulidou, Conolly and Brewer (2010) define a travel meta-search engine as a vertical search engine that will take a single query and supply results, and compare travel accommodations and pricing from many sources. However, meta-search engine sites could have their preferences, thus only searching and supplying results from sites that pay them a commission (Vinod, 2009).

Global New Entrants are in fact only new GDS providers, who are attempting to provide the same service as the traditional GDSs at a lower price.

Figure 2.4 depicts the tourism distribution channel from an internet point of view and introduces two new entrants, namely, Meta-Search Engines and GNEs.

Figure 2.4   Structure of Tourism Distribution channels: GDS and Google web
              browser (2005 – 2009)
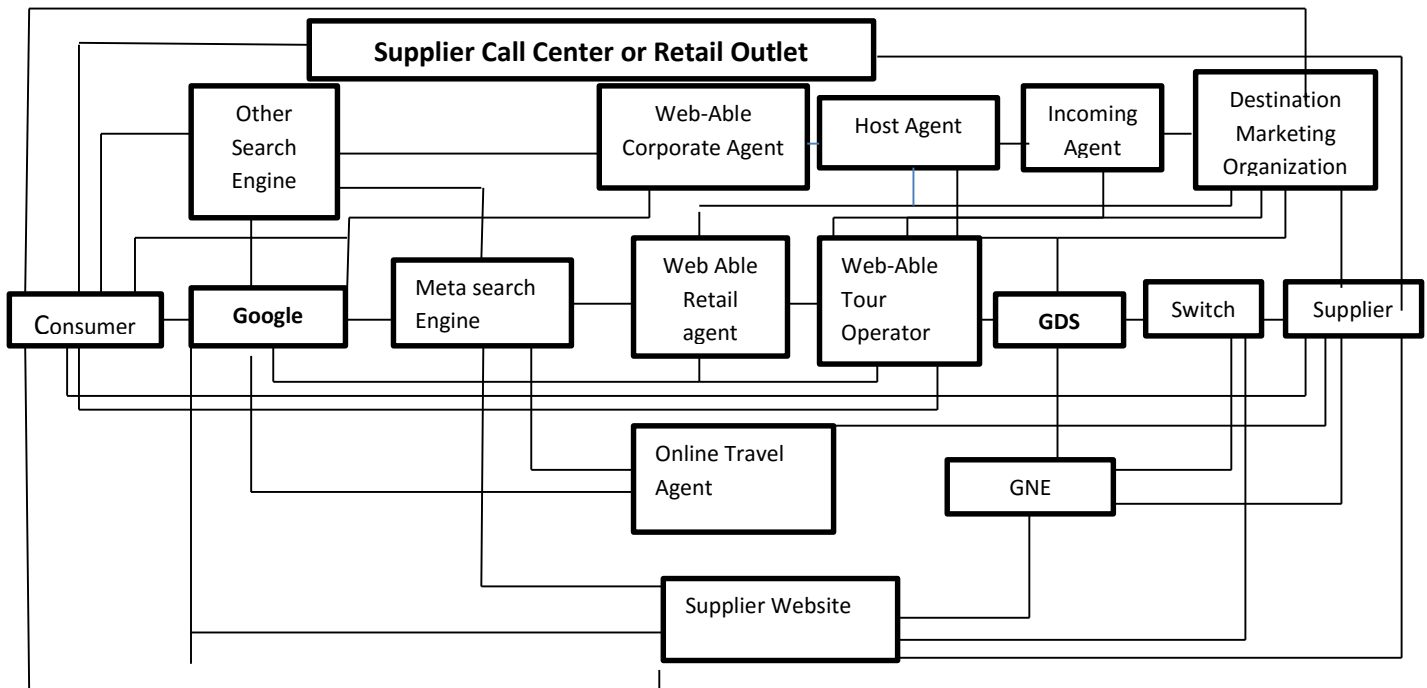
Source: *Examining the tourism distribution channel: evolution and
              transformation (Kracht and Wang, 2009)*

Technology has also introduced some challenges for the consumer. These relate to the distancing of the consumer from human contact. Regarding human interaction and its lack, Grau (cited in Wilkening, 2008) notes that dis-satisfaction with online travel agencies has led to a decrease in online bookings. This is in line with the observations of Meyronin (2004), who noted that consumers could become dissatisfied with internet-based intermediation. Meyronin explains that many non-technophiles favour human interaction and that contact with cybermediaries can cause feelings of helplessness.

According to O'Connor and Frew (2002), from an overall tourism industry point of view, technology, and particularly the internet, has had some negative impacts, such as pricing transparencies and reduced customer loyalty. Carrol and Siguaw (2003) found that the greatest threat to hotels from electronic distribution systems is the risk that consumers could view hotel services as a commodity and base their buying decisions solely on price (similar to what they are doing with airlines).

Cheyne, et al. (2006) indicate that travellers appreciate the following from travel agents - tailored service, building relationships, providing choices that suit the needs of the traveller rather than the need for commissions, having destination expertise, and saving time.

The need for human interaction creates the need for consulting services to adopt an info-mediary role. Dolnicar and Laesser (2007) indicate that for traditional travel agencies to survive, they need to change into info-mediaries. Cheyne, et al. (2006) add that traditional travel agents can add value by consolidating and synthesizing the information on the internet and making it meaningful to their clients.

Jeong, Oh and Gregoire (2003) studied the relationship between online information and behavioural intentions and found that information quality plays an important role in the decision-making process. They concluded that companies have to identify and present information to their clients that will aid purchase decisions. If this information is not present, the customer will become dissatisfied and look to other websites for this information.

Buhalis and Law (2008) determined that consumers increasingly trust peers rather than the content of marketing. As a result, the impact of virtual communities in tourism is gradually growing. O'Connor (2010) suggests that the Internet is evolving from a push marketing platform to one where peer-to-peer data generation and sharing are the norm. O'Reilly (2005) calls peer-to-peer marketing 'user generated content' (UGC), and 'peer-to-peer applications', Web 2.0.

2.7   WEB 2.0

According to Turban, et al. (2008), Web 2.0 refers to the second-generation of internet-based services that allow people to collaborate and share information online in new ways, such as social networking sites, blogs, wikis and communication tools. According to Allen (2008), Web 2.0 refers to behaviours, technologies and ideals. It fosters a new kind of media consumer who is more engaged and actively involved in creating and adding value to the content on the internet.

Bjork and Kauppinen-Rasanes (2012) point out that the internet has become a smart way for tourists to search for information and also engage in online conversations. Knowledge is transferred via customer-to-customer communication (YouTube.com, Facebook, MySpace.com and Twitter), and the consumer generated content found on travel sites like TravelPod, Travel-Blog and TripAdvisor, is used to get hints, advice and recommendations, and of course, to share one's own experiences.

Mckee (2003) states that tourists first rely on word-of-mouth to form their own impressions of a destination: they also share their destination image via the internet, since they report exciting incidents. Xiang and Gretzel (2010) agree that online communities and travel sites are major providers of destination information. Sarks (2007) mentions a study undertaken by Compete Inc. that found that UGC has generated roughly $10 billion per annum in online travel bookings, and that over 20% of consumers rely on UGC when planning their trips.

Although Litvin, Goldsmith and Pan (2008) do not categorically state that some of the word-of-mouth marketing on the internet (otherwise known as electronic word-of-mouth, or eWOM) could be fake, they refer to the possibility that employers could ask staff to either write positive comments about the company they work for, or post negative comments of their competition on the internet. Litvin, et al. (2008) add that electronic intermediaries such as OTAs have overcome the lack of face-to-face human interaction traditional travel agents provide by offering web pages that feature customer reviews of the products they distribute.

Gretzel's (2007) research on TripAdvisor revealed that 61% of respondents believed that travellers' reviews are a more dependable source of information than that received from traditional travel agents. Earlier work by Bickart and Schindler (2001) into electronic word-of-mouth also indicated that consumers value reviews and recommendations written by fellow consumers more than those written by experts. Schmallegger and Carson (2008) believe that the recent growth in the electronic word-of-mouth phenomenon is an indicator of the perceived sincerity and impartiality of the views of fellow consumers compared with traditional tourist information sources.

Litvin, et al. (2008) argue that traveller review forums are increasingly appearing alongside online travel agency websites because the trust that was traditionally placed in the local travel agent is not easily simulated on faceless electronic travel websites. By encompassing consumer reviews, internet travel websites attempt to harness the assurance and trust inherent in word-of-mouth communication.

Yacouel and Fleischer (2012) claim that consumers find it hard to trust information appearing on hotels' or tourists' sites, since anyone can write a review on these sites. On the other hand, OTAs provide prospective guests with a reliable channel through which to track hoteliers' past service quality. Yacouel and Fleischer (2012) claim that the main role of a cyber-mediary is to provide experienced buyers reliable information regarding sellers' past performances. They suggest that OTAs are a more reliable source of information because OTAs only publish reviews of guests who actually booked a room or service through them.

Research by Vermeulen and Seegers (2009) found that exposure to an online hotel review improves the average probability that consumers will consider booking a room in the reviewed hotel; for lesser known hotels this effect is stronger. According to Starkov and Price (2007), a European hotel and restaurant industry survey revealed that 80% of United Kingdom consumers do online research before booking accommodation. Half of the respondents indicated that they refrained from booking a hotel as a direct result of a negative review on websites such as TripAdvisor. Interestingly, Gretzel, Fesenmaier and Lee (2010) found that only 13% of users who have used online travel websites have posted their own reviews.

Stringam, Gerdes and Vanleeuwen (2010) identified four main aspects in guest reviews on internet travel sites, namely, hotel service, hotel condition, room cleanliness and room comfort. These authors established that hotel service and room comfort received the highest ratings associated with willingness to endorse. According to Lee and Romaniuk (2009), consumers are more motivated to share their experiences of a product when their expectations have been exceeded, or not realised at all. Moe, Schweidel and Trusov (2011) support Lee and Romaniuk, since they found that reviewers share their extreme experiences more.

Ranabser and Ricci (2005) reason that there is a higher perceived credibility of opinions expressed in UGC compared with traditional tourism information sources, because tourism products need to be consumed before an evaluation can take place. Litvin, et al. (2008) believe that UGC is growing in importance because it is perceived as an independent message source.

Farhoomad and Drury (2002) note that the information overload on the internet has led to decreased efficiency in searching for information. Susskind, Binn and Dev (2003) agree that the recent surge of internet use has resulted in overwhelming volumes of information, some of which is inaccurate or misleading. Lurie (2004) points out that the increased number of alternatives, or attributes increases uncertainty and risk in consumer choice. And Frias, Rodriguez and Casaneda (2008) consider the entire internet as negatively affecting destination image because of information overload.

2.8   CONFLICT IN THE DISTRIBUTION CHANNEL

Buhalis (2000) draws attention to a variety of conflicts in the tourism distribution channel. Tour operators and other middlemen attempt to increase their profitability by growing their market share and volume. They do so by offering cheaper priced holiday packages, whereas hotels have to balance the volume of clients they serve with their average room rates to maximise their yield and achieve a reasonable return on investment.

Most of the conflicts in the tourism distribution channel emerge from four major sources:

a)   The price and profit margin generate inter-channel conflict. Tourists have a certain budget for their holiday and therefore channel members compete directly with their partners for a larger share.

b) The growing vertical integration generates oligopolistic behaviour, which diminishes the negotiation power of smaller or independent channel partners and threatens their competitiveness.

c) Operational issues generate conflict as partners often fail to fulfil their responsibilities and/or provide the service they pledged.

d) Bankruptcies, mergers and take-overs are not unusual in the tourism distribution channel; thus the limited financial commitments and assets required by travel intermediaries make this industry extremely volatile.

Regarding the conflict between Hoteliers and Tour Operators in the Mediterranean, Buhalis (2000) found that the stronger the competitive position of a hotel, the less problems it encountered with tour operators, owing to a more equal dissemination of power within the channel. Small, unsophisticated hotels, which lack a wide range of required facilities, tend to face more occupancy and profit margin challenges.

Therefore, hotels need to assess their strategic position, and identify value propositions to enable them to differentiate their product and attract and satisfy niche markets. Kang, Brewer and Baloglu (2007) assert that suppliers need to establish which channels are the most effective in driving revenue to the property, and also anticipate which channels will be the most popular.

2.9   LOYALTY AS A FORM OF DISTRIBUTION

Loyalty and loyalty programmes continually surfaced in the literature reviewed. Fyall, Callod and Edwards (2003) highlight that there is a large portion of customers who choose to repeat their holiday destination, showing a certain degree of loyalty. They indicate five factors that influence repetition of the same holiday.

a) the desire to reduce the risk of making a mistake when choosing an alternative destination,
b) the chance to meet the same people again,
c) emotional affection for a specific place,
d) the possibility to explore the destination better,

e) the desire to show the destination to other people.

Customer loyalty is often created through a positive experience during a customer's stay at a hotel (Mason, Tideswell and Roberts, 2006). It is, however, important to note that from an airline perspective it has been found that non-loyal consumers first visit OTA platforms, which aggregate airfare information from various airlines (Smith and Rupp, 2004). Research by Barsky and Nash (2006) revealed that the influence of loyalty programmes on guests' decisions concerning where to stay increased from 32% to 34%.

2.10 CONCLUSION

Comprehensive findings on the tourism distribution channel will be discussed in chapter 5. Findings from Kracht and Wang (2009) however provide a very short, but comprehensive summary; although the Web has changed the tourism distribution dramatically, the underlying theory has remained the same. Human interaction, adding value, consumer trust, and branding remain important for all channel participants. Suppliers and intermediaries should not abandon all human interaction in an attempt to save costs with technology. As new technology appears, participants should be prepared for additional forms of intermediation.

Chapter 3 will explore the factors determining guest satisfaction and how guest satisfaction can be measured.

Chapter 3

Guest Satisfaction

3.1   INTRODUCTION

Similar to the distribution channel, guest satisfaction and expectations have also evolved over the years. Kandampully (2006) emphasises that due to the modern lifestyle, hospitality firms' products and services have to fulfil various needs and expectations of customers who have become more service orientated. These needs and expectations are being triggered by the external changes in customers' lifestyles and no longer by the internal models of the past. Defining and delivering guest satisfaction and measuring it has thus become more complicated.

Kotler (2000) notes that customer service refers to the processes and actions that make it easier for customers to do business with a company. Susskind, et al. (2003) claim that service quality is essentially an exchange of human actions and behaviour, and Kandumpully (2006) adds that service quality could be the fundamental that demonstrates a firm's promises to its customers.

Service failures in the hotel industry are inevitable owing to the high 'people factor': this can accelerate customer dissatisfaction with the service provider and potentially lead to customer complaints (Susskind 2002). Hotel guests who are dissatisfied with the service they receive, are likely to show the following reactions:

- Exit silently,
- Spread negative word-of mouth (WOM),
- Voice their complaints to hotel staff or management and
- Continue to patronage the same property despite their dissatisfaction (Karande, Magnini & Tam, 2007).

Zeithaml and Bitner (2003) define service recovery as the actions taken by a business in response to service failure, and state that service failure often comes about when the customer's perceived service quality is below expectation. Swanson and Kelley (2001) found that the behavioural intentions of guests are more favourable when customers believe that a hotel consistently implements service recovery when failures occur.

3.2   OBJECTIVE

The literature review on guest satisfaction was to establish

a) How guest satisfaction is different from service quality.
b) How guest satisfaction is created.
c) Why guest satisfaction has a competitive advantage for a hotel.
d) How guest satisfaction can be measured.

3.3   RESEARCH QUESTIONS

The research questions to be addressed in the following section are

a) What is guest satisfaction?
b) What influences guest satisfaction?
c) What are the benefits of guest satisfaction?
d) How can guest satisfaction be measured?

3.4   SERVICE QUALITY AS A TOOL FOR DIFFERENTIATION

According to Kandampully and Suhartanto (2000), it has become imperative for hotels to gain a competitive advantage due to the ever growing volume and pace of competition. Competition provides increased choice, greater value for money and augmented levels of service to the customer, since there is little to distinguish one hotel's products and services from another.

To differentiate their hotel from another, hotel managers commonly use two strategies: reduce the rate or provide more benefits. Reducing the rate has an impact on the medium and long term profitability. Thus quality of service has become key to the ability of a hotel to differentiate itself.

According to Douglas and Connor (2003), consumers, in general, regard the tangible product as largely undifferentiated, but insist that the intangible elements of service delivery and quality should differentiate the product offering. However, these authors warn that if the tangible elements are below expectation this can have a knock-on effect on the intangible elements.

Barsky and Nash (2003) hold that enterprises which are able to speedily understand and satisfy customers' needs, make greater profits than those who fail to understand and satisfy them. According to Rong, Vu and Law (2012), a thorough understanding of the behaviour and preferences of travellers can assist tourism managers in strategic planning and decision making.

To differentiate their goods and services from the sea of look-alike competitors, companies have to mass customize rather than mass produce their offerings to make them more relevant to the wants and needs of customers (Pine & Gilmore, 2000). Pine and Gilmore (2000) argue that to compete in an increasingly commoditized world, companies have to move beyond supplying goods and services, to selling experiences. By customizing a service it is turned into an experience (Pine & Gilmore, 2000). These authors reason that to enable companies to find out what their customers want, customer feedback forms should not only be focusing on "How are we doing?, but also on "What can we do for you?".

Most customer satisfaction measures essentially focus on understanding and managing what companies already do, rather than ascertaining what their customers really want. Min, Min and Chung (2002) point out that it is imperative for hotels to tailor their services to the changing needs and lifestyles of customers to increase loyalty and retention.

Expectations relate to the perceived level of service that consumers anticipate receiving from a hotel (Torres & Kline, 2006). When the customer reaches the evaluation phase, the level of service obtained is compared with the level expected. From this analysis the customer will emerge satisfied or dissatisfied. Gillbert (2006) emphasises that customers' expectations are derived from the accumulation of service contacts provided to them on a daily basis, and they thus accrue a generalized service expectation, or standard, which they then use to evaluate service quality.

3.5   DEFINING CUSTOMER SATISFACTION

Kwortnik (2005) states that service quality is the gap between perceived service delivered and expected service. Service quality cannot be objectively measured according to some technical standards, but is subjectively felt by customers and measured relative to their pre-determined standards. Kotler (2000) defines satisfaction as a person's feelings, positive or negative, resulting from comparing a product's perceived performance in relation to expectations.

Brady and Robertson (2001) reason that since service quality is a cognitive evaluation, positive service quality perception can lead to satisfaction; thus service quality is an antecedent to satisfaction. Mills, Rudd and Flanegin (n.d.) emphasise that customer service and customer satisfaction are not interchangeable terms. They argue that service is what the hospitality business provides and what the customer receives, while satisfaction is the customer's evaluation of the level of service received. The level of satisfaction is determined by comparing the expected service with the delivered service.

Singh (2006) is convinced that organizations should delve into the expected desires of their customers to earn profit, and Sutanto (2009) argues that this is particularly true when a competitive edge becomes a concern. Torres and Kline (2006) note that customer satisfaction has a direct and positive impact on the viability of a hospitality business. Valdani (2009) points out that businesses exist because they have customers to serve. McCain, Jang and Hu (2005) found that management and

employees can increase customer loyalty by proving their competence and by delivering what they promised.

Pine and Gilmore (2000) cite Clayton Collins (1996) who quotes David Power, the Managing Director of J.D. Power and Associates, as stating that they measure the difference between what a customer expects and what they perceive to have received. The authors then paraphrase this statement by using an equation:

Customer satisfaction = (What a customer expects to get minus what a customer perceives he gets)

Pine and Gilmore (2000) define the sacrifice customers make as the gap between what the customer really wants, less what the customer settles for, that is,

Customer sacrifice = (What a customer wants exactly minus what a customer settles for)

According to these authors, only once a business understands the sacrifice a customer makes, can customization take place. They argue that the more features are bundled together, the greater the likelihood of introducing some component that disqualifies the offering with a particular buyer (either because s/he does not want the feature or does not want to incur the perceived higher price for a marginal element).

Pine and Gilmore (2000) use the following examples to elucidate their theory.

> The cost of furnishing hotel rooms with an iron and ironing board, that frequently do not get used; cans of soda or packets of pretzels on an aeroplane that do not get consumed. In both cases the price was adjusted to cover the cost.

> A passenger on a plane asking for a Pepsi, and being offered a Coke which he accepts, or declines, since there is no Pepsi on board – in both cases the customer makes a sacrifice.

Pine and Gilmore (2000) add that companies condition their customers. This occurs when a business coerces clients to adapt their expectations to the service dimensions, or product features of the services or goods a company sells. Conditioning focuses a company on internal costs and not customer needs, which inevitably leads to customer sacrifice. The authors acknowledge that the company could also be sacrificing revenue opportunities, since clients could simply stop using the company's services or goods if they do not get exactly what they want.

Pine and Gilmore (2000) again use the example of Coke and Pepsi to explain conditioning.

> After using the airline three or four times, the passenger eventually stops asking for Pepsi and start asking for Coke, as he or she knows that Pepsi is not available.

Guest or customer satisfaction is a subjective evaluation by the consumer based on the expectations created by the firm and perceptions of the services received created by past experiences.

3.6   SATISFACTION AS A TOOL FOR LOYALTY

Guzzo and Dominici (2010) had similar findings to those of earlier research by Kotler and Armstrong (2001): they conclude that companies are realizing that losing a customer means losing more than a single sale; it means losing the entire stream of purchases that the customer would have made over a lifetime of purchase. Lee, Lee and Feick (2006) point out that a satisfied guest promotes positive word-of-mouth with superior effect and credibility than conventional advertising at no cost to the enterprise.

On the other hand, Kandampully and Suhartanto (2000) emphasise that satisfying guests is not enough, since there is no guarantee that satisfied customers will return to purchase. According to these authors, loyalty has become more important than customer satisfaction. A loyal customer is a customer who repurchases from the

same service provider whenever possible, recommends the service provider and maintains a positive attitude towards the service provider.

Skogland and Siqauw (2004) define loyalty as a deeply held commitment to repurchase or patronize a preferred product or service in the future, despite situational influences and marketing efforts that could cause switching behaviour. These authors add that guest satisfaction does not have as substantive an effect on loyalty as what was previously assumed.

Earlier work by McIlroy and Barnett (2000) found that satisfaction measures how well a customer's expectations have been met, while customer loyalty refers to the likelihood of a customer repurchasing and engaging in relationship activities. According to these authors, loyalty is vulnerable; customers will continue to defect even if they are satisfied if they believe they can get better value, convenience or quality somewhere else. The authors cite Shoemaker and Lewis (1999) who postulated that satisfaction can exist without loyalty, but it is hard to have loyalty without satisfaction. Dube, Renaghan and Miller (1994) state that there is no guarantee that a satisfied customer will return, but it is almost certain that a dissatisfied customer will not return.

The assumption that customers will remain loyal with minimal effort on management's part to maintain and nurture that loyalty, is no longer true (Douglas & Conner, 2003). These authors reason that consumers have developed a heightened perception of quality and become more demanding, and that their natural inclination is to use services that meet their wants and desires at a particular moment. The authors add that due to the interactive nature of the service process, the customer measures the quality of service immediately, based on memories of previous experiences of similar service. Service is thus unique and personal to a customer at a specific point in time.

Torres and Kline (2006) explain the guest satisfaction and loyalty relationship slightly differently.

They believe that if a client is dissatisfied with Hotel A or Brand X, there is no risk to the client in choosing Hotel B or Brand Y the next time they travel, as he or she has nothing to lose.

However, if the client is satisfied with Hotel A or Brand X there is a risk in choosing Hotel B or Brand Y, as this alternative hotel or brand must be able to deliver a comparable experience.

If the client is delighted with Hotel A or Brand X, the risk associated with switching to Hotel B or Brand Y is very high, as the client will expect these alternatives to meet and exceed their expectations, which have been created or increased by Hotel A or Brand X. In this case, the client will experience some uncertainty and hesitate when faced with other choices.

Delight is defined in the following section: in the context of the above discussion, it can be assumed that it means that expectations have been exceeded.

3.7 EXCEEDING EXPECTATIONS AND DELIVERING CUSTOMER DELIGHT

Pine and Gilmore (2000) suggest that companies should aim for customer surprise. Surprise can be understood as the difference between what the client expected to receive and what was actually experienced. In other words, instead of only meeting expectations or setting new ones, companies should aim to transcend expectations by going in new directions. Pine and Gilmore explain that surprise does not refer to exceeding expectations, nor to uncovering new dimensions to compete with. Rather, it is delivering the unexpected. In equation form, they present customer surprise as follows:

Customer surprise = (What a customer get to perceive – What a customer expects to get)

Pine and Gilmore (2000) are adamant that to be able to deliver customer surprise, customer satisfaction must be present and minimal customer sacrifice. They emphasise that companies should move beyond "How did we do?" and "What do you want?" to "What do you remember?"

Kumar, Olshavsky and King (2001) found that traditionally delight was thought of as a blend of joy and surprise. They suggest that guests can be delighted without being surprised, and that although joy remains an important part of delight, a greater number of delighted customers are exhilarated, thrilled and to a lesser extent exuberant. Berman (2005) explains that delight is different from satisfaction, since guest delight is a positive emotional response to surprising product attributes or service encounters; delight thus provides unexpected value and creates memorable experiences.

Torres and Kline (2006) point out that customer satisfaction entails delivering on expectations, whereas customer delight requires exceeding expectations. They add that satisfied customers are not excited with a firm, but merely at ease. Torres and Kline cite Keinningham, Goddard, Vavra and Laci (1999) who proposed that customers have a range of satisfaction - the "zone of tolerance": when firms go beyond the upper threshold of this zone, customers will be delighted.

Parasuraman (2004) describes the "zone of tolerance" as follows: Customers do not have a single ideal level of service, but rather a range of expectations, bounded by desired service at the top and adequate service at the bottom. If the service received falls within this zone, clients will be satisfied.

Torres and Kline (2006) quote Paul (2000) who states, "Unfortunately, people don't talk about adequate service. Instead, they tell anyone who will listen about really bad or really delightful services." Torres and Kline (2006) believe that delightful service cannot be replicated by competitors as easily as, for example, remodelling a hotel, updating technology to meet the latest trends, or dropping prices to stimulate demand. Mohsin and Lockyer (2010) agree that service makes the difference, since most luxury hotels can easily compete with physical evidence and comforts.

Torres and Kline (2006) proposed the model below (see Figure 3.1) for customer delight.

Figure 3.1   A model for hotel customer delight

Customers

| Expectations are met | Exceed Expectations |

Expectations are met

Security and justice needs fulfilled (prevents outrage)

Customers

Exceed Expectations

Esteem needs fulfilled

Not Dissatisfied

Capable and competent

Satisfied Customers → Very Satisfied → Delighted Customers

Satisfied and motivated

Committed

Capable & Competent

Adequate facilities

Functional Culture

Services Comparable to

Loyalty continuum

Not Loyal   Somewhat loyal   Loyal

Profit continuum

Average profitability   Above Average profitability

Culture fosters delight

Competitive advantage is exceptional service

Unexpected actions

Source: *From Satisfaction to delight, a model for the hotel industry (Torres and Kline, 2006)*

In Figure 3.1 (above), the left side signifies customer satisfaction and the right side, customer delight, and in between lies an area called 'very satisfied'. The customer thus moves from being satisfied to being very satisfied to being delighted. According to Torres and Kline (2006), there are three factors that need to be fulfilled to ensure guest satisfaction:

1. The guest's expectations need to be met.
2. The organisation's employees must be capable and competent, and not dissatisfied.
3. The facilities must be adequate, a culture of doing things right must be present, and the hotel's service must be comparable or similar to other competitors.

Torres and Kline emphasise that for or a hotel to delight its customers,

1. Guest expectations must be exceeded by delivering beyond expectations; in addition, guests' self-esteem must be enhanced – guests must feel better about having stayed at the hotel.
2. Employees must be capable and competent, and also satisfied, committed and motivated.
3. Instead of only doing things right, the organization's culture must focus on delighting the customer, believe that customer service is a competitive advantage and do the unexpected in a positive way.

Torres and Kline (2006) conclude that,

1. Customer delight can only be achieved by a coordinated organizational effort.
2. By raising the service bar, hotel managers need to be cognisant that their customers will then have heightened expectations, thus the increased service levels must be delivered consistently.
3. Delivering delight requires greater understanding of the needs and behaviours of customers.
4. Instead of selling and offering good service, managers should attempt to visualize a guest's experience as satisfying a certain higher order of needs, and thus offer a pleasurable experience.
5. Employees must be motivated by and focused on excellent customer service as they convey the service and maintain the product that directly impacts the guests' experience.

3.8   EXPECTATIONS OF CUSTOMERS

The physical and service qualities of a hotel have an impact on customer satisfaction (Ekinci, Dawes & Massey, 2008). Research by Wilkins, Merrilees and Herington (2007) established that there are three main types of service quality in hotels, which are grouped as follows - physical product, service experience and quality of food and beverage. Since these three factors matter to consumers, the authors believe that hotel managers should integrate their operations to optimise the delivery of services.

Wilkens, et al. (2007) point out that hotel guests do not see service quality as the sum of lots of pieces of a pie; they see the pie as a whole. Therefore an improvement in just one factor, such as speedy service, might not be noticed because it is buried in the composite big picture.

Hartline, Woolridge and Jones (2003) classify the performance of different employee groups in hotels as necessary, desirable or neutral. Their research established that the performance of front desk personnel is necessary to ensure good perceptions of quality. They found that the performance of housekeeping and parking are desirable, while the performance of room service and bell staff are neutral.

Earlier research by Kandampully and Suhartanto (2000) supports that of Hartline, et al. (2003): not all the operations of a hotel are equally important and the ability and willingness of housekeeping staff to offer superior service are important to create loyalty. Kandampully and Suhartanto (2000) suggest that housekeeping is important because it is a core benefit, while reception, food and beverage, and price are supporting factors.

Mohsin and Lockyer (2010) note that guests use a variety of attributes to judge the quality of the service they receive at a hotel: some of these factors are related to intangible service elements, some are related to tangible physical elements, and others, such as "value for money", are more complex to define. The intangible elements are service related – customer service, understanding and caring hotel management and the convenience of dealing with transactions while staying at the hotel. This also includes the service received at the hotel restaurant. The tangible

elements are related to the physical facilities – the availability, cleanliness and quality of various facilities in the room and in the entire hotel.

Business guests rate cleanliness and location as important attributes when choosing a hotel whilst leisure guests viewed security, personal interaction, and room rate as prime attributes in their hotel selection (Yavas & Babakus, 2005). The authors found that both the segments seem to provide highest importance to the availability of general amenities.

The next ranked attributes varied across the two segments. While business guests prefer convenience, core service, room amenities and ambiance in the same order the order of preference of leisure guests was core service, convenience, ambiance, and room amenities. Kashyap and Bojanic (2000) found that the quality of the rooms was not as significant for leisure guests as it was in explaining ratings and intention to revisit for business guests.

Verma, Stock and McCarthy (2012) report that the search patterns of leisure and business travellers are also different. Business travellers rely on the recommendations of the company or organisation, whereas leisure travellers rely on the recommendations of friends and family and extensive searches on the internet. According to these authors, this difference in search patterns echoes the difference between the two categories of guests in evaluating attributes when choosing a hotel.

Although hotels belonging to a chain are expected to provide a higher level of service quality than independent hotels, customer service ratings of friendliness, standard, personal service and tangibles does not differ significantly between hotels belonging to a chain and independent hotels (Briggs, Sutherland & Drummond, 2007). Kandampully and Suhartanto (2000) point out that the performance of one hotel in a chain may influence a consumer's perception of other hotels in the same chain. Therefore it is important to maintain service standard consistency in all hotels in the same chain; it is equally important that a chain hotel maintains its individuality, since customers also value personalised service and consistency.

Lee, Barker and Kandampully (2003) established that for many business customers, hotels are a travelling office, and technology is important to enable hotels to offer new and enhanced services to clients. Their research revealed that 76% of hotel general managers believe that technology contributes to uplifting hotel image, and 72% of these managers believe that technology enhances service quality.

Bitner (1992, cited in Kincaid, Baloglu, Mao & Busser, 2010)) coined the term "servicescape" to signify the physical elements of the service setting. Bitner postulated that the "servicescape" is made up of three tangible factors that influence the customers' perception of quality resulting in their level of satisfaction and repurchase behaviours. These factors are

Ambient conditions:	e.g. temperature, noise, odours
Spatial layout and functionality:	e.g. arrangement of furnishings and their relationship to customer and employee needs
Signs, symbols and artefacts:	e.g. signage and decor that facilitates the desired image or mood.

3.9 MEASURING SERVICE QUALITY AND GUEST SATISFACTION IN THE HOTEL INDUSTRY

Guillet and Law (2010) believe that there is no standardized hotel rating system in the world, since there is no "one size fits all" measurement tool to measure the value of a hotel, its amenities and its potential to satisfy customers. Their research found that hotel service quality is highly subjective and varies according to individual preference.

Guillet and Law (2010) point out that central and local governments, hotel organizations and associations, guide books, travel websites, etcetera, assign their ratings according to their own criteria and thus the same hotel could receive different ratings and rankings from different organizations. This confuses consumers, and could also could make them conclude that hotel ratings and rankings are arbitrary and not to be trusted.

The measurement tools used in hotels are commonly called Guest Satisfaction Questionnaires (GSQs). Poria (2004) notes that the guests who complete these surveys are not a representative sample: the surveys are completed by those guests who are most satisfied, or dissatisfied, and are often unreliable and statistically invalid.

During Poria's interviews of hotel employees, it was established that employees sometimes destroy or 'fake' GSQs if they are reprimanded or rewarded for the negative or positive feedback received from these surveys. Poria concludes that GSQs fail to fully reflect guests' opinions, and adds that this is not simply because guests do so voluntarily, as previous researchers found, but because there is intervention by staff.

Marinescu and Ispas (2012) refer to Parasuraman, Zeithaml and Berry's (1985) "ServQual" model that measures Service Quality on a scale. The model consists of 22 questions, half of which are based on customers' expectations and the other half on customers' perceptions of the services consumed. The researchers thus found that there is a relationship between expectation and perception.

Juwaheer (2004) points out that Parasuraman, et al. (1985) define and conceptualise service quality as a form of attitude, as a result of comparing customers' expectations with their perceptions of performance. The "ServQual" model measures the gap between customers' expectations and their perceptions of actual performance. Service quality can neither be conceptualised nor evaluated using traditional methods that measure the quality of goods, because services possess three characteristics: intangibility, heterogeneity and inseparability that physical goods do not have. Douglas and Connor (2003) point out that Parasuraman, et al. (1985) believed that only customers can measure service quality, and that service is of high quality when it surpasses consumers' expectations.

The "ServQual" model is based on five dimensions that Parasuraman, et al. (1985) identified that customers use to evaluate service quality. The authors aim to indicate the difference between the expectations and perceptions of customers in these dimensions.

Material assets: The appearance of equipment, personnel and communication
                       materials.

Reliability: The ability to perform the promised service safely and
                       accurately.

Responsiveness: Willingness to help customers and provide prompt services.

Safety: The knowledge and courtesy of employees and their ability to
                       instil a sense of trust and safety.

Empathy: The care and individualized attention that the service
                       organization provides to its customers.

According to Akbar, Som, Wadood and Alzaidiyeen (2010), Parasuraman, et al, (1985) updated and modified their "ServQual" model and developed two sets of scales to measure service qualitly.   The "Servqual" model still retained its 22 questions, but now only has 4 four dimensions, namely, efficiency, system availability, fulfilment and privacy. The second model, a subset of the "ServQual" model, they introduced is called "RecS-Qual", Recovering Service Quality, consistsing of 11 questions and measuresing 3 three dimensions namely - responsiveness, compensation and contact.

Akbar, et al. (2010) explain that Parasuraman, et al. developed the additional model because the "ServQual" model did not explain how organizations deal with service failures, nor how to turn dis-satisfied customers into loyal customers. The "RecS-Qual" model provides service failure solutions to improve customer satisfaction. Robbins and Miller (2004) found that when service recovery is handled well it affects customer loyalty.

Research by Akbar, et al., (2010) reveals that

a) Although the quality of a hotel's service recovery may not have a direct influence on customer satisfaction, it could have an indirect effect on customer satisfaction.

b) To retain loyal customers, service quality must be improved.

c) Customer satisfaction directly affects customers' behavioural intentions.

Service recovery also has an effect on satisfaction, intention to repeat purchase and word-of-mouth activity (Hocutt, Bowers & Donavan, 2006).

Ramsaran-Fowdar (2007), however, refer to research that disputes the effectiveness of the "ServQual" model to measure guest satisfaction in the hotel industry. They list two other models, "LodgeQual" developed by Getty and Thompson in 1994, and "ServPerf" developed by Cronin and Taylor in 1992. It was established that "ServQual" does not measure hotel guest satisfaction effectively because perceived service quality is contingent upon the type of service offering and one generic measure of service quality is inappropriate for all services.

Douglas and Connor (2003) criticise the "ServQual" model because it fails to draw on various disciplines such as psychology, the social sciences and economics. According to Nadiri and Hussain (2005), expectations are dynamic in nature; there will always be a change in customer perceptions and their levels of consumption. Therefore "ServQual" falls short as a measurement tool, since it uses expectation as a comparison standard.

In a study on service quality in Mauritian hotels, Ramsaran-Fowler (2007) found that there are two additional quality dimensions to service quality in hotels. These are 'core hotel benefits' and 'hotel technologies'. When asked what their expectations of a good hotel are, most respondents immediately stated that they wanted a comfortable and relaxed stay with quality food, extra amenities in rooms and recreational facilities.

The core service was therefore the most important quality attribute for these respondents, and this is not represented in the "ServQual" instrument. Ramsaran-Fowler also found that 'hotel technologies' (including access to the telephone, television, e-mail, online reservations and international calling facilities, among others) emerged as critical when establishing the attributes guests use to evaluate hotel service quality.

Akbaba (2005) believes that "ServQual" is a useful tool, but that it needs to be adapted for specific service segments, or cultures. Getty and Getty (2003) warn that

developing a generic assessment measure to assess how guests perceive hotel quality is not easy. This is due to the diversity of property types in the hospitality industry combined with the varied needs of customers. Getty and Getty note that the five dimensions being used in the "ServQual" model are insufficient and they added five more. All five of the additional dimensions are staff related.

Competence: Refers to the employees possessing the necessary skills and knowledge to perform a service adequately.

Courtesy: Describes how polite, respectful, considerate and friendly staff is toward guests.

Credibility: Refers to a guest's inclination to trust the statements an employee makes, thus tapping into the honesty and believability of the service provider.

Access: Describes the extent to which employees are approachable and easy to find.

Communication: Refers to the ability of staff to convey information to guests using language they will understand, listening to the request, and giving the correct answer.

In developing their Lodge Quality Index (LQI), Getty and Getty (2003) settled on five dimensions:

a) collapsing competence, courtesy, security and access into a dimension they called confidence,
b) including credibility in the reliability dimension, and
c) including empathy in the communication dimension.

Wong, Dean and White (1999) developed a scale, HOLSERV, based on ServQual but adapted for hotels, to determine the dimensions of service quality on hospitality. Their results identified three dimensions − staff, tangibles and reliability. Together

they can explain 67.7 per cent of the variation in service quality, with staff contributing 53.3% of the total. These authors suggest that managers should pay less attention to "what is being done" and more to "how it is being done", since staff related factors such as responsiveness, confidence and empathy have a very high impact on general service quality.

3.10   THE PEOPLE FACTOR IN SERVICE QUALITY

Because the production and consumption of services are almost simultaneous, employees play a vital role in delivering guest satisfaction (Kandampully, 2006). Kandampully (2006) reasons that personal service interactions are essentially exercises in services marketing and the creating of trust between the customer and the firm. Kandampully (2006) recommends that employees should have operational and marketing functions and that operations, marketing and human resources should be managed as interrelated internal functions.

Nickson, Warhurst and Dutton (2005) note that no two service interactions are identical, which creates uncertainty in the service delivery process. The service provider and customer both introduce variation to the service, the customer individuality and the service provider inconsistency. Owing to the variability of service encounters, managers are dependent on their staff to maintain consistency of service.

Juwaheer (2004) found that international tourists' satisfaction with their hotel stay was determined largely by the two "core of the core" factors, namely, staff outlook and accuracy, and room attractiveness and décor.   Staff outlook and accuracy includes error-free bills and neatness of staff. Room attractiveness and décor, encompasses details such as attractive features in the bedrooms, appealing decor and hygienic rooms and bathrooms.

Butcher, Sparks and O'Callaghan (2003) explored whether personal treatment is important to service evaluations. They use the term 'social attention', which they define as genuine respect, deference and interest shown in and towards the consumer in such a way that the consumer feels cherished or important during social

contact. Butcher et al's (2003) research found that social attention has a more superior effect than value for money. Salazar, Costa and Rita (2010) found that special attention and personal interaction between customers and staff enhances the customer's perception of the hotel.

According to Nickson, et al. (2005), most previous research focused on "soft" skills, such as social and interpersonal skills, which are concerned with ensuring that staff is responsive, courteous and understanding with customers. However, these researchers believe that not only "soft" skills are needed employees are now expected to embody the product by demonstrating "soft" skills regarding their attitude, and also having the ability to "look good" and "sound right", and in short, drawing on their "aesthetic skills".

Nickson, et al. (2005) argue that the behaviour and appearance of front-line employees is vital: customers see well-presented, courteous, helpful, empathetic staff as fulfilling a key role in quality service. Brexendorf and Kernstock (2007) put a stronger case forward. They believe that employees can no longer be passive elements in a company's brand strategy, but are required to live the brand.

According to Marinescu and Ispas (2012), tourists are becoming more educated; they know what to ask for and appreciate what is offered. Making a difference thus lies in employees' attitude, awareness and ability to listen and facilitate guests' wishes. These authors advise hotels to provide an additional shade to their paid services to ensure that a guests return to the hotel and promote it through word-of-mouth.

Hsieh and Tsai (2009) postulate that Management should recognize that customers from different cultural backgrounds have different needs to satisfy their expectations of service quality and reduce cultural shock. Tsang and Ap (2007) add that as a result of different cultural dimensions, customers perceive quality differently. They use the example of power distance or considering a clients personal space as affecting a customers' evaluation.

Nicholls (2010) notes that customer to customer interaction research has predominantly focused on same-culture and not on cross-cultural interactions. According to Nicholls (2010) this is a deficiency, in the face of the increased cross-cultural nature of consumption of services, such as those being provided by the hotel industry. Nicholls (2010) adds that in many service settings, one customer will have an impact on another customer's service experience.

Wu (2007) investigated the link between customer homogeneity and customer satisfaction in a foreign group travel context. Wu's finding that the higher the level of customer homogeneity the lower the level of negative customer-customer-interaction tension, lends support to the notion that cultural differences between customers may serve to increase customer-customer-interaction tension.

Hospitality employees at resort hotels are often required to help guests "play", and are furthermore expected to act as if they enjoy their jobs and are not being "paid to play" (Crick, 2000). Guerrier and Adib (2003) point out that employees could be seen to be failing at their jobs if they do not appear to be having fun while interacting with guests. Crick (2000) cautions that guests often expect the interaction between employees and guests at resort hotels to evolve into relationships; personnel can be held accountable for their behaviour towards guests, and also for guests' response to them.

Hennig-Thurau, Groth and Gremler (2006) note that organisations are becoming more and more dependent on the authenticity of their service employees, since authentic employees could have a greater impact on the emotional state of the customer.

3.11   CONCLUSION

The full conclusion on the literature review will be dealt with in Chapter 5, but a very short summary on guest satisfaction will be supplied to conclude this chapter. Service quality is antecedent to guest satisfaction therefore guest satisfaction evaluates service quality. Guest satisfaction is what a guest expects to receive from information supplied, and also the perception created by past experiences. Human

interaction with guests, between guests, or between employees and guests has become a greater factor in the level of satisfaction experienced by guests. There are various methods to measure these satisfaction levels.

The following addresses the study's methodology and discusses the research characteristics − the design, tools and approaches used when conducting the study.

CHAPTER 4

METHODOLOGY

4.1   INTRODUCTION

Leedy and Ormrod (2001, p.14) define research methodology as "the general approach a researcher takes in carrying out the research project". Leedy and Ormrod (2003) point out that research is not only the collection of information, or the transportation of data from one source to another; it is a methodical process involving gathering, analysing and interpreting information to enable the researcher to understand the subject being examined. Saunders, Lewis and Thornhill (2000) add that research is undertaken to find out 'things' in a systematic way, and in this way knowledge is increased.

4.1.2 Characteristics of Research

Leedy and Ormrod (2010) state that research projects vary in complexity and nature, but that research typically has eight distinct characteristics.

1. It originates with a question or problem.
2. It requires clear articulation of a goal.
3. It requires a specific plan to proceed.
4. It usually divides the principal problem into more manageable sub-problems.
5. It is guided by the specific research problem, question, or hypothesis.
6. It accepts certain critical assumptions.
7. It requires collecting and interpreting data in an attempt to resolve the problem that initiated the research.
8. It is, by its nature, cyclical or, more exactly, helical.

Leedy and Ormrod (2010) explain that research is rarely conclusive and yields as many problems as it resolves; it is not a one-time act, self-contained, or an end in itself and can thus be described as helical.

4.1.3 Research Tools

Leedy and Ormrod (2010) note that research methodology and research tools are often confused. Research methodology refers to the approach a researcher takes in carrying out the research, which dictates the tools the researcher would use. Research tools are part of a specific mechanism or strategy a researcher uses to collect, manipulate and interpret data.

The authors list six general tools of research.

1. The library and its resources.
2. The computer and its software.
3. Measurement techniques.
4. Statistics.
5. The human mind.
6. Language.

Tools 1 to 4 mentioned above are self-explanatory, but points 5 and 6 need explanation.

4.1.3.1 The Human mind

Leedy and Ormrod (2010) believe that the human mind is the most important tool for researchers, since nothing matches its powers of comprehension, integration of reasoning, and insight. The human mind can also think critically, deduce and collaborate with others to question others' research, make assumptions, and work with colleagues.

4.1.3.2 Language

Language not only assists with communication, but also enables people to think more effectively (Leedy & Ormrod, 2010). The authors note that when thoughts are represented by words or phrases, people can think more clearly about a topic.

The study's methodology is outlined in the following chapter. The methodology was designed to address the following problem statements:

1:     The information of OTAs such as www.expedia.com and www.booking.com has an impact on the buying decisions of tourists.

2:     The information supplied by websites also has an impact on their satisfaction levels.

The aim of this study was to determine whether   guests who make their reservations via websites have a higher or lower satisfaction rating than the overall satisfaction level of the hotel.

4.2   Research design

Leedy and Ormrod (2003) explain that research design is the strategy that the researcher follows to solve a research problem. Saunders, et al. (2000) add that there is a distinction between strategy and tactics. Strategy is the general method that the researcher adopts, while tactics involve the finer details of data collection and analysis.

Leedy and Ormrod (2003) warn against clouding research planning with research methodology. The approach to planning may be related across disciplines, but the methods of gathering information and the analysis of this information may be specific to one particular discipline. The authors also note that the research objectives should be clear and derived from the research question, the various sources of data should be listed, and constraints such as access to data, time, money, location and ethical issues should be considered.

4.3   RESEARCH APPROACH

According to Williams (2007), the research approach can be quantitative, qualitative or a mixture of the two. To decide which approach to take, the researcher has to anticipate the type of data needed to respond to the research question.

4.3.1 Quantitative Approach

Creswell (2003, p. 153) asserts that quantitative research comprises the collection of data so that information can be quantified and subjected to statistical treatment in order to validate "alternate knowledge claims". Quantitative research involves the collection of numeric data and the researcher uses mathematical models to analyse the data. There are three broad classifications of quantitative research (Leedy & Ormrod, 2001).

4.3.1.1   Descriptive

This is a basic method that examines the situation in its current state.

4.3.1.2   Experimental

This method investigates the treatment of an intervention into the study group and then measures the outcome or influence of the treatment.

4.3.1.3   Causal Comparative

This method examines the cause and effect between dependent and independent variables.

The quantitative approach involves developing a theory that can be tested (Saunders et al. 2000). Creswell (2003) emphasises that quantitative research methodology assumes an empiricist paradigm and maintains that the research is independent of the researcher.

Data collected from quantitative research, according to Creswell (2003), is used to objectively measure reality and create meaning through objectivity uncovered in the collected data. Leedy and Omrod (2001) agree with Creswell (2003) that the aim of quantitative research is to confirm or validate relationships and seek explanations and predictions within the collected data that will generate to other persons and places.

4.3.2 Qualitative Research

The qualitative approach begins with an observation and the sample population is usually small (Leedy and Ormrod, 2003). It is concerned with the contexts in which events take place. Leedy and Ormrod (2001) point out that qualitative research is less structured than quantitative research, as it formulates and build new theories. Creswell (2003) describes this type of research as effective, since it occurs in a natural setting, the researcher is highly involved and thus able to collect a detailed amount of data.

Qualitative research is based on inductive rather than deductive reasoning and is conducted within a poststructuralist paradigm (Leedy & Ormrod, 2001). There is a strong relationship between the observer and the data, compared with what occurs in qualitative research where the researcher is strictly outside the phenomena being investigated. Leedy and Ormrod (2005) point out that the qualitative research method is used to describe and interpret, rather than to test a hypothesis. It is recommended when;

   a) there is limited information about a topic,

   b) the research variables are unclear or unknown,

   c) a relevant theory base (in any sense) is missing.

According to Leedy and Ormrod (2001), in qualitative research there is no beginning point of 'truth', or any established assumptions from which the researcher can begin. Data is collected from the senses and is used to explain phenomena relevant to social behaviours. The authors note that there are several methods of conducting qualitative research, but recommend the following five.

4.3.2.1 Case study

Creswell (2003) defines a case study as the in-depth exploration of a programme, an event, an activity, a process, or of one or more individuals. Leedy and Ormrod (2001) add that it needs to take place within a specific time frame.

4.3.2.2 Ethnography

The difference between ethnography and a case study is that ethnography studies an entire group that shares a common culture (Leedy and Ormrod, 2001). This type of research takes place over a prolonged period of time (Creswell, 2003).

4.3.2.3 Grounded Theory

The term 'grounded' requires that the theory has to emerge from data collected in the field, rather than from a literature review (Leedy and Ormrod, 2001). Grounded theory is primarily used in sociology, since it examines people's actions and interactions.

4.3.2.4 Phenomenological Study

Leedy and Ormrod (2001) explain that this type if study is undertaken to understand an experience from the participants' point of view. The focus is on the participants' perceptions of the situation or event. The difficult part of this type of study is that the researcher usually has some connection or stake in the situation, and thus has to set aside all prejudices and bias (Williams, 2007).

Williams (2007) cites Creswell (1998) who states that the procedural format for this type of research is to develop the research questions that will explore the meaning of the experience, conduct interviews, analyse the data to find clusters of meanings, and end with a report that furthers the readers' understanding of the essential nature of the experience. Williams (2007) concludes that this type of study collects data to identify common themes in people's perceptions of experiences.

4.3.2.5 Content Analysis Study

Leedy and Ormrod (2001:155) define a content analysis study as "a detailed and systematic examination of a particular body of materials for the purpose of identifying patterns, themes or biases. Research by Williams (2007) concluded that content analysis review forms of human communication include, but are not limited to books, films and newspapers.

4.3.3 Mixed methods approach

The mixed method approach is used when both numerical and textural data are required to answer the research question (Williams, 2007). Researchers incorporate methods of collecting and analysing data from the qualitative and quantitative research approaches (Creswell, 2003). Researchers thus collect and analyse both numeric and narrative data.

4.4 Planning the empirical study

The current study chose the phenomenological approach of qualitative analysis using semi-structured survey questionnaires. The questions were based on the literature study; the data was tabulated, and then analysed. The process followed is described below.

4.4.1 Designing the questionnaire

The researcher determined that a questionnaire was an appropriate measuring instrument to be used for the study. According to Gillham (2000), questionnaires are just one of a variety of ways to collect information from people. Gillham (*2000*) emphasises that questionnaires should be well structured to ensure clarity and remove ambiguity.

Questionnaires could contain both closed and open-ended questions. Closed questions present answers from which the respondents have to choose; answering is faster, since the answers require minimal writing. The results are easy to analyse and it is easy to compare responses. Open-ended questions are frequently used in interviews when in-depth answers are important to the research (Saunders et al. 2000:291).

For the purpose of this study both closed and open-ended questions were used.

When designing the questionnaire, no rating scale, such as a Likert scale, was used. Most of the closed questions required a 'yes' or 'no' answer. The researcher did not want to prompt the interviewees, since with regard to the open-ended questions, he

wished to understand the booking and stay experiences from the guests' point of view.

When designing the questionnaire, the researcher followed what Krosnick and Presser (2010) refer to as conventional wisdom. This entails

1. Using easy, well-known words (avoid technical terms, jargon, and slang),
2. Using simple composition,
3. Avoiding words with unclear meanings, that is, use words that all respondents will interpret in the same way,
4. Striving for wording that is unambiguous and specific (rather than abstract and general),
5. Making response options comprehensive and mutually exclusive,
6. Avoiding leading or loaded questions that drive respondents toward a particular answer,
7. Asking about one thing at a time (avoid double-barrelled questions),
8. Avoiding questions with single or double negations.

Conventional wisdom, according to Krosnick and Presser (2010), also contains advice about how to optimize question order.

1. Early questions should be informal and pleasant to answer, and should build a relationship between the respondent and the researcher.
2. Early questions should clearly address the survey topic as it was explained to the respondent prior to the interview.
3. Questions on the same theme should be grouped together and proceed from general to specific.
4. Questions on sensitive or uncomfortable topics should be placed at the end of the questionnaire.
5. Questions should be filtered, to avoid asking respondents questions that do not apply to them.

The authors also recommend conducting a pilot study to pre-test the questionnaire, with reference as to how this is best accomplished.

4.5   THE PILOT STUDY

The main purpose of a pilot study is to refine the questionnaire, to determine if the respondents are able to answer the questions and whether there will be difficulty in recording the data. Saunders, et al. (2000) believe that pilot studies assist in measuring the validity and reliability of the data to be assessed, thereby ensuring that the data collected will enable the investigative questions to be answered.

As The Monarch Hotel is in Johannesburg and the researcher is based in Port Elizabeth, the researcher decided to test the questionnaire with guests at No5 Boutique Art Hotel in Port Elizabeth, owing to time and financial constraints. The respondents for the pilot study were two guests of No5 Boutique Art hotel who made their reservations via www.booking.com and www.expedia.com, respectively. The questionnaire was also presented to the general managers of both The Monarch Hotel and No5 Boutique Art hotels to review.

4.6   THE SAMPLE POPULATION

Leedy and Ormrod (2003) warn that it is generally difficult for a researcher to study an entire population. It is thus necessary and important to select a sample that represents the population under study, thereby enabling the researcher to make generalizations about the population.

Owing to time and financial constraints, the researcher made use of non-probability convenience sampling. The difference between probability and non-probability sampling is that

a)   With probability sampling every element of the population − in this case every guest who was staying at The Monarch Hotel – would statistically have had the chance of being selected.

b)   With non-probability sampling little or no attempt is made to obtain a representative cross section of the population − in this case only guests who booked via an OTA and have agreed to participate.

Convenience sampling was added to the sampling method because the researcher had to travel to Johannesburg and needed to choose a date when there would be several guests staying at the Monarch, who had made their reservations via an OTA.

In using convenience sampling, the researcher was aware that this type of sampling includes certain drawbacks, for example, the probability of inclusion is unknown and no reliability or sampling precision statistics can be calculated.

With assistance from The Monarch Hotel, a week (Monday – Friday) was chosen where there were a minimum of 10 guests arriving or departing who had made their reservations via an OTA. The researcher aimed to interview as many guests as possible. The researcher relied on the general manager of the hotel to screen the guests and introduce the research. Respondents were asked whether they were willing to be interviewed before, during or after breakfast on their day of departure.

4.7   RESPONSE RATE

Over the selected period there were 26 guests staying at The Monarch, 14 of whom had made their bookings via an OTA. Seven of the guests who made their bookings via an OTA agreed to being interviewed.

4.8   CONCLUSION

To obtain information from the respondents, it was decided to use personal interviews to complete the questionnaire. The questionnaire is included as Addendum D. The actual answers to the questionnaires are included as Addendum E. The findings, analysis and summary of the study appear in chapter 5, together with the findings from the literature reviews on the tourism distribution channel and guest satisfaction.

CHAPTER 5

FINDINGS FROM THE LITERATURE REVIEW AND PERSONAL INTERVIEWS

The following chapter summarises the findings from the literature review on the tourism distribution channel, guest satisfaction, and review the results of the interviews held with guests who made their reservations via an Online Travel Agent.

5.1 FINDINGS FROM THE LITERATURE REVIEW ON THE TOURISM DISTRIBUTION CHANNEL

The tourism distribution channel is continuously evolving. Within the tourism industry, service providers who want to bypass or ignore the middleman will be doing so to the detriment of their revenues, not adapt to and with the changes happening in the industry as a whole, the distribution channel, and some of the elements involved. Hotels and tourism service providers could thus find themselves not being considered by clients.

The tourism distribution channel still performs the same functions it did when it was originally created. It acts as the link for information exchange between the buyer and seller, bundles together tourism products, such as flights, car hire and accommodation and reduces the risk to the consumer by giving advice, assessing the quality of the facilities and products and in some cases, reducing the number of choices for the client.

In addition it facilitates payment, booking products that are remote and acts as a contact on the ground at the destination. The tourism distribution channel thus connects the buyer and seller. It assists the seller to promote its products and gives the buyer peace of mind with the choices made.

The tourism distribution channel is becoming more electronic and digital. The internet is an ideal platform for promoting, buying and selling tourism. Since it connects buyers and sellers directly with each other, it has nullified the constraints

of distance, location and time zones, reduces price discrimination opportunities and the unequal barriers to entry and promotion that exist between large and small sellers and buyers by facilitating equal competition.

There however, is still a need for traditional travel agents and human interaction, particularly for complicated, multiple stay and product bookings, travel to remote destinations, group travel and for those consumers who have a fear of technology.

Convenience also plays a role in the continued existence of traditional travel agencies, for example, when having to obtain quotes for corporate governance, or to reduce the numerous choices offered on the internet. These agencies might not be doing their business from the same locations as previously. They too have embraced the advancements in technology and the opportunities that come with it, such as websites and the GDS, to enhance the services they offer their clients.

OTAs will continue to strengthen, since they are an effective and efficient distribution channel. For example, on www.expedia.com, consumers can book flights, accommodation, car hire and activities. Customers can make one payment for all products and services using a credit card. They can choose what language and currency they want to transact in.

Special product promotions appear on the website and there is a support page with frequently asked questions and answers.   Expedia, for example, remembers which hotels a customer investigated previously with a function called My Scratchpad.

Having visited www.booking.com and www.expedia.com on a regular basis, the researcher believes that these OTAs are trading in and catering to what could be called a buyer's market. Expedia boasts that it has over 290 000 hotels listed worldwide and Booking.com claims it has 536 861 worldwide (14 September 2014). Promotional terminology such as 'deals', 'discount', 'save', 'best price guaranteed' are prominently displayed all over the various pages.

Word-of-mouth, or Web 2.0 as this form of marketing is called on the internet, is becoming a powerful marketing tool. The tourism and hospitality industry is one

industry that is in the forefront with regard to this phenomenon. However, it must be considered that

- Some of the reviews could be false, either made by the hotel when it is a positive review, or made by a competitor when it is a negative one.

  o OTAs such as Booking.com and Expedia have overcome the review challenge mentioned above by allowing only reviews by a client who made abooking via their system and only after a client has 'stayed and paid'.

- Although there are numerous reviews on various websites, it must be noted that this represents only a very small sample of tourists. In addition, these reviews are mostly posted by guests who are either very satisfied or very dissatisfied. Those guests who receive exactly what they paid for or expected, normally do not post a review.

5.2   FINDINGS FROM THE LITERATURE REVIEW ON GUEST SATISFACTION

Service quality is the antecedent to satisfaction, businesses exist, because they have customers to serve and customer satisfaction has a direct and positive impact on the viability of a hospitality business. However, service quality and customer satisfaction are not interchangeable: customer satisfaction is the evaluation of the service received. Customers have a satisfaction range, the zone of tolerance, with desired service at the top and adequate service at the bottom. If service received fall within this zone, clients will be satisfied.

In hotels service quality is grouped into physical product, service experience and food and beverage. These three groups need to be integrated to optimize the delivery of services. Service quality is not seen as the sum of these three groups (by hotels guests), but as a whole.
However, elements within these groups can be necessary, desirable or neutral cues to ensure good perceptions of quality. Some of these elements such as

housekeeping and hygene are core, whereas others such as reception and price are supporting factors. Tangible elements of service quality at hotels are related to the physical facilities, whereas intangible elements relate to the service, convenience, understanding and caring of the hotel management.

Guests are largely undifferentiated with regard to the tangible elements of a product. However, if these tangible elements are below standard, it will have an impact on the intangible elements, such as service.

The needs, wants, values and expectations of customers are continuously changing. The modern day customer is more service than product orientated. These changes in expectations are driven by customers' external changes in lifestyle and no longer by the internal changes of hotels.

Customer satisfaction is determined against what the client expected versus what the client received. Expectations are not only created by what the marketing material states, but also by clients' past experiences. Perception is significant. Expectations are also created by purpose of stay, gender, culture, nationality and the rate guests pay. Greater access to information has also increased the levels of expectations of guests.

Service failures are inevitable and customers can either accept, complain, walk away, or spread negative word-of-mouth about the product or service. When applied consistently, service recovery could overcome the negative impression service failures create. Customer sacrifice is when a client settles for less than what was expected. Good service can be used as a tool to differentiate hotels.

To be able to provide good service and satisfy guest expectations, hotels need to understand and know their customers. Hotels need to provide experiences rather than just delivering goods and services. By customizing a service, it is turned into an experience.

Maintaining high customer satisfaction levels has a direct impact on revenues. Losing one customer does not mean losing only one sale, but potentially all the sales

this customer could have made over a lifetime. Satisfied customers spread positive word-of-mouth and will not necessarily become loyal customers, but without satisfaction there will not be loyalty.

Exceeding customer expectations is not merely exceeding what the client expected, but rather delivering the unexpected. Customer surprise and/or customer delight can only be present if there is customer satisfaction and minimal customer sacrifice. Delighted customers are exhilarated, thrilled and exuberant with a product or service, thus there is a positive emotional response. Delightful service cannot be as easily replicated as, for example, remodelling a room or reducing room rates.

There is no one size fits all when measuring service quality and guest satisfaction. Governments, associations, websites and guidebooks all have different ways of measuring guest satisfaction. Thus a hotel could have different rankings from these other organizations. This not only confuses clients, but also makes them conclude that these ratings are arbitrary and thus cannot be trusted.

Measuring tools developed over the years not only measure the difference between expectation and actual performance, but also the difference between perception and actual performance.

Service quality and thus by implication, guest satisfaction, has a high dependence on the people factor. Employees play a vital role in service delivery and guest satisfaction as the production and consumption of hotel services are almost simultaneous. Customers and employees both introduce variation to the service encounter. Thus no two service interactions are identical as the customer introduces individuality and the employee inconsistency.

Personal treatment or social attention has a superior affect on customers compared with value for money. Different cultures have different perceptions of quality and in many service settings one customer could have an impact on another customer's service experience, thus creating customer-customer-interaction tension.

Staff needs to be capable, competent, satisfied, motivated and committed. Hotel employees are expected to be authentic, although they are sometimes paid to 'play'. Employees are not only accountable for their behaviour towards guests, but also the behaviour of guests towards them.

5.3   FINDINGS FROM THE PERSONAL INTERVIEWS

The research subject matter was to a large extent inspired by the findings of J.D. Power and Associates. They found that guests booking via an OTA are more price sensitive, have lower levels of satisfaction, are less loyal and tend to report more problems. The actual answers to the questions from the questionaire can be found in Addendum E, but for the purpose of summarising the findings, the questions and answers have been grouped together.

The findings from the personal interviews are grouped into five sections.

Section one explains the sample, how many guests were interviewed, their country of origin and the source of their booking.

Section two outlines how the guests found out about The Monarch Hotel, the reason for their stay, whether they conducted more research on the hotel, whether price was a consideration and why a specific OTA was chosen.

Section three discusses whether the hotel lived up to the marketing material the respondents were exposed to and whether the service they received from the staff was to their satisfaction.

Section four clarifies whether the respondents enjoyed their stay, and whether they would return, and recommend the hotels to others.

Section five summarises the interviews.

5.3.1 Details of the sample

The interview was conducted over three days, from Sunday 9 November 2014 to Tuesday 11 November 2014.

The following should be noted.

a) The researcher chose these specific dates due to the high concentration of OTA reservations (14) over this period.

b) All the respondents were briefed on the study and were willing to assist.

c) The Chinese guest who booked via Agoda was not considered owing to difficulties with language.

d) The selection of the respondents was dependent on the help of the General Manager, who could have been biased in his selection criteria (selecting only those guest he knew had a good experience). Table 5 summarises country and source of booking.

Table 5. Summary of source of booking and country of origin

Source	AUS	China	Nigeria	SA	UAE	USA	UK	GER	Total
Agoda		1							1
Booking Button					1				1
Booking.com	2			3		1	1		7
Direct	1			4					5
Expedia			1	3		1		1	6
Giltedge Travel (Pty) Ltd				1					1
Mantis Head Office				2					2
Stanbic				1					1
University of Cape Town				2					2
Grand Total	**3**	**1**	**1**	**16**	**1**	**2**	**1**	**1**	**26**

Source: *Opera (PMS) 11 November 2014*

As can be seen from the table, most of the guests (16) were from South Africa, three from Australia, two from the United States and one guest each from China, Nigeria, the United Arab Emirates, United Kingdom and Germany.

Seven guests booked via Booking.com, six via Expedia and one via Agoda. Five guests booked directly with the hotel and one guest made a booking via the hotel's website, that is, the Booking Button. Three guests were booked via their respective companies, namely, Stanbic and the University of Cape Town. One guest booked via a travel agent, Giltedge Travel. The researcher also stayed at the hotel during this period and this is reflected under Mantis Head Office.

Of the 14 guests who booked via OTAs, the researcher, with the help of the General Manager, Jan van As, was able to interview seven.

Source	Nigeria	SA	USA	UK	GER	Total
Booking.com		3		1		4
Expedia	1		1		1	3
Grand Total	**1**	**3**	**1**	**1**	**1**	7

Four guests who booked via Booking.com and three via Expedia were interviewed. All the interviews were conducted on the morning of the guests' departure (before, during and after breakfast).

5.3.2 Process followed prior and during booking process

I. How did the respondents hear about The Monarch prior to making their bookings and what was the reason for their visit?

All seven respondents heard about the Monarch via different channels and two of them were return visitors. Five of the seven guests were staying at the hotel for business purposes.

One of the return visitors was a business partner of the previous hotel owner and a travel agent first introduced the other to The Monarch. Both these return visitors made their bookings via Booking.com

One of the leisure guests saw an advert in a magazine and decided to 'try out' The Monarch Hotel as it was in the same price range as the hotel normally frequented. The other leisure guests specifically searched for a boutique hotel. Bigger hotels, according to these two guests, are too impersonal. They were also concerned that the number of guests staying in a bigger hotel would spoil their stay. These guests had to choose an alternative suburb, as Sandton was too expensive.

A friend who had stayed at the hotel before, had introduced one business guest to The Monarch Hotel. Another chose The Monarch Hotel from various options on Expedia because it looked the most attractive and the price was within this guest's daily budget. It must be noted that this guest booked at a special rate, owing to a last minute cancellation by other guests.

One of the guests was not involved in the booking process at all. The business partner's secretary had to make the reservation at very short notice.   Five of the guests wanted to stay in Rosebank and were thus looking for hotels in that suburb. The seventh guest did not give a reason why Rosebank was chosen , but explained that he visited Johannesburg every quarter for business.

II.   Was more research done on the hotel and was price a consideration?

Four of the guests did more research on The Monarch prior to making their reservations; three of them specifically stated that they visited www.monarchhotel.co.za; two visited www.mantiscollection.com and www.tripadvisor.com, respectively.

One of the return visitors, whose first stay was made via a travel agent, had absolute trust in the agent and did not deem it necessary to do research. The other return visitor, who was a business partner of the previous hotel owner, also deemed it unnecessary, but stated that when booking other hotels, research was conducted.

The guest whose stay was booked by the secretary made the assumption that she did research and suggested that she might have visited the hotel prior to making a

booking. The respondent stated that when bookings for other hotels are made TripAdvisor is consulted.

One of the guests phoned the hotel to make sure that visitors could be entertained. Another guest who booked via Expedia visited Booking.com to do research. One leisure respondent specifically stated that Tripadvisor was the most beneficial source of information. Five of the guests compared hotel prices. One of the guests who did not compare prices, mentioned that he had a daily accommodation budget. The other, whose booking was made by the secretary, assumed that a price comparison was done.

Three of the guests chose The Monarch because it was in their price range. One of these guests stayed at The Monarch for business reasons and the other two for leisure purposes. The other two business guests who compared prices decided to stay at The Monarch. The one categorically stated that price was not a consideration and the other had to stay at The Monarch Hotel because it was company policy to provide three quotes and The Monarch Hotel was the most reasonable.

The researcher received the impression that one of the latter two respondents did not want to give his friend, who recommended The Monarch, the impression that he could not afford the hotel and the other had obtained quotes for more expensive hotels than The Monarch.

One of the return visitors was not concerned about price, but mentioned that a 'close eye was being kept' that the hotel did not become too expensive.

III.   Why was a specific OTA was chosen to make the reservation?

a. Booking.com

Three of the four respondents who used Booking.com referred to the convenience and ease of using this platform. The fourth respondent always used this OTA, although he believed that the prices on all the websites are the same. The researcher verified that this is true. When hotels signs contracts

with OTAs, OTAs have a clause insisting that they get the best possible rate, unless there is a specific promotion with strict terms and conditions. This was the case with the respondent who booked via Expedia at a special rate.

The two return visitors both made their reservations via Booking.com. The researcher asked whether they would consider booking directly with the hotel if a better rate were given to them. Both respondents answered in the affirmative. One suggested that the discount should be in the form of additional value, such as a dinner or a transfer. The other suggested that the booking process should be quick and easy.

b. Expedia

The responses for why Expedia was chosen were more diverse. One leisure guest made all holiday bookings via this OTA and mentioned that it was easy to convert prices into Euros. One business guest made the booking on Expedia as this OTA provided the best price. The other business guest did not know which OTA was used, and had to be told it was Expedia - co-incidentally Expedia was his OTA of choice.

To conclude, five of the seven respondents compared prices, although all five were not concerned about rate. One respondent compared prices as a result of company policy; another compared the price of The Monarch Hotel with the hotel regularly frequented. One respondent commented that The Monarch Hotel's rates are much cheaper than hotels in Sandton. The two other respondents, although they did not compare prices, had decided to book The Monarch notwithstanding.

Two of the seven respondents were return visitors. The researcher suspected that one manipulated the quotation process by obtaining quotes from two more expensive hotels to ensure that The Monarch complied with company policy. The other guest had stayed at the Monarch ten times previously.

When the researcher asked whether the respondents would consider booking directly if they were rewarded, both answered in the affirmative. The incentive asked for was not a reduction in price, but either additional value or convenience.

5.3.3 Did the hotel and the service received meet the expectations created by the marketing material?

I. Did the facilities and hotel room reflect the information you consulted prior to making your reservation?

All seven respondents affirmed that they received what they expected. Some of them commented that the hotel is bigger and more luxurious than expected. Two explicitly stated that expectations were exceeded; two mentioned that the photographs used in the marketing material do not do the hotel justice. One respondent commented that it is difficult to capture the atmosphere in a photograph. Two respondents described the cigar lounge as pleasant. Three respondents specifically mentioned the courtyard area; one thought that it is probably under-utilised, and suggested it would be a good option for breakfast.

All the respondents complimented the rooms and stated that they were bigger than expected. They added that the amenities in the rooms are extensive; some rooms have two television sets. Two respondents specifically mentioned the layout of the room; one stated that it was well planned. Two respondents referred to the working desk in the room as very comfortable to work at.

Not all responses were positive, however. Two of the South African guests referred to the bus stop in front of the hotel. One was very disappointed with the size of the access to the parking area. The same guest also expected a gym on the property, but realized that the marketing material stated that there is a gym nearby.

One of the return visitors would have liked to see the menu being changed on a more regular basis, as it had not changed for the past three visits. Another, whose

children visited, mentioned that the menu had limited options for children, but a waiter and the kitchen quickly resolved this.

Two respondents complained about the selection of television channels. One suggested that the Fashion Channel should not be an option. One of these guests was surprised that the mini-bar was complimentary and would have liked to have an alcoholic beverage in the room, which was not provided, as it was stocked with only non-alcoholic refreshments.

II. Did the appearance of the staff and the service received from them meet expectations?

The responses received from the respondents regarding the appearance of the staff varied. Some were very impressed, while one was not impressed at all. The guest who was unimpressed believed that the staff look similar to those at any other hotel and made a remark that they seemed uncomfortable in their uniform, since they would not normally dress in this way.

Another, who stated that the uniforms made the staff appear to be someone they are not, agreed that the staff looked uncomfortable in their uniform. One guest observed that it is easy to identify the staff, but would have liked them all to wear name badges. One guest thought that the staff looked very professional, but felt they should be wearing a more relaxed style of clothing.

In contrast to the above, one guest commented that the staff blended in with their environment. One of the return visitors commented that the staff have become more in tune with their environment over time.

The Nigerian guest compared the staff with those in his home country and was very complimentary using words such as shiny shoes, smiling faces and pride. The American guest had similar views, stating that the staff was always well groomed and that they performed their duties as if it was a calling and not a job.

All respondents mentioned the staff's friendliness. One respondent mentioned that the staff are not 'robots' and when they smile, it is a real smile. The American guest had heard mixed reviews prior to his visit to South Africa, but agreed that the service is good and the staff friendly. The researcher could not help but notice that this particular guest defended the staff, stating that the different accents and terminologies make the staff members' jobs more difficult.

One of the return visitors spoke about the fact that the staff had started to address him by his first name, but remained professional by adding a Mister. He felt that it was a very nice gesture and it made him feel that his business was appreciated. When realizing that other return guests, as well as the general manager are addressed in the same way, he started referring to the general manager as "Mr Jan" This guest felt comfortable enough to inform "Mr Jan" that other guests had complained about the slow service at breakfast time, although it did not trouble him.

Consistency was lacking at times: one guest observed that the "A" team was on duty when the hotel was busy at breakfast time and between 16h00 and 18h00 when guests return for the day. The reason for this remark was that the lunch service is much slower.

The staff's efficiency, their attention to detail and their multi-tasking capabilities were complimented. One of the guests used the example of a waiter who arranged a taxi for him and a receptionist who ordered him a drink. The guest who was concerned about the access to the parking area, specifically stated that he was immediately put at ease by the staff during the check-in procedure, as he was fairly cautious upon arrival. The Nigerian guest commented that the staff did the same amount of work as what three people would do in Nigeria.

The German leisure guests believed that when the staff were asked something out of the ordinary they got a little flustered. Another, however, felt that the staff knew exactly what guests want. One guest made reference to staff thinking one step ahead and offering a hot chocolate at 01h00 (in the morning) and asking whether a wakeup call was needed.

III. Were the staff competent, knowledgeable, responsive, understanding of your needs and did they make you feel special?

The first respondent was very complimentary of the staff: this guest added that because of the staff, he would choose a boutique hotel in future as the hotel of choice. According to this guest, the staff gave a personal, intimate experience.

The American guest echoed the first guest's response. He thanked the person who made his booking profusely for introducing him to a boutique hotel experience. He added that the staff had perfected the art of personal experience and were truly sincere.

The guest who was staying for the third time mentioned that the staff had become more competent since his first visit. This guest complimented their attention to detail. The staff had remembered exactly how the respondent preferred his coffee, and that he did not like a cold room. Being acknowledged as return visitor by being upgraded to a better room, was also memorable.

The German leisure guests were impressed that three options were given for a city tour and that the staff were attentive, but not intrusive. These guests felt that the staff went out of their way to make their short stay enjoyable and that they are an asset to the hotel.

The Nigerian guest would personally employ all the staff and commented that he would visit South Africa again simply to stay at The Monarch Hotel. He had not been made to feel so important and 'looked after' before at any other hotel. The guest visiting for the tenth time commented that staying at the hotel was a 'treat'. This guest observed that the staff tended to speak their home language when talking to each other and stated that since one did not know what they were saying, they could be talking about guests.

IV.   What was the most enjoyable part of the stay?

The first respondent stated that there was not any one thing that stood out. The whole package was enjoyable − the room, public areas, restaurant and service seemed to complement and not 'overpower' each other.

Two guests was of the opinion that it was the staff who made their stay enjoyable. One made reference to how the staff adapted when there were no items for children on the menu, and the other stated that the staff tried to make guests feel like royalty. This guest added that the staff were trying to make the guest experience live up to the name of the hotel.

The German guests stated that The Monarch's staff had set the service 'bar' very high. They were hoping that the service they would receive during the remainder of their holiday in South Africa would be of the same standard.

The American guest was impressed that everything ran smoothly. This guest stated that when staying at other hotels he had experienced problems. He also mentioned that the staff had mastered giving personal service, but remained professional.

One of the return visitors was impressed that new multi-adapters had been installed since his last visit. During the guest's previous visit, a special request had to be made. The return visitor was most appreciative of this.

5.3.4   Was the stay memorable and will you return and recommend the hotel?

I.   Will you return to The Monarch and why?

Only the German guests were doubtful whether they would return. They stated that they would like to explore many other countries. One of the guests had made a reservation for a return visit and another respondent a tentative booking.

The reasons guests gave for intending to return varied. One guest said that the hotel has some kind of magnetism; another said that he had found a new 'home from home' and that the hotel is very conveniently located. One of the return visitors also referred to the hotel's comfort.

The Nigerian guest mentioned the hotel's luxury and the staff's friendly faces and asked, 'Who would not want to come back?'

The American guest had had very successful meetings and would be returning to South Africa on a regular basis. He had negotiated a regular guest rate with 'Mr Jan'. This guest was hoping he would also be addressed in this way, that is, with a Mr before his first name.

II.   Will you recommend the hotel and post a review?

When asked if the respondents would recommend The Monarch to family, friends or colleagues the answer was overwhelmingly in the affirmative. A number of guests stated that they had already done so. A few of the guests had also posted photos and comments on Facebook. The American guest stated that he had told his South African business partner that whenever they were asked to recommend a hotel for business or leisure, they should recommend The Monarch Hotel

Three of the guests stated that they would post a review on a travel website. One of these guests believed that the hotel deserves to be acknowledged. Another, who was a return visitor, stated that he had posted a review after the first visit.

The reasons the four guests gave for not wanting to post a review ranged from wishing to be private to not interacting with the social media,   registering on these sites as too cumbersome and not having the time to post reviews.   The German guests, who gave the reason for not posting a review as wishing to retain their privacy, are however doing a travel blog, which all their friends are reading.

III.   What will you remember about your stay

Only one of the seven respondents did not specifically mention the staff when asked the above question. This respondent referred to the lunch he had had with his children in the courtyard. This experience reminded him of a Saturday at home. This guest also referred to The Monarch Hotel as his new 'home from home' when asked if he would return to the hotel.

The American guest remarked on the understated luxury of the building, the rooms and facilities. One of the guests commended Zach, the front office manager, for the way in which he welcomes guests and 'gets things done'. Another guest, although not singling out any specific staff member, remembered the attention to detail the staff showed and how they seemed to 'do things right' the first time.

When asked what the most enjoyable part of his stay was, the Nigerian guest emphasised that he would remember how he was 'treated like royalty' The German guests would remember the service and how the staff made their two nights in Johannesburg a good start to their holiday.

5.3.5 Summary of interviews

To conclude the findings from the personal interviews, the five main themes that came to the fore during the interviews were

I.   The majority of guests made use of an OTA because of convenience and the ease of making a booking on this platform.

II.   Guests either chose to make use of a specific OTA, since they had used it before, or because of the price offered.

III.   All guests would recommend The Monarch, but not all would use the social media to do so.

IV.   All guests were impressed with the hotel and its facilities.

V. The staff of The Monarch made a lasting impression.

The findings from the interviews are in line with the findings from the literature reviews on the tourism distribution channel and guests' satisfaction.

The tourism distribution channel facilitates the booking process by introducing the buyer and seller to each other and facilitates their interaction. It also gives the client peace of mind with the choices made. The German guests, who will be staying in multiple cities and at various hotels, are proof that although the literature states that there is still a need for the traditional travel agencies, these agencies are under threat from OTA's as they made a multi destination booking on a digtal platform.

Although a lot of emphasis is being placed on the social media, this platform does not give a true reflection of the performance of a hotel, nor the experience of guests. A minimal number of guests post reviews on travel review websites.

According to Pine and Gilmore's (2000) equations for customer satisfaction, sacrifice and surprise, all respondents made little or no sacrifice, and perceived that they had received more than what they expected. The service the majority of the guests received had an influence on their overall level of satisfaction, thus agreeing with the research that service quality is antecedent to satisfaction.

A minority of the guests were not able to pinpoint a specific element that stood out, but their responses agreed with findings from the literature review that the experience as a whole was good. Two of the guests whose frame of reference and expectations were created by past experiences in bigger hotels, believed that a boutique hotel experience is better.

The expectation created by the OTAs and travel review sites seemed to have created a lower expectation than what was actually received and perceived. The hotel in general, and specifically the rooms, were all bigger than what was expected. The researcher concludes that the information the respondents perused prior or during their booking process did not encapsulate the service or friendliness of the staff.

The interview findings agree with the literature that The Monarch's physical attributes are important. The intangible elements, such as the friendliness of, and service given by the staff, however, carry more weight than the physical attributes since six of the seven respondents mentioned the staff in relation to what they would remember about their stay.

CHAPTER 6

DISCUSSIONS, CONCLUSIONS, AND RECOMMENDATIONS

6.1 DISCUSSION

This research was based on the assumption that information supplied by OTAs has an impact on the level of guest satisfaction at hotels. The hotel chosen to test this assumption was The Monarch Hotel in Johannesburg. Factors that contributed to the research were research by J D Power and Associates who found that guests who booked via an OTA have lower levels of satisfaction, are more price sensitive, complain more and are less loyal to hotel brands and the fictional movie Best Exotic Marigold Hotel.

The literature review findings concluded that the tourism distribution channel plays a vital role in marketing and booking hotels. Roles this channel fulfils are the exchange of information, the bundling of heterogeneous products and the introduction of the buyer and seller. This channel is evolving, mainly due to the influence of the internet, and hotels need to adapt to these changes, or will be left behind.

OTAs and the social media are the latest additions to the distribution channel and are becoming more dominant. Reasons for this dominance are that they are trading on the internet and using the social media, such as guest reviews, to give more credibility to their websites and the products they are featuring. Owing to the power of the internet, OTAs are able to overcome time, distance and place and since it is relatively inexpensive to conduct business on the Internet, they have a competitive advantage over traditional 'brick and mortar' travel agencies.

The preferences and expectations of hotel guests are also changing; they are influenced by quick and easy access to information, reason for visit and changes in tourists' lifestyles. Tangible elements such as the appearance of the physical building, facilities and cleanliness no longer play as important a role as in the past. Intangible elements such as service, convenience and management's 'caring' have become as, if not more, important than the tangible elements.

The literature reviewed refers to the fact that guest satisfaction is not only impacted by the interactions between guests and employees, but also by those among guests. Another factor that influences guests' satisfaction is their experiences. The literature reviewed states that when services are customized, they become experiences. Experiences referred to in this case, should not be confused with past experiences, which also have an impact.

Past experiences play a major role in guest satisfaction, since they create a level of expectation that guests will subsequently use to evaluate the hotel.

From a management perspective, guest satisfaction, particularly quality of service, has become a differentiation tool. Prior to the advent of the social media, service industries such as hotels relied on word-of-mouth marketing to promote good service. The social media have contributed to word-of-mouth marketing, however, it should be noted that reviews could be false.

The dilemmaThe Monarch is facing is that most of the current revenues generated by the hotel are from the internet as this medium produces 68% of rooms occupied. The hotel pays large amounts in commissions and employs a large staff compliment to maintain high service levels. Furthermore, the individuality of guests requires that management and the staff have to continuously adapt their service encounters to meet expectations.

Boutique hotels pride themselves on personalized service. This type of hotel therefore requires the distribution channel to supply information to 'tailormake' a guest's stay. During the booking process, OTAs allow guests to request 'special' information, but include a disclaimer that these requests cannot be guaranteed.

6.2   CONCLUSIONS

The conclusions derived from the personal interviews, confirm the hypothesis that the information supplied by OTAs has an impact on level of guest satisfaction.

Contrary to J.D. Power and Associates' results, the guests interviewed at The Monarch were overwhelmed, rather than underwhelmed with the hotel and its facilities, and the entire experience of staying there. The majority of respondents believed that they received more than they expected. The hotel, facilities and rooms were bigger and better than what the information they perused prior to booking indicated.

Most of respondents expressed a certain level of loyalty to the hotel. They expressed the will to return, and / or recommend the hotel. Two of the respondents were return visitors; however, neither had been introduced to The Monarch by an OTA. The original owners of the hotel and a travel agent, respectively, had introduced them.

Both return visitors would however book directly with the hotel for completely different reasons if given the opportunity. The method of recommending the hotel also varied; some respondents would post reviews, whereas others would use traditional word-of-mouth. Cognizance should be taken that the literature reviewed revealed that recommendations, whether negative or positive, mostly occur for extremes. On Expedia all reviewers recommend The Monarch.

The majority of respondents were complimentary and had few complaints. The negative feedback received from respondents could be attributed to their personal perceptions concerning the hotel and its staff. For example, that the staff uniform looked like that of any other hotel, that the staff looked uncomfortable in their uniform, that all staff members did not have name badges, and that staff were not able to hide their surprise when a married coupled asked for twin beds.

On Booking.com, the Average review (Attitude) rating could also be attributed to the hotel not meeting the specific perception of the reviewer. The researcher believes that this guest may have felt uncomfortable or embarrassed comparing how they were dressed compared with the other guests. This could then possibly have been projected onto the staff, as there is little evidence to support the guest's opinion.

On the other hand, the researcher believes that there is some merit in the Poor review rating on Booking.com, since the hotel policy in 2010 did stipulate 'no

children' and thus rejected the lunch booking. The employee was subsequently asked to leave for the exact reasons the reviewer mentioned in her post.

Although the respondents were price sensitive, this was not the reason they chose The Monarch. The researcher is the opinion that if the hotel had to instead of giving a price upfront, gave the guests the option to suggest a price on checkout (after they had experienced the hotel); they all would have offered a price higher than what they paid. This of course would be impractical for numerous reasons, but the one most applicable is that they all booked via an OTA.

All guests interviewed are frequent users of their respective OTA's used. These guests would then not have stayed at The Monarch, if above promotion was implemented, as on OTA's price plays a major role and the hotel would never offer such a promotion on an OTA, due to people who would abuse this offer. The researcher did however conclude that the hotel should increase the price charged on OTA's as the majority of respondents all got more than what they expected.

However, increasing the price charged on OTAs would not solve the hotel's dilemma of having to pay large amounts of commission to the distribution channel. It would in fact worsen it. Commissions are paid on a percentage basis, thus the higher the price charged, the higher the absolute value of the commission amount.

Guest-guest interaction does have an impact on guest satisfaction. Although the majority of respondents noted that the public facilities were spacious, there are only a limited amount of them and guests tend to interact with each other. The American guest spoke to another guest and was introduced to the in-house procedure to call the general manager Mister Jan and also address regular guests with the same "formal" familiarity. Without this interaction, this guest would not have had something to look forward to for his subsequent visits.

To use the average review on Booking.com as an example, these guests felt uncomfortable at The Monarch due to the clothing they wore, or to be more exact they were intimidated by how the other guests were dressed. These guests were not on a lower rate than other guests, thus it was not question that they could not afford

to stay at The Monarch Hotel. Their reason for visiting South Africa was leisure orientated and thus they dressed accordingly, whereas most of the other guests staying at the hotel were there for business reasons, and were thus dressed more formally.

The same guest who introduced the American to the "Mister" procedure also spoke to other guests who believed that the breakfast service was a bit slow. This specific guest, being a regular, had a relationship with the general manager and could bring this to his attention. Without this guest-guest interaction, the slow service would not have been brought to the general managers attention.

Employee-guest interaction are becoming one of the most important factors in guest satisfaction. In a boutique hotel personalized service is a key differentiator. The interaction between guests and employees occurs on a more regular basis than what it would in a bigger hotel. The literature reviewed refers to the importance of service recovery when service failure occurs. The respondents' feedback gave the researcher the impression that the employees at The Monarch have mastered this.

6.3   RECOMMENDATIONS

The researcher being an employee of the management and marketing company, in an effort to be objective and not being influenced by the current systems and procedures in place, will base recommendations on the information obtained either from the literature review and personal interviews.

6.2.1 Distribution channel

a)   The current market mix being predominantly business orientated should be diversified with a bigger emphasis placed on leisure travellers.

The Monarch is currently losing a large portion of South Africa's tourism market. The hotel is ideally situated and has relatively easy access to the remainder of Johannesburg and the OR Tambo international airport to attract more guests who visit Johannesburg for pleasure. Without lowering the

current rates, The Monarch can compete with hotels in Sandton and those in closer proximity, by being more robust in its marketing approach.

The literature revealed that service should be used as a differentiator. The hotel is currently not putting enough emphasis on this aspect in their marketing approach. The personal interviews established that without a doubt the hotel could use service as a differentiator..

b)   The hotel is too reliant on OTA business (58%) and should focus more on other distribution channel members and its own website.

The problem is that owing to the limited number of barriers to entry, more competition can very quickly appear on these platforms. OTAs generate their revenue via commissions and will always try to increase either the percentage commission they charge, or the volume of business they send to the hotel.

Since price plays an important role on OTAs, they will always maintain that volume trumps value (reflected in columns B and D in Table 6.1 below).

Table 6.1 Rate and volume increase scenarios

	A	B	C	D	E	F
Rate	2000	2000	2200	1900	2000	2300
Rooms sold	10	11	10	12	10	10
Revenue	20000	22000	22000	22800	20000	23000
10% comm	2000	2200	2200	2280		
15% comm						3450
Hotel	18000	19800	19800	20520	20000	19550
Achieved rate	1800	1800	1980	1710	2000	1955

The Monarch has limited availability (12 rooms). The hotel will make more profit if the value of the bookings increases, as column C in Table 6.1 indicates. The OTA also makes more profit, but because there is a greater chance of selling rooms at a lower rate than a higher rate, OTAs give preference to lower priced hotels.

The ideal scenario for the hotel would be column E, where no commissions are given away; however, this will limit the exposure of the hotel and could lead to a reduced number of rooms being sold. There is also a possibility that the hotel could spend more money on advertising and promotions than the current percentage commission they are giving to OTAs.

A good alternative for the hotel would be to approach distribution partners whose clients are not price sensitive, but who are willing to pay a much higher rate (reflected in column F), but these channels require a higher percentage commission. Again there is the possibility that the volume of guests from this channel will not be as great as the volume that the OTAs can provide.

Aggressively promoting more bookings via the hotel's own website, by offering incentives of less value than the current commissions being paid to channel members, should also be pursued. The benefit would that the hotel would yield a better rate and the client will also benefit.

Ideally, the hotel should try to put itself in a position that if it loses volume from the OTAs, the value it generates from other distribution partners will make up for this loss.

c)   The current hotel rate should be increased to be more in line with the quality and service it is offering.

The impact of price increases on volume was discussed at length in point b) (above). If the researcher had to exclude what was discussed in point b), and look solely at the information generated by the literature review and subsequent interviews, it would be concluded that because of the service and quality of the hotel, the price should be increased. The "low" price being charged, creates a lower expectation level as all guests got more than what they expected.

By increasing the rate and taking point b) into consideration, diversifying the channel members would become a necessity and the hotel would receive the overall benefit.

d)   The hotel's marketing material, such as photographs, should be updated to provide a better reflection of the hotel.

All the respondents who read the reviews posted on TripAdvisor, Booking.com and Expedia indicated that the hotel is being undersold rather than oversold. By updating the marketing material, the achievement of points a), b) and c) (above) could be a natural occurrence and not require special effort.

e)   The hotel should make use of the good reviews posted on TripAdvisor, Expedia and Booking.com.

The hotel should use the reviews posted by satisfied guests whenever and wherever possible. These reviews could endorse a higher rate being charged and confirm that the hotel's marketing material does not overstate the hotel's quality.

f)   The hotel should implement a loyalty programme

Two of the respondents were return visitors and would consider booking directly with the hotel in future. Another respondent, who will be visiting Johannesburg on a more regular basis, has already made an enquiry for a regular guest rate. The researcher found a review on Expedia by guests who have stayed at The Monarch more than once

Starting a loyalty programme where guests book directly with the hotel, will result in the hotel not paying commissions to OTAs, or other channel members. Guests will think of the hotel first before looking at other options. These guests could become additional marketers of the hotel.

Alternatively, if the hotel does not want to create a loyalty programme, literature should be placed in guests' rooms and on the hotel's website stating that if bookings are made directly with the hotel, guests will receive a discount or additional benefits.

6.3.2 Guest Satisfaction

The recommendations for guest satisfaction are related to the findings from the literature review, personal interviews and based on the recommendations made in the previous section.

a)   All staff should be given name badges and a system should be put in place to ensure that they wear them all the time and that when staff meet guests they introduce themselves.

Very few employees were mentioned by name, and the reason could be that some of the staff possibly did not wear their name badges. Alternatively these badges were too small and thus the guests could not read the names. The staff possibly also did not introduce themselves when they met the guests for the first time.

b)   The courtyard area of the hotel should be used more frequently.

This facility, as pointed out by one of the guests interviewed, could be utilized better and more. During the breakfast service and at lunch, guests could also be seated in the courtyard.

c)   The hotel should become more leisure guest friendly.

As indicated in the recommendations for the tourism distribution channel, market diversification is needed to make the hotel less reliant on business travellers. Currently there is not a strong enough focus on the hotel's own website, nor on what there is to do in the proximity of the hotel.

Information that would bring an additional dimension to the hotel is a Johannesburg events calendar, that Sandton City is only five minutes away via the Gautrain, that city tours can be arranged through a reputable tour company, and that the Apartheid Museum is 20 minutes away. Promotional packages that include a show should also be developed and placed on the hotel's website. This will optimise the website on search engines.

More literature illustrating activities in Johannesburg and surrounding areas should be placed in the guests rooms and public areas. By having more leisure guests, the situation where guests felt that they did not belong, will not re-occur.

d)   A return visitor programme should be implemented.

The literature revealed that guests should be surprised, and a return visitor who was upgraded to a better room confirmed this statement. This, however, is subject to the availability of better rooms, and thus cannot be offered at all times.

Boxes of chocolates, bottle of wine, complimentary dinners or transfers will not surprise guests, as this has become the norm. Offering return guests a special turn down service with a miniature chocolate brownie, or Crème Brule, in addition to the above could make for a memorable experience.

On a recent business trip to Dubai, the researcher was presented with a small cake decorated with a photo of himself when he first entered his room. This 'special gesture' might be extravagant for The Monarch, but a similar kind of personalization should be aimed for.

e)   Staff should be trained regularly.

Although the feedback received and reviews evaluated indicated that the staff is competent and capable, a return visitor made mention of the noticeable progress the staff had made since his first visit. The American guest noted

that the staff was struggling with the different terminologies used by the various guests, and this aspect which should also be attended to.

The training should be for skills such as greeting guests in their home language, and knowing for example that ketchup is tomato sauce, the metro is the Gautrain, a cab is a taxi, etcetera. Another skill that would benefit is knowing something of other cultures. Over the period of the interviews, there were guests from eight different nationalities staying at the hotel.

6.4 RECOMMENDATIONS FOR FUTURE RESEARCH

This study was limited to only a small portion of the potential relationship between the tourism distribution channel and guest satisfaction. Further analysis into each of the distribution channel members and guest satisfaction over a wider spectrum of hotels would add value.

Any future guest sample should be more random, the research period should be longer and sourcing respondents should not be assisted by a stakeholder who is directly involved. This will assist in determining if the service levels are consistent.

Reviews posted on Web 2.0 applications such as TripAdvisor and on OTAs such Booking.com and Expedia should be analysed in more detail. The nuances within these reviews could assist in establishing the evolution of guest satisfaction and guide hotel general managers to better serve the needs of their guests.

Establishing the impact OTAs have on the revenue streams of hotels, whether to generate additional revenue or dilute the achieved price per room would be advantageous for the management and marketing divisions. An analysis of the search and decision making processes of guests on the internet would assist marketing departments in tailoring their promotional campaigns to reach the right clientele.

6.5   FINAL REMARKS

The study achieved the objective the researcher set out to accomplish by establishing that the information provided by Online Travel Agents has an impact on guest satisfaction.   Contrary to the initial information gathered, prior to the commencement of the literature review and personal interviews, guest satisfaction at The Monarch hotel was higher than the expectation created by these Online Travel Agents.

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Subject: Monarch Hotel - Customer Satisfaction Survey - Reminder

Date: Wednesday 17 September 2014 at 09:53:48 South Africa Standard Time

From: Monarch Hotel (sent by <no-reply@eguestsurv.divtech.co.za>)

To: ignus.leroux@mantiscollection.com

English | German | French | Italian | Spanish | Portuguese | Zulu | Tswana

★ ★ ★ ★ ★

Online Customer Satisfaction Survey Invitation	17-Sep-2014

Dear Ignus le Roux,

Hello again! We recently sent you an invitation to complete our online Customer Satisfaction Survey, and have noticed that you have not yet completed the survey.

We value our guest feedback and would really appreciate it if you could take 3 minutes to complete the survey. Please note that you will not receive another reminder.

Guest feedback about our product and service is very important to us, and enables us to learn about things that we are doing right and where we still need to improve.

To achieve this we need your assistance and we kindly ask that you take a few minutes to complete our short online customer satisfaction survey by clicking on the link below.

Click here » Monarch Hotel

At the end of this survey we will give you the opportunity to share your feedback on tripadvisor, the world's largest travel community. We find that many fellow travellers value the advice given on the site and will appreciate your opinion!

We thank you in advance for your kind assistance and hope to welcome you back very soon.

Kind Regards

Monarch Hotel

Privacy Policy | Instant Unsubscribe | Powered by eGuestSurv

Monarch Hotel - Monthly Analytics Report

Diversified Technologies

Establishment

	Month		3 Month		12 Month		
	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Goal
Establishment	96.76	19	94.73	49	94.11	127	90.00
Brand - Mantis Collection	94.18	114	94.30	271	93.04	895	90.00
Group	94.18	114	94.30	271	93.04	895	-

	Variances				
	Month vs 3 Month	Month vs 12 Month	Month vs Goal	3 Month vs Goal	12 Month vs Goal
Establishment	2.03 ⇑	2.65 ⇑	6.76 ⇑	4.73 ⇑	4.11 ⇑
Brand - Mantis Collection	- 0.12 ⇓	1.14 ⇑	4.18 ⇑	4.30 ⇑	3.04 ⇑
Group	- 0.12 ⇓	1.14 ⇑	-	-	-

24 Month Trend Analysis

	September		October		November		December		January		February		March		April		May		June		July		August	
	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp
Curr-12Mth	86.44	9	94.96	12	97.03	12	94.86	4	91.33	10	97.85	8	95.50	6	86.94	9	99.24	8	93.77	17	93.10	13	96.76	19
Prev-12Mth																	96.92	4	96.50	8	82.33	3	92.07	9

Year over Year Monthly Trend Analysis
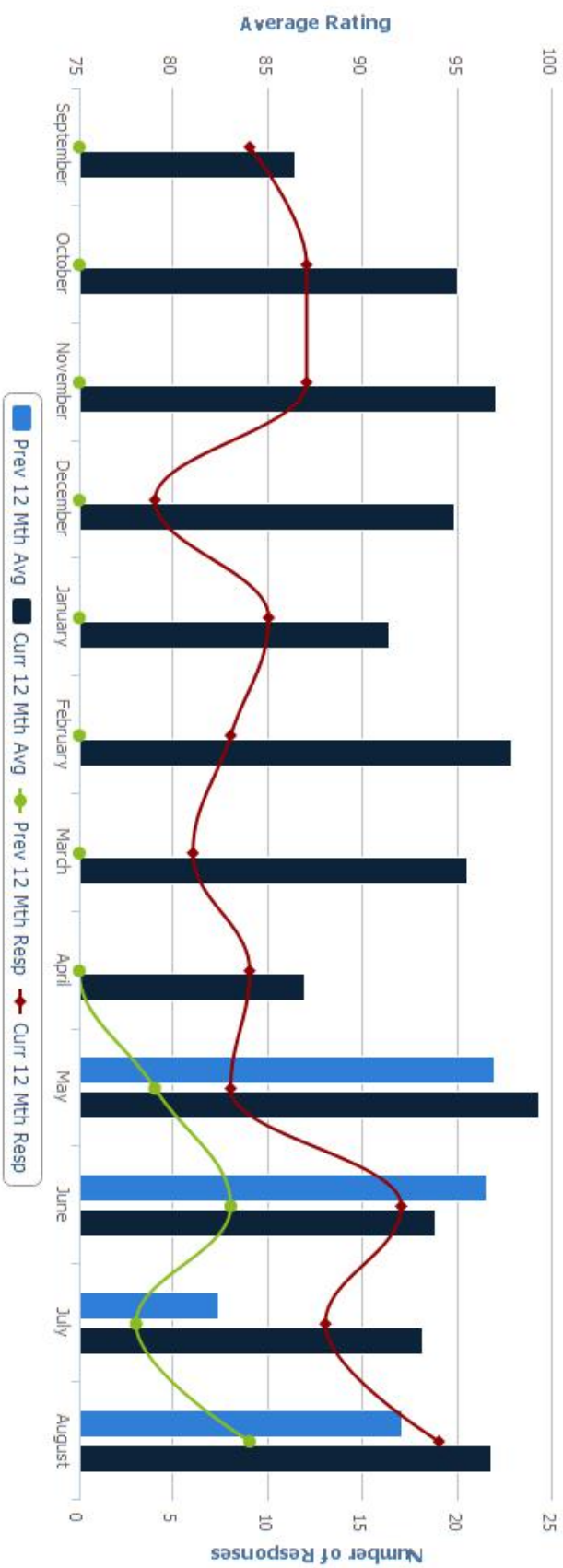
Benchmarks

	Month Avg (%)	3 Month Avg (%)	12 Month Avg (%)
Five Star	91.74	91.85	91.26
Five Star - City Hotel	90.44	90.32	89.50
Five Star - City Hotel - Gauteng	90.37	89.54	88.87

Variances

	Month vs 3 Month	Month vs 12 Month
Five Star	- 0.11 ⇓	0.48 ⇑
Five Star - City Hotel	0.12 ⇑	0.94 ⇑
Five Star - City Hotel - Gauteng	0.83 ⇑	1.50 ⇑

Surveys

eGuestSurv - Standard with No Activities (v1)

	Avg (%)	No. Resp
Month	96.76	19
3 Month	94.73	49
12 Month	94.11	127
Goal	90.00	

Variances

Month vs 3 Month	2.03 ⇑
Month vs 12 Month	2.65 ⇑-
Month vs Goal	6.76 ⇑
3 Month vs Goal	4.73 ⇑
12 Month vs Goal	4.11 ⇑

24 Month Trend Analysis

eGuestSurv - Standard with No Activities (v1)

	September		October		November		December		January		February		March		April		May		June		July		August	
	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp
Curr-12Mth	86.44	9	94.96	12	97.03	12	94.86	4	91.33	10	97.85	8	95.50	6	86.94	9	99.24	8	93.77	17	93.10	13	96.76	19
Prev-12Mth																	96.92	4	96.50	8	82.33	3	92.07	9

Categories

Categories	Month		3 Month		12 Month			Variances				
	Avg (%)	No. Resp	Avg (%)	No. Resp	Avg (%)	No. Resp	Goal	Month vs 3 Month	Month vs 12 Month	Month vs Goal	3 Month vs Goal	12 Month vs Goal
Housekeeping	98.82	17	97.33	45	96.59	123	90.00	1.49 ⇑	2.23 ⇑	8.82 ⇑	7.33 ⇑	6.59 ⇑
Loyalty	97.78	18	95.83	48	95.20	123	90.00	1.95 ⇑	2.58 ⇑	7.78 ⇑	5.83 ⇑	5.20 ⇑
Value	97.65	17	94.35	46	93.42	120	90.00	3.30 ⇑	4.23 ⇑	7.65 ⇑	4.35 ⇑	3.42 ⇑
Reception	97.11	19	94.59	49	94.10	127	90.00	2.52 ⇑	3.01 ⇑	7.11 ⇑	4.59 ⇑	4.10 ⇑
Room	96.32	19	94.69	49	95.24	126	90.00	1.63 ⇑	1.08 ⇑	6.32 ⇑	4.69 ⇑	5.24 ⇑
Experience	96.32	19	94.29	49	93.50	123	90.00	2.03 ⇑	2.82 ⇑	6.32 ⇑	4.29 ⇑	3.50 ⇑
Hospitality	95.68	19	94.64	49	93.94	127	90.00	1.04 ⇑	1.74 ⇑	5.68 ⇑	4.64 ⇑	3.94 ⇑
Food & Beverage	95.29	17	92.39	46	90.85	117	90.00	2.90 ⇑	4.44 ⇑	5.29 ⇑	2.39 ⇑	0.85 ⇑

24 Month Trend Analysis

Month	September		October		November		December		January		February		March		April		May		June		July		August	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Housekeeping																								
Curr-12Mth	92.22	9	98.33	12	98.33	12	97.50	4	97.50	10	98.33	8	87.78	6	100.00	8	96.25	8	96.67	16	98.82	12	98.82	17
Prev-12Mth																								
Loyalty																								
Curr-12Mth	98.00	10	98.33	12	98.33	12	97.50	4	90.00	10	96.67	8	85.00	6	97.50	4	91.25	7	93.85	13	97.65	17	97.78	18
Prev-12Mth																								
Value																								
Curr-12Mth	85.56	10	90.00	10	90.00	12	95.56	4	97.50	9	96.67	8	88.89	9	95.00	4	94.38	4	97.50	8	93.75	13	97.65	17
Prev-12Mth																								
Reception																								
Curr-12Mth	84.71	12	98.26	12	97.50	12	100.00	4	91.00	10	96.67	8	85.88	8	94.00	8	92.94	8	93.08	13	97.11	13	97.11	19
Prev-12Mth																								
Room																								
Curr-12Mth	93.33	9	99.09	11	96.67	12	98.75	4	94.00	10	96.67	6	86.67	6	98.75	8	92.94	8	94.62	13	96.32	13	96.32	19
Prev-12Mth																								
Experience																								
Curr-12Mth	82.22	9	95.83	12	95.83	12	93.33	3	89.00	10	95.00	8	87.78	6	97.50	4	96.67	4	93.33	8	97.50	3	96.32	19
Prev-12Mth	82.22	9	97.78	9																				9
Hospitality																								
Curr-12Mth	88.24	9	92.50	12	96.25	12	97.50	4	90.00	10	98.67	8	95.83	6	86.67	9	100.00	8	95.29	17	92.31	13	95.68	19
Prev-12Mth																								

Food & Beverage

Prev-12Mth										100.00	4	97.50	8

	Curr-12Mth																						
	76.25	8	90.83	12	97.27	11	86.67	3	86.67	9	93.75	8	90.00	6	88.33	6	93.75	8	95.00	16	85.38	13	95.29	117

Prev-12Mth							
	90.00	4	95.00	8	76.67	3	85.00	8

88.33	3	93.53	9

Housekeeping - Year over Year Monthly Trend Analysis
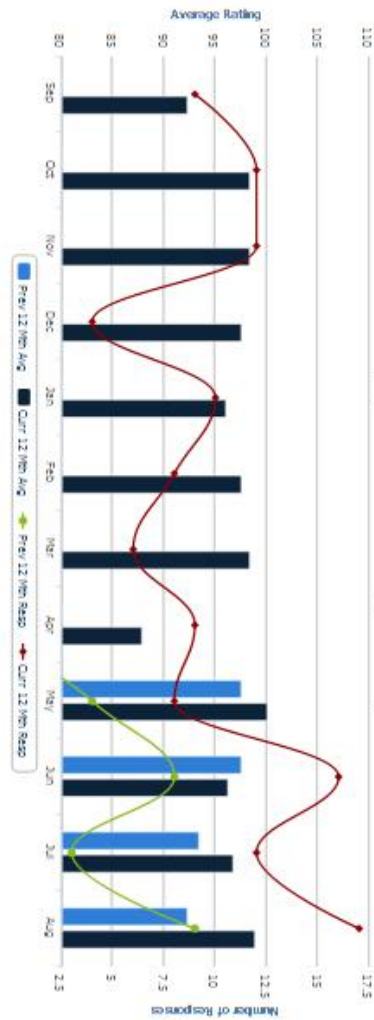
Value - Year over Year Monthly Trend Analysis

Room - Year over Year Monthly Trend Analysis
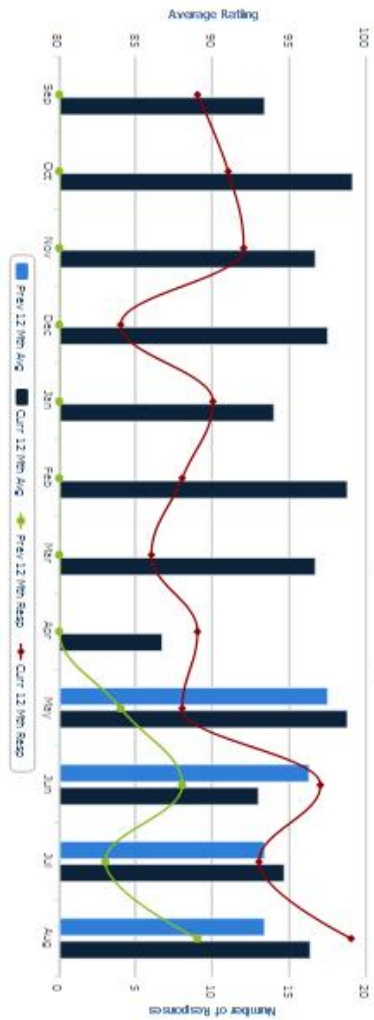
Loyalty - Year over Year Monthly Trend Analysis
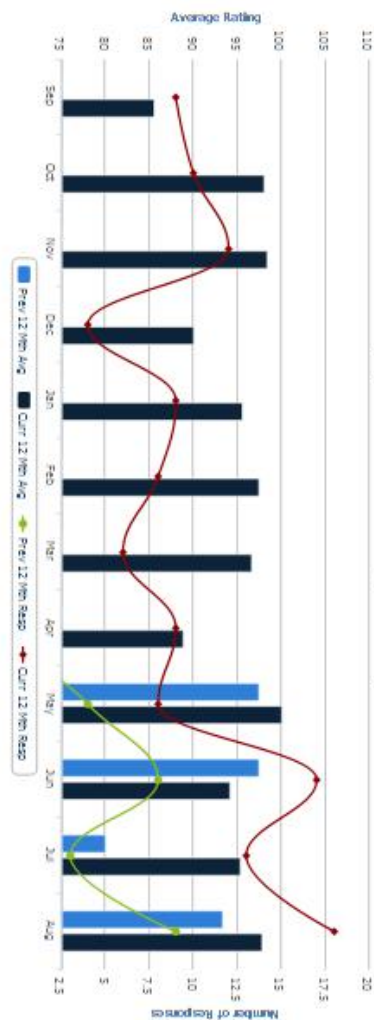
Reception - Year over Year Monthly Trend Analysis
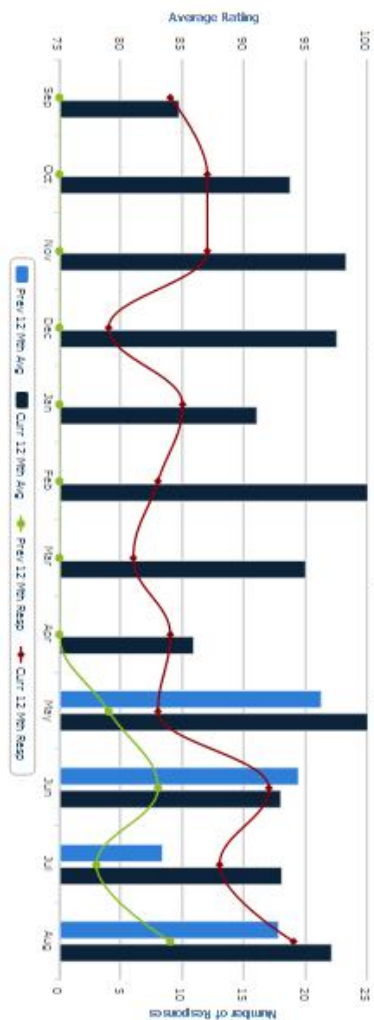
Experience - Year over Year Monthly Trend Analysis
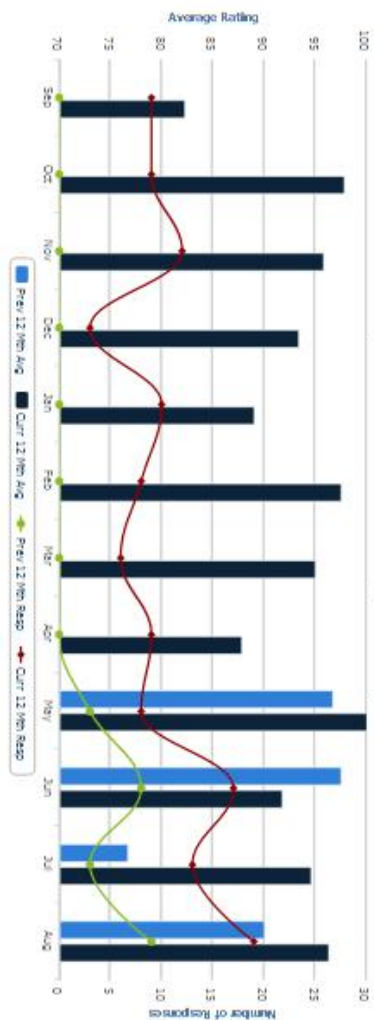
Hospitality - Year over Year Monthly Trend Analysis

Legend: Prev 12 Mth Avg | Curr 12 Mth Avg | Prev 12 Mth Resp | Curr 12 Mth Resp
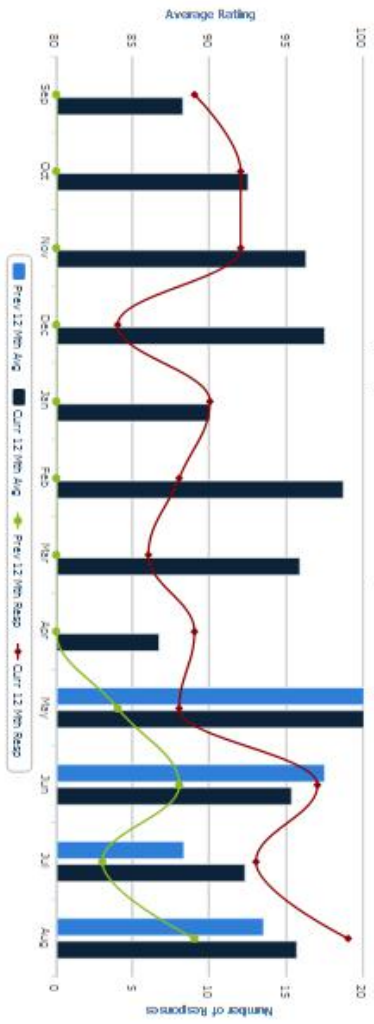
Food & Beverage - Year over Year Monthly Trend Analysis
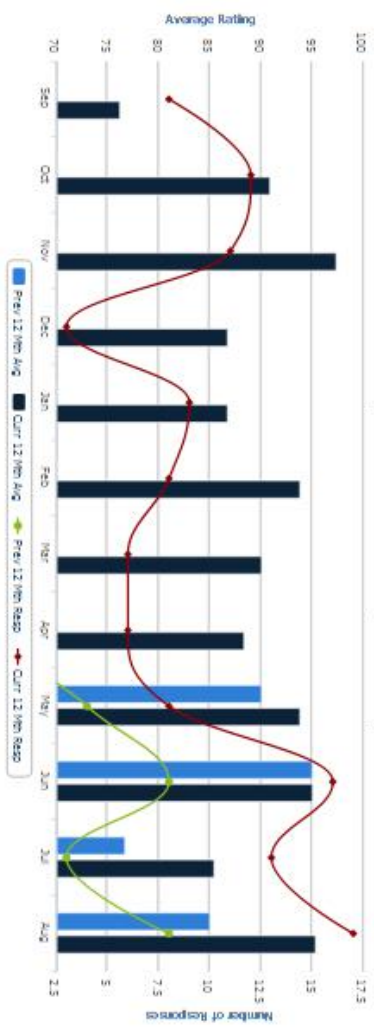
Legend: Prev 12 Mth Avg | Curr 12 Mth Avg | Prev 12 Mth Resp | Curr 12 Mth Resp

Statements

Statement	Month Avg (%)	Month No. Resp	3 Month Avg (%)	3 Month No. Resp	12 Month Avg (%)	12 Month No. Resp	Goal	Month vs 3 Month	Month vs 12 Month	Month vs Goal	3 Month vs Goal	12 Month vs Goal
The room was clean.	98.82	17	97.33	45	96.59	123	90.00	1.49 ⇑	2.23 ⇑	8.82 ⇑	7.33 ⇑	6.59 ⇑
The check in process was efficient.	97.89	19	95.71	49	94.49	127	90.00	2.18 ⇑	3.40 ⇑	7.89 ⇑	5.71 ⇑	4.49 ⇑
The staff was friendly and willing to help.	97.78	18	95.42	48	95.20	125	90.00	2.36 ⇑	2.58 ⇑	7.78 ⇑	5.42 ⇑	5.20 ⇑
I enjoyed my stay and would recommend it to others.	97.78	18	95.83	48	95.20	123	90.00	1.95 ⇑	2.58 ⇑	7.78 ⇑	5.83 ⇑	5.20 ⇑
I received value for money.	97.65	17	94.35	46	93.42	120	90.00	3.30 ⇑	4.23 ⇑	7.65 ⇑	4.35 ⇑	3.42 ⇑
The overall experience met my expectations.	96.32	19	94.29	49	93.50	123	90.00	2.03 ⇑	2.82 ⇑	6.32 ⇑	4.29 ⇑	3.50 ⇑
My checkout was accurate and efficient.	96.32	19	93.47	49	93.71	124	90.00	2.85 ⇑	2.61 ⇑	6.32 ⇑	3.47 ⇑	3.71 ⇑
The room layout and furnishings met my expectations.	96.32	19	94.69	49	95.24	126	90.00	1.63 ⇑	1.08 ⇑	6.32 ⇑	4.69 ⇑	5.24 ⇑
The quality of the food met my expectations.	95.29	17	92.39	46	90.85	117	90.00	2.90 ⇑	4.44 ⇑	5.29 ⇑	2.39 ⇑	0.85 ⇑
The service on arrival was welcoming.	93.68	19	93.88	49	92.70	126	90.00	- 0.20 ⇓	0.98 ⇑	3.68 ⇑	3.88 ⇑	2.70 ⇑

24 Month Trend Analysis

I enjoyed my stay and would recommend it to others.

	Sep		Oct		Nov		Dec		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Curr-12Mth	83.75	8	98.00	10	98.33	12	90.00	4	97.50	9	96.67	8	96.67	6	88.89	9	100.00	8	94.12	17	95.38	13	97.78	18
Prev-12Mth	86.25	8	94.55	11	95.00	12	90.00	3	96.25	8	96.67	6	85.00	8	88.75	8	97.50	4	91.25	16	80.00	3	93.33	9

I received value for money.

	Sep		Oct		Nov		Dec		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Curr-12Mth	80.00	8	97.78	9	95.83	12	93.33	3	89.00	10	95.00	8	89.00	6	87.78	9	96.67	3	90.00	8	76.67	3	97.65	17
Prev-12Mth	86.25	8													85.00	8	97.50	4	60.00	8	76.67	3	90.00	9

My checkout was accurate and efficient.

	Sep		Oct		Nov		Dec		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Curr-12Mth	80.00	8	93.33	12	98.18	11	97.50	4	90.00	10	96.67	8	90.00	6	88.75	8	100.00	8	91.76	17	93.85	13	96.32	19
Prev-12Mth			95.00	12	97.50	4			90.00	10	90.00	6	95.00	4	93.00	6	92.50	4	93.75	8	80.00	3	92.22	9

The check in process was efficient.

	Sep		Oct		Nov		Dec		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Curr-12Mth	87.50	8	94.17	12	98.33	12	97.50	4	89.00	10	95.00	8	83.33	6	88.75	8	100.00	8	94.12	17	94.62	13	97.89	19
Prev-12Mth			98.33	12	97.50	4			89.00	10	95.00	6			89.00	4	100.00	4	95.00	8	76.67	3	93.33	9

The overall experience met my expectations.

	Sep		Oct		Nov		Dec		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Curr-12Mth	80.00	8	97.78	9	95.83	12	93.33	3	89.00	10	95.00	8	87.78	6	87.78	9	100.00	8	91.76	17	94.62	13	96.32	19
Prev-12Mth			95.83	12											89.00	4	92.50	4	95.00	8	76.67	3	93.75	8

The quality of the food met my expectations.

	Sep		Oct		Nov		Dec		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug	
	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat	Avg (%)	Stat
Curr-12Mth	72.86	7	90.83	12	97.27	11	86.67	3	93.75	9	86.67	6	88.33	6	88.33	6	90.00	4	85.38	16	96.32	13	95.29	17
Prev-12Mth					86.67	9	93.75	4			90.00	6			88.33	6	90.00	4	95.00	8	90.00	3	85.00	8

The room layout and furnishings met my expectations.

Period												Total
Curr-12Mth	92.50 (8)	99.09 (11)	96.67 (12)	97.50 (4)	94.00 (10)	98.75 (8)	96.67 (6)	86.67 (9)	98.75 (8)	92.94 (17)	94.62 (13)	96.32 (119)
Prev-12Mth												93.33 (9)

The room was clean.

Period												Total
Curr-12Mth	91.25 (8)	98.33 (12)	98.33 (12)	97.50 (4)	96.00 (10)	97.50 (8)	87.78 (9)	100.00 (8)	96.25 (16)	93.33 (12)	98.82 (117)	
Prev-12Mth				97.50							92.22 (9)	

The service on arrival was welcoming.

Period												Total
Curr-12Mth	85.00 (8)	90.83 (12)	94.17 (12)	97.50 (4)	87.00 (10)	98.57 (7)	95.00 (9)	97.50 (8)	85.56 (9)	100.00 (8)	94.71 (17)	93.08 (13) · 93.68 (119)
Prev-12Mth				97.50 (4)	96.00 (6)			98.33 (8)		97.50 (4)	96.25 (8)	93.33 (3) · 92.22 (9)

The staff was friendly and willing to help.

Period												Total
Curr-12Mth	90.00 (7)	94.17 (12)	98.33 (12)	97.50 (4)	93.00 (10)	98.75 (8)	96.67 (6)	87.78 (9)	100.00 (8)	95.88 (17)	91.54 (13)	97.78 (18)
Prev-12Mth									100.00 (4)	96.25 (8)	90.00 (3)	93.75 (8)

Net Promoter Score

Net Promoter Score

	Month				3 Month				12 Month			
	Promoters (%)	Detractors (%)	NPS (%)	No. Resp	Promoters (%)	Detractors (%)	NPS (%)	No. Resp	Promoters (%)	Detractors (%)	NPS (%)	No. Resp
	100.00	0.00	100	18	89.58	0.00	89.58	122	90.16	3.28	86.88	122

NPS (%) Variance

Month vs 3 Months	Month vs 12 Months
10.42 ⇑	10.42 ⇑

24 Month Trend Analysis

Month	NPS (%)	No. Resp
September	37.50	8
October	100.00	10
November	100.00	12
December	50.00	4
January	88.89	9
February	87.50	8
March	100.00	6
April	77.78	9
May	100.00	8
June	82.35	17
July	84.62	13
August	100.00	18

Net Promoter Score

	September		October		November		December		January		February		March		April		May		June		July		August	
	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp	NPS (%)	No. Resp
Curr-12Mth	37.50	8	100.00	10	100.00	12	50.00	4	88.89	9	87.50	8	100.00	6	77.78	9	100.00	8	82.35	17	84.62	13	100.00	18
Prev-12Mth																	100.00	4	100.00	8	33.33	3	88.89	9

Net Promoter Score

NPS - Year over Year Monthly Trend Analysis

Legend: Prev 12 Mth NPS, Curr 12 Mth NPS

Feedback Loops

Establishment

No. of Submitted Surveys Requiring a Response	No. of Surveys Responded To	No. of Outstanding Responses	Outstanding Responses (%)
8	8	0	0.00

24 Month Trend Analysis

	September		October		November		December		January		February		March		April		May		June		July		August	
	Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops		Feeback Loops	
	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open	Opened	Open
Curr-12Mth	6		11		4		2		5		4		5		6	1	4	3	8	1	7	2	8	5
Prev-12Mth																								

Key Drivers of Loyalty

	Month			Previous Month			Rank Move
	Avg (%)	No. Resp	Rank	Avg (%)	No. Resp	Rank	
The room was clean.	98.75	16	1	97.00	10	2	1 ⇑
The check in process was efficient.	97.78	18	2	96.36	11	3	1 ⇑
The staff was friendly and willing to help.	97.65	17	3	96.36	11	4	1 ⇑
I received value for money.	97.50	16	4	95.45	11	7	3 ⇑
The overall experience met my expectations.	96.67	18	5	96.36	11	5	0
The room layout and furnishings met my expectations.	96.67	18	6	95.45	11	8	2 ⇑
My checkout was accurate and efficient.	96.11	18	7	97.27	11	1	-6 ⇓
The quality of the food met my expectations.	95.00	16	8	89.09	11	9	1 ⇑
The service on arrival was welcoming.	94.44	18	9	95.45	11	6	-3 ⇓

Response Rates

	Month	3 Month	12 Month	Month vs 3 Month	Month vs 12 Month
No. Surveys Delivered	77	170	419		
No. Surveys Undelivered	3	6	24		
Total Surveys Sent	80	176	443		
No. Respondants	19	49	127		
No. Non-Respondants	58	121	292		
Total Surveys Delivered	77	170	419		
Undelivered (%)	3.75	3.41	5.42	0.34 ⇑	- 1.67 ⇓
Reponse Rate (%)	24.68	28.82	30.31	- 4.15 ⇓	- 5.63 ⇓

24 Month Trend Analysis

No. Surveys Sent

	September	October	November	December	January	February	March	April	May	June	July	August
Month	32	38	44	15	20	38	21	30	29	46	50	80

Undelivered (%)

	September (%)	October (%)	November (%)	December (%)	January (%)	February (%)	March (%)	April (%)	May (%)	June (%)	July (%)	August (%)
Curr-12Mth	18.75	15.79	9.09			2.63	4.76		4.35	2.00	3.75
Prev-12Mth									11.76	16.67	23.53	6.90

Reponse Rate (%)

	September (%)	October (%)	November (%)	December (%)	January (%)	February (%)	March (%)	April (%)	May (%)	June (%)	July (%)	August (%)
Curr-12Mth	34.62	37.50	30.00	26.667	50.00	21.62	30.00	30.00	27.59	38.64	26.53	24.68
Prev-12Mth									26.67	45.00	23.08	33.33

Opt In

No. Opt In's

Month	3 Month	12 Month
3	9	36

24 Month Trend Analysis

No. Opt In's

	September	October	November	December	January	February	March	April	May	June	July	August
Curr-12Mth	3	5	3	3	3	2	2	4	2	1	5	3
Prev-12Mth									3	1	1	4

User Access

Name	Month No. Logins	3 Month No. Logins	12 Month No. Logins
Abigail Marais	0	0	2
Jan van As	16	36	77
Stiera Coetzee	58	114	114
Total	74	150	193

24 Month Trend Analysis

	September	October	November	December	January	February	March	April	May	June	July	August
Abigail Marais												
Curr-12Mth												
Prev-12Mth												
Jan van As,												
Curr-12Mth	3	7	2	5	5	2	3	12	2	14	6	16
Prev-12Mth							2		5	5	3	4
Mpho Musweswe												
Curr-12Mth									1	1		
Prev-12Mth												
Stiera Coetzee												
Curr-12Mth										4	52	58
Prev-12Mth												

	Month	3 Month	12 Month
No. High Rating Notifications	15	33	80
No. Low Rating Notifications		6	15
No. Critical Low Rating Notifications			1

24 Month Trend Analysis

	September	October	November	December	January	February	March	April	May	June	July	August
No. High Rating Notifications												
Curr-12Mth	2	7	9	3	4	7	3	4	8	10	8	15
Prev-12Mth									3	6	3	3
No. Low Rating Notifications												
Curr-12Mth	4	1		1	2			1		3	3	1
Prev-12Mth											2	1
No. Critial Low Rating Notifications												
Curr-12Mth								1				
Prev-12Mth												

Report Notes

General
3 Month rolling scores include reported month.
Establishments included in Monthly Analytics Report:
1. Monarch Hotel
All results are based on service date(not the survey submitted dates).
24 Month Trend Analysis runs from current month back 12 months from right to left.
Categories will include all categores regardless of exclutions
Statement will include all startments regardless of exclutions
For more details about this report please download the user manual at: User Manual

Addendum D - Questionnaire

	Section A	Why I am asking this question?
1	Country of origin?	Important to establish if certain nationalities are more comfortable than other in making use of OTA's
2	How did you hear about The Monarch, or did you know about The Monarch prior to visiting the online travel agent website?	It is important to know if the guest specifically looked for the hotel or if the OTA "sold" the hotel to him or her and this is based on only guests who made bookings via an OTA will be interviewed
3	What was the reason for your visit? Leisure, Business, other?	Research indicate that Leisure and Business guest look for different attributes when choosing a hotel
4	Have you stayed at the hotel before, if yes how did you make your 1st booking?	Knowing if a guest stayed at the hotel before and how this previous booking was made is important as it will assist in answering the question why a OTA was chosen to make the next booking
5	Did you do more research on the Hotel prior to you making your reservation and which mediums did you use? (Internet, Travel Agent, brochures, Friends)	Important to know this as there could have been multiple other channels available to make the reservation
6	Did you compare prices for this hotel from various sources and why did you still opt for The Monarch although there are cheaper as well as more expensive options available?	Important to know why the Hotel was chosen
7	Why Did you choose _____ OTA to make your reservation?	Important to note, as various OTA's market themselves differently, but all have the same rate for hotels, but could use different exchange rates or have different payment and cancellation policies
	Section B	
1	Did the general appearance of the hotel and facilities match your expectations created by the information supplied to you by the OTA?	Important to know if what the guest expected, was delivered upon
2	Did the facilities in your room and of the hotel match your expectations created by the information supplied to you by the OTA?	Important to know if what the guest expected, was delivered upon and as per above the reason for the visit could have an impact on this answer.
3	Did the general appearance of the staff meet your expectations ?	Important to know if what the guest expected, was delivered upon
4	Was the service you received from the staff friendly, efficient and consistent?	Important to know if what the guest expected, was delivered upon and this according to research is where satisfaction levels differ?
5	Were the staff competent, knowledgeable, responsive and understanding of your needs?	Staff at a hotel according to research is a key driver of guest satisfaction
6	Did the staff make you feel special?	This according to research is key driver for a guest to either return or recommend the product
7	What did you enjoy the most about your stay?	Important as this could be used in marketing collateral
	Section C	
1	Will you return to the hotel and why?	If he she will return, it would be better to make the booking direct with the hotel so that the hotel can save on the commission it pays to the OTA
2	Will you recommend the hotel to family, friends or colleagues - why?	Similar to above
3	Will you post a review on a travel review website such as Tripadvisor or Virtual tourist?	Social media has become very important in the marketing of a hotel.
4	What will you remember about your stay?	Similar to question 7 in Section B

MONARCH

★ ★ ★ ★ ★

Thank you for taking the time to complete our Customer Satisfaction Survey, we value your feedback.

This survey provides a set of statements that describe different aspects of your stay at our establishment. To complete the survey, please indicate the extent to which you agree or disagree with each of the below statements.

Thank you for your participation.

Guest Name:

Ignus le Roux

Guest Email Address:

ignus.leroux@mantiscollection.com

Hotel:

Monarch Hotel

Date of Stay:

09-Sep-2014

» The service on arrival was welcoming.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» The check in process was efficient.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» The room layout and furnishings met my expectations.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» The room was clean.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» The quality of the food met my expectations.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» The staff was friendly and willing to help.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» My checkout was accurate and efficient.

☺ Strongly Agree   Strongly Disagree ☹

| 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | NA |

» I received value for money.

☺ Strongly Agree   Strongly Disagree ☹

○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
10 9 8 7 6 5 4 3 2 1 NA

» The overall experience met my expectations.

☺ Strongly Agree   Strongly Disagree ☹

○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
10 9 8 7 6 5 4 3 2 1 NA

» I would recommend this hotel to my friends, family or colleagues.

☺ Strongly Agree   Strongly Disagree ☹

○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
10 9 8 7 6 5 4 3 2 1 NA

We are constantly striving to be more environmentally friendly. Please give us your suggestions on how we can improve on our efforts so that we can make a meaningful difference.

Comments/Suggestions:

☐ Yes! I would like to receive email communications, including special offers, news and events.

☐ Yes! I would like someone to respond to me with regards to my comments or survey.

☐ Yes! My comments and ratings may be published on the company website, social media sites and affiliated websites.

☐ Yes! I would like to complete a ◎◎ trip**advisor**· review.

By clicking the Submit Survey button, you have read and agree to the terms of our Privacy Policy (privacy-policy.cfm?
0401054E54555E57425C554E12030C0755524651545B5946430001054E53524E12050C07555945555A4E0D1A015E5947160C0755524A545B).

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Survey

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| Privacy Policy (privacy-policy.cfm?
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trip**advisor**·
OFFICIAL PARTNER

Addendum E

Section A

Respondent	Country of origin?	How did you hear about The Monarch, or did you know about The Monarch prior to visiting the online travel agent website?	What was the reason for your visit? Leisure, Business, other?	Have you stayed at the hotel before, if yes how did you make your 1st booking?	Did you do more research on the Hotel prior to you making your reservation and which mediums did you use? (Internet, Travel Agent, brochures, Friends)	Did you compare prices for this hotel from various sources and why did you still opt for The Monarch although there are cheaper as well as more expensive options available?	Why Did you choose _____ OTA to make your reservation?	Additional comment/observations
1	SA	Friend Recommended The Monarch after staying a couple of weeks ago, whilst in Johannesburg for business.	Business, meetings were in Rosebank and Sandton and with the Gautrain so close, the hotel was very convenient.	1st time	Yes, looked on the hotel's and mantiscollection website after recommendation by friends.	Yes did compare prices, but because a friend recommended the hotel, price was not a consideration as did not want to book cheaper accommodation	Booking.com, was very easy to use and when searching on the internet for the Monarch, this website was almost always shown for all search enquiries.	Researcher got the impression that respondent did not want to give his friend the impression that he could not afford the hotel.
2	SA	Saw an advert in a magazine at an airport lounge and decided to try it out as normally staying at another hotel in same area as The Monarch and the price is almost the same.	Leisure, visiting kids as it was the eldest son's birthday.	1st time	Yes, looked on tripadvisor as well as on the hotels website.	Yes, did compare prices, but the price was very similar to the hotel normally frequented.	Booking.com, always use Booking.com to make hotel reservations as almost all websites have the same rate	Researcher verified this comment with the GM and he conformed that it is the case, a part of the contract signed with Booking.com is that they always need to get the lowest rate, but the other OTA's also have this clause in their contract, so all of them are given the same rate, unless there are special promotions with strict terms and conditions.
3	UK	Stayed at the Monarch before and was originally introduced to the hotel by a Travel Agent when working for a previous company	Business, company has an office in Rosebank and comes to Johannesburg very 3 months	3rd time, booked via a travel agent the 1st time, but with new company doing everything self, so now have to do own bookings and comparisons.	Did not need to for the 1st time as the travel agent always made good choices, but am sure that there are a few people who have looked at review posted on Tripadvisor	Yes, it is company policy to provide 3 quotes and the Monarch was still the cheapest. Researcher got the impression that respondent deliberately chose 2 other more expensive alternative hotels.	Booking.com, easy to get 3 different quotes, save time and already have an user profile, which makes the booking process much quicker.	Researcher asked if the respondent would consider booking directly with the hotel as the hotel could give the client an additional discount (a portion of the commission it pays to the OTA) and the answer was yes, but would prefer the discount to be a value add such as a free dinner or transfer.
4	German	Found it on the internet when looking for boutique hotel, do not like big hotels, to impersonal and normally there are other guests that spoil the experience with too much drinking and partying	Leisure, Sandton was too expensive and Rosebank looked like a good alternative.	1st time	Looked at many websites, mantiscollection, monarch, Booking.com, tripadvisor. Always do a lot of research before booking a hotel. Unfortunately no friends have stayed at the hotel before, but have asked their opinion about Rosebank.	Yes, it was so much cheaper than the hotels in Sandton, that the price did not really matter.	Expedia, made all other reservations for holiday on this website, was also easy to covert prices into Euro.	Respondent mentioned that Tripadvisor was the most beneficial website, as it gave a good overview of what other guests experienced.
5	SA	Do not know how many times have stayed at the Monarch, but more than 10 times. 1st stayed at the hotel when it originally opened and knows the original owner who was a business partner	Business, visits Johannesburg every quarter.	Stayed many times before, the first time stayed for free as a guest of the previous owner.	Did not need to, but do research when making bookings for other hotels.	Yes, only to assert that the hotel has not become too expensive. Have queried the fluidness of the rate before, but the GM explained the Best Available rate policy.	Booking.com, no specific reason, just do it because it is so convenient and easy to use.	Similar to respondent 3, the researcher asked if the guest would consider booking direct and the response was a definite yes, on condition that the booking process is as quick and easy.
6	Nigeria	Did not know about the hotel at all, but it was the best looking hotel on Expedia when looking for accommodation in Rosebank area and it was within daily accommodation budget	Business, had a meeting with Standardbank around the corner, but also used free time to do some shopping.	1st time, but will be back as the location is so convenient	Did a lot of research, even phoned the hotel before making the booking on Expedia, wanted to know if I can invite guests over for a meal.	No, it is so much cheaper than the hotels in Lagos and wanted to get the booking at the cheap price before the rate increases as what happened to the respondent when booking flights.	expedia, found the best price on this website, it was on a special rate that none of the other websites had.	Researcher verified the special rate on Expedia with the GM, who confirmed that it was a last minute special only for the specific dates the respondent stayed, due to a 4 room cancellation they had.
7	USA	SA Business partner booked on behalf of guest, do not know why they booked through Booking.com, could possibly be because of rate of maybe convenience for the secretary	Business, 1st time to South Africa and the business partner lives in Rosebank.	1st time	Can only assume that business partner's secretary did her homework as she is very efficient. She most probably would have come to look at the hotel herself before she made the reservation.	Personally did not compare, but can only assume comparisons have been made.	Expedia, researcher had to tell this to respondent.	Respondent did mention to researcher that it was his first time to South Africa and that the booking was made only 2 days prior to arrival and he would normally make his own bookings, but because it was such a last minute decision, he left it in the hands of his busines partner. Expedia is also his OTA of choice, after reviewing hotels on Tripadvisor.

Addendum E

Section B.1

Respondent	Did the general appearance of the hotel and facilities match your expectations created by the information supplied to you by the OTA?	Did the facilities in your room and of the hotel match your expectations created by the information supplied to you by the OTA?	Did the general appearance of the staff meet your expectations ?
1	The hotel is much bigger than the impression given by friend and from pictures on Booking.com. The size of restaurant and public area's looks very small and cozy on all the websites looked at, but in real life it is much more spacious. Definitely got more than expected. Only drawback is that, although it is so close to the Gautrain, there is a bus stop in front of the hotel.	Room had everything, from under floor heating to aircon, separate lounge area with working desk at which you can actually work at, it was not put in afterwards. Bathroom had a separate shower and bath, these days you either get one of the two, or two in one. 40" TV in lounge and bedroom, very nice, but TV could have more channels - who watches Fashion TV? Guest directory, very informative and table and chairs, separate to working desk, work well when room service ordered.	Yes, the staff was all friendly and well dressed. Some staff were friendlier than others, but this does not mean that the others were below par. Jan the GM, very pleasant and seems to be at the hotel 24/7.
2	There was no photo's of the parking area of the hotel on the website and after trying to park my car, I realised why - there is almost none and the alleyway to the parking area was very narrow. All other facilities was top notch and then some. Would have preferred to see the hotel have a gym facility, but only afterwards realised that the hotel never advertised to have gym facilities, but that there is a gym nearby. Were a bit taken aback that there was a bus stop in front of the hotel, when arrived at the hotel, thought this was not good, but in fact the bus stop was very clean and not noisy at all.	The size of room worked very well, especially the separate lounge with TV. Kids visited hotel and they could watch TV whilst respondent could watch sport. Lunch menu did not have any options other than hamburger or club sandwich for kids, but waiter solved the problem by offering kids cheese and tomato sandwiches with chips and ice cream afterwards. The courtyard area was very nice at lunchtime, only used the restaurant for breakfast.	Staff looked very professional, but some were better dressed than others. The black uniforms seemed to blend in very nicely with the environment and made the staff look very formal. Personally I prefer that staff look more relaxed as it creates a more relaxed atmosphere.
3	As it was the third time staying, did not really compare to what was advertised, but was pleasantly surprised when staying there the first time. The hotel is much bigger than what the pictures show, interior although very dramatically decorated, fits in very nicely with the environment. Never felt that the hotel was crowded, although the staff said the hotel is very busy.	Size of the room and facilities within was far bigger and higher than expected, expected luxury, but got more than just luxury. Photographs used are not doing the hotel any justice. When arrived the 1st time, thought he was taken to wrong room, as the size was much bigger than size of rooms normally stayed. Received a complimentary upgrade to an even bigger room the 3rd time, as a sign of recognition for his 3rd visit. Restaurant had nice atmosphere and liked the idea that there is a private dining room for dinner parties, who normally are too loud.	Staff were all well dressed and it was easy to identify the staff from other guests. Would prefer all staff to wear name badges as some had name badges and others not. Some staff did however looked uncomfortable in their uniforms.
4	Reminded respondent of hotel visited in London, the outside does not reflect what is actually on the inside. Would have liked to have breakfast served outside in the courtyard, but breakfast buffet was set inside. Liked the fact that there is a cigar lounge and that it is serviced by waitering staff	Room much bigger than expected, could not believe the room had 2 toilets, 2 TV's a lounge area with extra table for in room dining and a working desk and a lounge. The balcony was also as big as the room. Very surprised that smoking is allowed inside the building, enjoyed a cigar after dinner. This is something small, but appreciates the fact that it can still be done by small hotels.	Staff appearance did not impress at all, staff looked like any other hotel staff member at any hotel in the world. Staff looked uncomfortable in uniforms as it is clear that the staff would not normally dress this way. Staff should be dressed more comfortable as you get the impression that, because they are uncomfortable in their uniforms, they are trying to be someone they are not.
5	Liked the fact that the hotel has not changed that much since opening. Would however have liked a more extensive dinner menu, or a menu that are changed more often, as the menu has not changed for the past 3 visits. Mentioned, since knowing the property so well, it is very difficult to capture the atmosphere on camera and put it words.	The respondent gave a very short answer, I am back aren't I, and will definitely be back when I have to come back to Johannesburg.	Staff uniform style has not changed since opening, but what stand out is that staff has become more in tune with their environment over time. The staff were very "green" initially, but with experience and training, they have become more comfortable in their environment and with guests.
6	Blown away, did not expect the hotel to be so luxorios and spacious. Not used to this kind of standard in Nigeria. Assumed that with only 12 rooms, reception area and lounges will be small, but these can cater for 24 rooms.	More than exceeded, will come and stay here even if the price is doubled, but the service has to remain the same. The cigar lounge is a very good facility to have a private meeting and lunch in the courtyard area was a nice option. Next will have all meetings at the hotel, as the facilities are so impressive, yet not intimidating, it creates a relaxing, yet formal atmosphere.	Staff are so much more professional in appearance and actions that what accustomed to in Nigeria. Got the impression that the staff is proud of their jobs as well as the hotel and this is reflected in their appearance. Shoes are shiny, no creases in their clothing, always smiles on their faces.
7	Did not have much time to use the facilities, was out most of the time and only slept in hotel and had breakfast, which was excellent. Wi-Fi signal very good, limited channels on the TV. Mini-bar only had non-alcoholic beverages which was for free, very nice surprise, but would have liked a whiskey and did not want to use room service.	Everything I needed as well as things I did not need was in my room or in the hotel. Would have liked to have a greater selection of TV channels, but also mentioned that he has an acquired taste when it comes to watching TV. Luckily the Wi-Fi was good, thus could stream his choice of program on his I pad.	Staff are so much more professional than other staff encountered in SA. Got the impression that the staff does not see their jobs as a mere contribution to their livelihood, but rather that it is a calling. All staff are always well groomed, even the staffmemeber that cleans the garden and outside area's.

Respondent	Was the service you received from the staff friendly, efficient and consistent?	Were the staff competent, knowledgeable, responsive and understanding of your needs?	Did the staff make you feel special?	What did you enjoy the most about your stay?	Additional comment/observations
1	Service with a smile, got a new meaning since staying at The Monarch. The staff on duty in the morning and evenings provided the same service levels. I came in late one night after a function, +- 01h00 and was greeted as if I arrived at a normal time and was offered a hot chocolate and asked if I needed a wake-up call. The attention to detail was amazing.	As per previous answer, staff seems to anticipate my needs and offer the service even before I realised that I needed it. If respondent could choose, he would never stay in a large hotel again, but will always look for a boutique hotel option and this is because of the staff.	I walked around the hotel and they made me feel as if I am the only person there - really a personal intimate experience	The way that everything is put together - the room, the public area's, the restaurant, the service, everything seems to compliment each other - not one element is overpowering another	Researcher got the impression that the staff really impressed this guest. The room could have been half the size and the guest would still have been very complimentary towards his overall stay.
2	The service received was exactly the service expected and then some. Was a bit cautious at check-in, but the staff took control and I was immediately put at ease. The staff are well trained, but they are not robots and when they smile, you can see that it is a real smile and not just a face that they put on. All staff seems to know what guests want at a hotel. The receptionist could order me drinks and a waiter arranged a taxi for me.	All the reviews read on Tripadvisor and Booking.com said that the service is good and definitely agree. The staff could help with directions and when they did not know, assisted with directions via Google maps. When returning from outings, always enquired if I found my destination and asked if they could help with anything else. Will definitely make mention of the staff in review on Booking.com.	Staff treated me as if I am the only one, but did so with everyone. The staff treated me the same as all the other important and wealthy businessmen staying at the hotel - this is special.	How the staff adapted and looked after kids, other hotels would have said the menu is the menu.	Researcher asked, why the review will be on Booking.com and not tripadvisor and the respondent was very opinioned about tripadvisor ad al the fake reviews that is on this website.
3	The staff are always friendly and one of the reasons why it has been the 3rd time staying at the Hotel. Consistency lacks at times as you can clearly see that the "A" team is on duty during breakfast and between 16h00 and 18h00 when guests return to the hotel after their business day. Over lunch time, service tends to be slower.	Staff are definitely more competent than during the 1st visit. As respondent was a regular in Johannesburg, did not have to ask staff anything out of the ordinary, but because it was the 3rd visit, the staff knew the respondent preferred black coffee and always made an effort to ask, if the respondent wanted a black coffee, not a cappuccino but black coffee and also did not bring milk on the tray when they delivered the coffee. during 1st time complained the room was to cold, since the 2nd visit, room nice and warm with under floor heating put on.	The staff acknowledging that I am a regular, really feels special - at bigger hotels all you get is a welcome back message and maybe a bottle of wine or a box of chocolates, nothing more nothing less.	When staying at the hotel the last time, I asked for an adapter, upon checking in, reception advised that all rooms have now been fitted with international adapters before I could ask for one. Not sure if they installed the adapters because of my request, or if they knew I asked for one the last time, but will take both.	
4	Staff once you realize that they are not in their normal environment are truly friendly, you can see that they are well trained, but when you ask for something out of the ordinary such as can you make the room up into twin beds, they did not know how to respond as we were clearly a married couple.	Once the glitch regarding the twin beds was sorted out, the staff really impressed. When enquiring about a city tour, they quickly gave me 2 or 3 options and the company we chose was really excellent.	Staff was really attentive, but not intrusive. Staff really went out of their way to make our very short stay enjoyable. The staff is a real assets of the hotel.	Stay to short, but leaving hotel with a feeling that we should have stayed 2 nights longer. The South African hospitality really impressed us and we hope that we will get the same service and hospitality for the next 10 days whilst we are in South Africa.	Researcher had to explain that this specific room, was actually designed to be converted into 2 smaller rooms, if the rate was too expensive. The couple sleep in separate beds as she sleeps with an infibulator
5	Staff are friendly and they have started using my 1st name, but put a Mr. in front of my name. I have realized that the also call the GM Mr. Jan and also some other guests who seem to be regulars. Really like this as it is familiar, but still respectful. Service do tend to be slower when the hotel is busy, but the atmosphere is great, so it does not really make a difference when breakfast takes a bit longer. Have heard other guests complain an have told "Mr. Jan" about this.	Always give 5 out of 5 for staff related questions on the guest questionnaire. The staff is not faultless, but because of their friendliness you accept their shortcomings, which are not many, but the one that stands out is that the tend to speak their home language when talking to each other and you do not know what they are saying or if they are talking about you.	Staff always makes me feels special, they do not give me any special treatment, but staying at the hotel is a treat.	Being acknowledged and being called by my first name, with the Mr. in front of course - every time I hear it or think about it, I get a smile on my face.	
6	Would give all the staff jobs in Nigeria as they would do the same amount of work as 3 Nigerians. Service was excellent, consistent and always delivered with a smile.	As per previous answer, would employ them all in Nigeria.	Special? I have never felt so important and looked after before at any other hotel. Will look for a reason to come back to SA, just to come and stay at the hotel.	Everything and the moment I think I am forgetting something I will come back. Being treated like royalty. The staff really are trying to live up to the name of the hotel, by making each guest feel that they are royalty.	
7	Heard mixed reviews from business contacts who have been to SA, regarding the consistency and efficiency of staff in SA. Are ageing with those who says that service is good and friendly. Consistence now again let the staff down, but could have been because of accent and different terminology.	Staff have been excellent, they really have perfected that art of personal service, business partners PA have been thanked about 10 times for introducing a boutique hotel experience. Staff really made stay special, although not spending much time at the hotel, which is also an indication what impression staff made.	The way they welcome you when you arrive, the way they say goodbye when you leave for meetings - you get the feeling that they are really sincere - that is quite special.	Normally there is a problem when I stay at a hotel, this time there was none. I am not a difficult guest, but like things to run smoothly and this stay was impeccable. The professional, yet personal service. It is fine line the staff is treading on and they seem to have mastered it.	

Section C

Respondent	Will you return to the hotel and why?	Will you recommend the hotel to family, friends or colleagues - why?	Will you post a review on a travel review website such as Trip	What will you remember about your stay?
1	Most definite Yes. The hotel has some kind of magnetism which pulls me towards it and have already made a tentative reservation for next visit to Johannesburg	Done so already, there is over 20 photos' on my Facebook account. Why - Good service needs to be complimented.	The same photos will go onto tripadvisor	Everything, but if I had to single out something or some, it would be Zach who manages the reception area. He just makes you feel so welcome and at ease and whenever you ask for something, it gets done.
2	Yes, found my new home from home in Johannesburg. Come to Johannesburg every 2nd months to visit kids and the hotel is not only conveniently located, but changed my perception of hotels for life.	Will recommend it to friends. Why, I think I have discovered a hidden gem.	Yes, as this hotel deserves to be acknowledged	Having lunch with kids in the courtyard area, felt that it could have been a Saturday at home.
3	Yes, have returned twice and are planning to return many more times if price remains competitive. There are lots of reasons why I would return to the hotel, but the most important one is because I feel so comfortable here.	Whenever I get the opportunity I tell everyone I know who are travelling to Johannesburg to come and stay at the Monarch. Why - I know I will not be let down by the team.	Yes, posted a review the 1st time I stayed at the hotel	The attention to detail of the staff, how they see all the things they see and doing it right the 1st time, really is impressive
4	Yes, but doubt if we ever will as there are so many other countries we would still like to explore. Why - Boutique hotel stays for us have been set a new standard	Photo's of Monarch all over our Facebook pages and we are doing a travel blog and all our friends are reading this.	No, we are to private to tell everyone where we have been and what we thought about the hotel.	Service, service, service - Staff really made the 2 nights in Johannesburg a very good start to the holiday.
5	Already booked my next stay as I checked out. Why - I just love it here and they love me.	Think everyone I know, by now knows of the Monarch. It is a very good story to tell.	No, I do not do social media.	Being elevated to first name basis. I am still smiling whenever I say or hear it.
6	Yes, can't wait. Why - After a busy day, arriving at the hotel with all the friendly faces and luxury around you - who would not want to come back.	Already told all my business associates in Nigeria. Why - they need to come and see what service and luxury is.	No, to cumbersome to register on tripadvisor and if I had to write my review, other people would think I am lying.	The way I was treated, I feel like a king.
7	Yes, the next time I will make my booking. Why - I like to choose a hotel and if I like it, become a regular, meetings in SA went well and looks like I will be returning on a regular basis. Have already spoken to Mr. Jan, about a regular guest rate. The Mr. Jan thing was brought to my attention by a guest who left yesterday and I hope that I will also be called Mr. soon. As this formal familiarity is what describes the hotel the best.	Told my SA partner that this is our hotel of choice and whenever we need to recommend a hotel to business or social partner, it has to be Monarch. Why - can not think of a reason why not.	No, do not have the time to post reviews.	How the staff seem to know when to ask if I require something and when to leave me alone. The understated luxury of the building, rooms facilities and staff - you feel special, but it is not 1 thing, but everything together.