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Are hotels serving quality? An exploratory study of service quality in the Scottish hotel sector

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Abstract

The importance of tourism to Scotland, the criticality of the hotel sector to its growth and the link between service quality and business profitability provide the rationale for this study. Although service quality in the hotel industry has been well researched, there is little comparative research across the Scottish hotel sector on service quality aspects. This study examines service quality across small, medium and large hotels in Scotland to establish management and customers' current perceptions of service quality performance. Empirical findings indicate service is being lost by the focus of the Scottish QA scheme on tangibles and there are major inconsistencies in service quality performance across the sector. The implications of the findings and avenues for future research are delineated in the study.

Keywords: Service quality; Service delivery; Hotel service; Customer expectations; Standards

1. Introduction

The hotel sector in Scotland is part of the larger tourism industry that generates in excess of £4.5 billion for the Scottish economy. The Scottish Executive aims to grow this to c. £6.0 billion within 10 years. Since its creation the Scottish Executive has introduced several initiatives aimed at growing tourism. The latest is to promote Scotland as the 'best small country in the world' (BBC News, 2005). In 2003, over 18 million tourists took overnight trips to Scotland and annual expenditure was about £4.4 billion (VisitScotland, 2004).

1.1. Structural change

Until recently the Scottish hospitality sector was managed by a plethora of agencies. Tourism promotion was delivered at national level by the Scottish Tourist Board and at local level by 14 Area Tourist Boards. In 2005 the Area Tourist Boards merged with VisitScotland to operate as an integrated tourism network. Since then VisitScotland has promoted Scotland to markets across the world, although the development of tourism remains the remit of another public agency, Scottish Enterprise. In the other UK countries these activities are managed by one agency enabling a much closer relationship to develop between the critical areas of marketing, quality and development in a destination.

It is argued that the structural changes came about because government ministers sought to grow tourism to compensate for the decline in manufacturing (Kerr, 2003). The systematic weakness of the sector in terms of fragmentation and the complicated relationships of those involved, results in Scotland failing to realise its commercial potential. Also there is a lack of clarity regarding sector roles and responsibilities and the endless initiatives designed to improve the quality of Scottish tourism cannot work without addressing a range of additional complex issues (Kerr, 2003).

Concurrently the sector has experienced significant growth in budget hotels, restructuring of the medium sized sector from independents to chains, and further standardisation of

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product offering and loyalty programmes by the large branded chains. The boom in budget hotels and a general lack of investment in the medium sized sector has resulted in many medium hotels being sold for their property value. Although Scotland is now well served with budget hotels there remains a lack of quality mid-range hotels resulting in the growth of the more expensive lifestyle urban hotel (Mawer, 2006). The impact of these changes is still to be established.

1.2. Characteristics of the Scottish hotel sector

Characteristics distinguishing the Scottish hotel sector are highlighted in a review undertaken by the Scottish Office (1997). This indicates there are over 2500 registered hotels providing highly diverse accommodation from the prestigious city centre hotel to the small owner/operator. The report highlights most are small, typically family-owned and run. The average Scottish hotel has 16 bedrooms and 31 bed spaces, and international companies investing in Scotland (e.g. Sheraton and Marriott) build their smallest hotels here, of around 250 rooms. These are among the largest in Scotland. Most have fewer than 10 staff and the majority in the Highlands and Islands are very small with over 75% employing less than 5 people. When coupled with seasonality, a significant proportion must be considered as either subsistence or lifestyle occupations. Low profitability means that long-term investment is difficult with high staff turnover, low skill levels and low wages also hindering effective development. Low pay is the most cited reason for leaving the industry (Egberts, 2002). As barriers to entry are low and demand is highly segmented, the hotel sector attracts enthusiastic amateurs which can have implications for the consistency of service delivery. These characteristics make it difficult to apply the generic findings from other research undertaken in the field of quality and service.

One of the main aims of VisitScotland is to improve standards in an environment faced with an increase in business costs and a fall in revenue. Indeed the boom period of the late 1990s for the hospitality sector was challenged by foot and mouth disease, 9/11 and the Iraq War. On average tourism businesses lost 2.2 members of staff due to the decline in business levels and in particular a sharp drop in North American tourists visiting Scotland (VisitScotland, 2003). Although the sector has recovered, the impact of the terrorist bombs in London and the forthcoming Olympics remains to be seen. Recruitment patterns have been unpredictable with hiring freezes as a result of external factors, to the need to keep key personnel in the light of optimism about prospects for 2005 onwards (Johnston, 2004). Inward migration from the new EU 'accession' states (e.g. Poland) has modified recruitment patterns further.

Nonetheless, the main hotel chains have continued their expansion for example taking advantage of Glasgow's regeneration programme. In 2003/4, international chains, including Radisson and Ascott International opened in Glasgow. Additionally Scottish hotels are experiencing the growing trend in the short-break market, influenced by the increase in budget airlines and cheaper hotel deals. Whilst the cheaper deals have met the needs of a more demanding consumer market, they have helped stall revenue growth in the sector (VisitScotland, 2003).

Scotland was a pioneer in the UK in the use of star rating schemes to facilitate customer differentiation of hotels and their offerings. The classification of UK hotels has been problematic because of the diverse quality assurance schemes in operation including tourist board schemes, those operated by the Automobile Association (AA), RAC and Michelin. In 1999, the English Tourism Council and others agreed a standardised scheme. Notwithstanding, the Scottish and Welsh Tourist Boards devised their own scheme, thus visitors to the UK are confronted with several schemes. The Scottish scheme is based on a five star grading and classification system currently undergoing evaluation with a view to offering more clarity for the customer. VisitScotland administers this through a team of quality inspectors. The absolute need for such schemes is emphasised by Israeli (2002) who found that Israeli hotels ignored the decision taken by the Ministry of Tourism to terminate the star rating system. Rather they continued to advertise their star rating previously awarded. Despite the lack of official backing for the rating scheme, it was found empirically to be a better predictor of quality and the ability to achieve a premium price than the use of brand names.

1.3. Global developments affecting the hotel sector

As elsewhere customers of the Scottish hotel sector have become more sophisticated and demanding (Sharp, 2001). In such an environment the quality of service has become vital (Qu, Ryan, & Chu, 2000). The importance of quality as a business objective is recognised by chains such as the Four Seasons and Rocco Forte hotel groups which are addressing service quality as a key success factor that can bring significant strategic advantage (Erstad, 2001). Nonetheless, Perry (2003) suggests that facilities and services look increasingly alike and delivery often falls short of the published star ratings.

A global phenomenon, increasingly influencing hotel selection, is the development of feedback websites (Tripadvisor.com, igougo.com and hotelchatter.com) where customers post reviews of their experiences. These websites give customers the opportunity to share their experiences of the 23,000 featured destinations and comment on their experience of service delivery. Smith (2006) reasons that the rapid switch to broadband has precipitated this phenomenon to a tipping point, whereby information which was predominantly a one-way 'read only' medium has now become a two-way participatory, collaborative and interconnected medium. As a result, businesses will have to establish new relationships with their audiences.

1.4. Rationale for the study

Given these challenges and changes the researchers were concerned to assess the impact of these on the sector and in particular to examine service quality delivery from both a management and customer perspective. Although service quality in the hotel industry has been examined in a number of studies (Chang, Lee, & Shin, 2002; Tsang & Qu, 2000) there is little comparative research across the Scottish hotel sector on service quality. This despite the fact that the effectiveness of a service business is linked to service quality and, in the hotel sector, service quality not only has a positive and direct effect on competitiveness, but also an indirect positive effect via other variables such as occupancy level and average direct costs (Harrington & Akehurst, 2000). Service quality is critical to the profitability of the sector and to the growth of tourism in Scotland hence this study examines service quality delivery across all sizes of hotels to assess service quality performance.

The research has a number of objectives. Firstly, it seeks to determine if there is a relationship between hotel size and the relative importance of service quality determinants. This premise is based on structural variation in the sector, whereby small to medium hotels are often run by enthusiastic amateurs, contrasted with the standardisation of the product offering by large branded chains. Ingram (1996) proposes that independent hotels (not identifiable as part of a chain) may view the relationship with customers as 'transactional'. As the customer is unlikely to revisit the same destination on a second occasion, there is little incentive to commit to providing quality service. Whereas hotels which are part of a chain will have a vested interest in providing quality as there may be the opportunity for repeat business albeit at a different destination. Secondly, the study investigates the key determinants of service quality from a management perspective and compares these with customers' experience of delivery of these determinants using TripAdvisor. Thirdly, it evaluates whether the growth of demanding and informed customers, constantly seeking a 'better deal' is creating an environment of improvement leading to excellence in all segments of the sector. Fourthly, it seeks to determine whether service quality is producer-driven (in this case VisitScotland) or customer-driven (hotels and their customers).

2. Literature review

Service quality in the hotel industry has been examined in a number of studies (Chang et al., 2002; Sargeant & Mohamad, 1999; Tsang & Qu, 2000) and there are a number of models that conceptualise the construct of service quality (e.g. Gronroos, 2001; Bienstock, Mentzer, & Bird, 1997; Parasuraman, Zeithaml, & Berry, 1988; Garvin, 1987). More recently researchers are concerned with the management of services (Rowley & Richardson, 2000) whilst others focus on why best practice does not work (Lockyer & Scholarios, 2004). Some consider measurement and the use of SERVQUAL in hotels in Northern Ireland (Gabbie & O'Neill, 1997), whilst Chang et al. (2002) consider its use in Korean hotels. Chu (2002) uses SERVQUAL and the regression models and finds similarity between both approaches.

Recent UK research focuses on service management issues (Nolan, 2002) and on the use of technology (Buick, 2003). However, comparative research across the Scottish hotel sector is less common, other than in more generic reports. Thus this paper focuses on service quality, its determinants and delivery across the sector.

2.1. Service quality and its determinants

There is a lack of consensus about the construct of service quality (Johnston, 1995). The most common approach is that of the disconfirmation paradigm (Robledo, 2001) which asserts that quality can be defined as the gap between customers' expectations and perceptions (Parasuraman, Zeithaml, & Berry, 1990). These researchers proposed a conceptual framework capturing the dimensions utilised by customers when evaluating service quality. The dimensions were then applied to a gap model (SERVQUAL), where customers compared prior expectations of service provision with post experience perceptions (Parasuraman, Zeithaml, & Berry, 1985; Parasurman et al., 1988). Criticism of the gap model (Cronin & Taylor, 1994) led to the emergence of the derived importance approach which links customer satisfaction to service quality (Bolton & Drew, 1994). Rather than collect ratings of perceived importance associated with service dimensions, regression models identify significant drivers of satisfaction. This precipitated the development of SERVPERF (Cronin & Taylor, 1994) and Normed Quality models (Teas, 1993). In a study of Hong Kong hotels, Chu (2002) suggests that the derived importance model is the more statistically reliable approach. Nevertheless, there is still wide support for both approaches.

There is agreement that the problems involved in addressing service quality management are in part a reflection of the intangible, simultaneous, nonstandardised and perishable nature of services (Harris & Harrington, 2000). The characteristics of services and their relationship to service quality are also difficult to clarify (Soteriou & Chase, 1998). The hotel sector faces manufacturing problems in providing high quality products and service delivery problems in providing high quality services (Keating & Harrington, 2002).

The delivery of hotel services involves high contact encounters with significant interaction among customers, staff and facilities (Lovelock & Wright, 1999). Variability is inherent (and in some cases desirable) in service delivery. The challenge for management is to balance the need for routine and standardisation with the need to treat customers as individuals. Excellent companies know that positive employee attitudes promotes stronger customer loyalty, thus companies must attract the best employees with a long-term career focus (Kotler & Keller, 2006).

Additionally, in a high contact setting, the physical evidence (tangibles) gives strong clues as to the quality of the service provider by communicating a message to the customer about the establishment before and during the encounter, and strongly influences the evaluation of the overall experience (Lovelock & Wright, 1999).

There is consensus that the quality of the service encounter is critical to business success or failure and that service quality is rarely concerned with a single aspect of service but with the whole service package (Berry, Carbone, & Haechel, 2002). Indeed service quality in a tourism context has been viewed mostly as the quality of the opportunities available at a destination and is considered to be related to a tourist's quality of experience (Crompton & Love, 1995).

Underpinning our understanding of service quality is an array of determinants or dimensions which are critical for service management as these are essential to specify, measure, control and improve customer perceived service (Johnston, 1995). There is debate over the number and actual determinants of service quality. Garvin (1987) identifies eight determinants; performance, features, reliability, conformance, durability, serviceability, aesthetics and perceived quality. Parasuraman et al. (1985) identified ten which were subsequently collapsed into five (Parasuraman et al., 1988); tangibles, reliability, responsiveness, assurance and empathy. Walker (1990) identifies product reliability, a quality environment and delivery systems that work together with good personal service, whilst Johnston, Sivestro, Fitzgerald, and Voss (1990) signal that there are as many as eighteen determinants. Subsequently, Johnston (1995) argues that researchers have not distinguished between the effect of determinants in the creation of satisfaction or dissatisfaction.

2.2. Customer satisfaction and service quality delivery

The relationship between service quality and satisfaction has attracted much research in recent years (Johnston, 1995, 2004; Qu et al., 2000). There is broad consensus that service quality and customer (visitor) satisfaction are different constructs but little agreement on the nature of their relationship although both influence visitors' future destination selection intentions (Tian-Cole & Crompton, 2003). This is important to Scotland as it tries to grow tourism and become a leading international destination by 2015. Service quality is an overall evaluation of the destination and satisfaction is concerned with the overall evaluation of the experience at the destination (Tian-Cole & Crompton, 2003).

Early work on satisfaction and dissatisfaction treated (dis)satisfaction as a two state construct (e.g. angry or not angry) whilst recently satisfaction is conceptualised as a continuum often expressed in terms of emotions (Johnston, 2004). However the emotional basis for the satisfaction response is not well documented (Oliver, 1997). Notwithstanding, recent research suggests that emotions play a major role in perceived levels of service quality and satisfaction (Dube & Menon, 1998). These researchers linked feelings of anger and frustration to decreases in dissatisfaction and emotions such as happiness to increases in satisfaction. Excellent service results in positive feelings of 'delight' at one end of this emotional spectrum. In the past many businesses have been satisfied with meeting perceptions of customers' 'adequate' expectations, whereas nowadays the emphasis is on customer satisfaction (Fisk, 2002). In the future more businesses will be concerned with achieving customer 'delight' because satisfying customers is not enough to retain them (Schneider & Bowen, 1999).

Whilst many businesses continue to promise exceptional service, and focus on doing things better, faster and cheaper, few appear to be actually delivering excellence (Terrill & Middlebrooks, 2000). Too many companies strive for 'OK' but by definition 'OK' reflects the minimum acceptable level (Self, 1997). Many quality problems arise because the service proposition is producer-driven not customer-driven (Chekitan & Schultz, 2005). Globally the hotel sector is experiencing a decline in service quality but this decline appears severe because the sector had created a 'wow' effect in the 1990s (Pizam, 2004). In other words the sector had 'ratcheted up' customers' expectations to a level which they could not sustain or exceed contemporaneously. Pizam signals that hotels have deliberately lowered quality objectives and reduced performance standards to recover costs following the depression of 2001–2002. Caterer-Search.com (2002), reporting on the Which Hotel Guide for 2003, suggests that dirty rooms, petty rules and hostility towards children are just some of the problems UK hotels need to address to win back visitors.

This review suggests that, service quality is an elusive concept; customers know when they receive it and when they do not. Additionally emotions, negative and positive, are increasingly important in forming service quality perceptions. However, definitions, determinants and robust delivery of service quality remain elusive. The combination of characteristics and complexity identified in the proceeding discussion leads to four propositions that become the focus of the study.

2.3. Resultant propositions

P1. Service quality determinants vary according to size of hotel.

P2. There is a gap between the key determinants of service quality identified by management and customers' experience of delivery of these determinants.

P3. Demanding and informed customers are creating an environment of improvement leading to excellence in all segments of the hotel sector.

P4. The star grading scheme and associated standards are largely producer-driven.

3. Methods

The overall study objective was to examine service quality delivery across all sizes of hotels to assess service quality performance. The project involved the following activities: reviews of relevant research; a survey of hotel management respondents across the sector; supplementary interviews with experts; an assessment of customers' experience of service quality through an analysis of comments and findings on Trip Advisor; SPSS analysis of means for the respondent scores and an analysis of variance (ANOVA). This study was undertaken between October 2004 and May 2005.

Firstly, a purposeful survey of hotel management (i.e. at facility level) across the Scottish hotel sector was conducted. The survey utilised the Hotels in Scotland Directory which provides a frequently updated geographical listing of Scottish hotels. The sample was proportionally stratified by size (small, medium and large) and by type (chain and independent) thus skewed towards the small hotel given its dominance. Definitions of size were taken from VisitScotland as the national tourism agency and based on room numbers (small 1–20, medium 21–80, large >81). Four hundred questionnaires were issued to hotel respondents across small, medium and large hotels. Given the diversity of prior research, lists of pre-set determinants of service quality were avoided and all questions were open-ended. The questionnaire covered definitions, determinants of service quality, customer satisfaction issues, standards, training and the challenges facing the sector.

Complementing the survey, individual in-depth interviews were undertaken with one Hotelier with 40 years experience of the sector, a VisitScotland Quality Assurance (QA) Advisor and a Training Consultant who works across the Scottish hotel sector. Interviewees were probed in their specialist areas facilitated by a topic guide based on the questionnaire.

To explore the customers' perspective TripAdvisor was utilised. Tripadvisor.com is the largest global travel information and advice source on the web providing c. 4 million customer reviews of c. 200,000 hotels. Around 19 million individuals visit the site monthly. Customer feedback was available for 71 of the 132 respondent hotels (27 large, 18 medium and 26 small hotels). To ensure contemporary information, only reviews from January 2004 onwards were included. One hundred and fifty-four reviews were available for large, 61 for medium and 63 for small hotels. The average number of reviews examined was 5.7 for large, 3.4 for medium and 2.4 for small hotels, reflecting the expected throughput of guests. TripAdvisor invites customers to give both a quantitative and qualitative assessment of their experience. Comments were analysed by two of the authors independently using open and selective coding. Key words and phrases were summarised and transposed into the quality determinants identified by hotel respondents namely: Standards, Friendliness and Warmth, Personal Service, Value for Money and Tangibles.

In this context and to ensure the constructs of a sound qualitative study were achieved (Lincoln & Guba, 1985), feedback items were checked against a description of each determinant and clustered around the most appropriate one so that, for example, a number of items were clustered to form the Personal Service determinant:

- always willing to help;
- effectiveness of employees when problems arise;
- understands specific needs;
- courteous employees who are consistently pleasing;
- caring and individual attention freely offered;
- service delivered when promised.

While these items represent a myriad of reliability, responsiveness, and empathy attributes they had one common feature. All were distinctive of the personal hotelier and were apparent to customers throughout their stay in a hotel.

Comments on determinants (positive and negative) were scored against a five-point scale (1 = very poor and 5 = excellent). SPSS analysis of mean scores and ANOVA was undertaken to identify differences between the means of groups and the Kruskal–Wallis non-parametric test was used to validate the findings.

Additionally to help determine whether demanding and informed customers are creating an environment of improvement leading to excellence across the sector, TripAdvisor's own rating scheme was also utilised. Customers score five determinants; Room, Service, Value, Cleanliness and Dining on a five-point scale and can comment on any aspect of their experience.

4. Findings

The postal questionnaire elicited 132 usable questionnaires. This represents a response rate of 33% (132 of 400). The distribution by chain and independent hotel and by size is illustrated in Table 1.

Table 1
Respondent hotels by type and size

	Size			
	Large	Medium	Small	Total
Chain	22	13	2	
Independent	8	13	74	
Total	30	26	76	132

4.1. Service quality determinants vary according to size of hotel (P1)

To examine P1 hotel respondents were asked to define service quality and then to identify the key determinants of service quality from their hotel's perspective.

All hotel respondents defined service quality as either meeting (40%) or exceeding customers' expectations (60%). The split for those who indicated 'meeting' customers expectations was 40% for large (75% of which were chains), 30% for medium and 30% for small hotels. However, there were a diverse range of definitions including 'it's about the little things'; 'it's about attention to detail'; 'it's about competence of staff'; 'it's about speed of throughput'; 'it's about attitude and culture from the top down'; and 'it's about customer delight' signalling little consensus on definitions of service quality. The respondents who defined service quality in terms of exceeding customers' expectations emphasised that 'it was all about getting the little things right.'

Respondents identified nine broad determinants of service quality (Table 2). Medium hotels identified eight and large hotels six determinants. This produced five determinants common across all sizes of hotels. These were also the most frequently cited: Standards, Friendliness and Warmth, Personal Service, Value for Money and Tangibles. Given the variation between the different sized hotels χ^2 tests were undertaken to identify significance (Table 3). These tests indicate that due to sample size most of the significance was marginal (Table 2). There were no significant differences between independents and chains across these determinants.

All sizes of hotels saw Standards as the key determinant of service quality. Value for Money, Uniqueness and Tangibles were emphasised by medium hotels whilst Friendliness/Warmth and Personal Service were stressed by small hotels. Only 10% of large hotels identified Friendliness and Warmth (emphasising their business imperative for volume throughput perhaps) and Tangibles as key determinants, despite these being key assessment areas for VisitScotland's inspectors. VisitScotland's star rating scheme grades the key determinants of housekeeping/cleanliness (with a strong emphasis on condition of tangibles) friendliness and efficiency. VisitScotland does not grade value for money. The QA Advisor suggested that Value for Money presented a major challenge as this determinant varies for each customer. Nonetheless, all of the chains and 65% of the independents signalled that, with the advent of the budget hotels offering cheaper deals, Value for Money is now essential to meet the needs of a more demanding market.

These findings support P1 that service quality determinants vary according to hotel size.

Table 2
Quality dimensions vs. size of hotel

	Large	Medium	Small	Overall	Significant
Personal service	23.3	34.6	39.5	34.8	No
Value for money	13.3	50.0	21.1	25.0	Yes
Friendliness/warmth	10.0	46.2	42.1	35.6	Yes
Attention to detail	3.3	0.0	14.5	12.0	Yes
High standards	40.0	69.2	60.5	57.6	No
Uniqueness	0.0	38.5	9.2	12.9	Yes
Natural approach	0.0	15.4	9.2	8.3	No
Tangibles	10.0	38.5	17.1	19.7	Yes
Efficiency/professionalism	0.0	11.5	17.1	13.6	No

Note: Percentage of hotels that included the particular dimension as a key dimension of service quality.

4.2. There is a gap between the key determinants of service quality identified by hotel management and customers' experience of delivery of these determinants (P2)

Definitions and key determinants of service quality identified by hotel respondents were discussed in Section 4.1. Hotel respondents were also asked to identify how these determinants were used to help meet or exceed customer expectations. All respondents identified the following:

- continual on the job training to identify customer requirements—so that employees can differentiate between the business customer and the tourist who require different kinds of service;
- offer special rates and upgrade where appropriate;
- supervision, training and monitoring to maintain standards;
- proactive service through selling to provide better service and better profits. Ask if the customer needs another drink. Ask, 'Is there anything I can get you?';
- clean rooms with modern furniture and cable TV;
- provision of accurate information online which sells the hotel;
- recruitment and selection of skilled, competent and caring staff.

To examine customers experiences of delivery of these determinants, customer comments on TripAdvisor for the 71 sample hotels (27 large, 18 medium and 26 small) were coded and transposed to the quality determinants identified by hotel respondents.

The findings indicate differences between small, medium and large hotels as illustrated in Table 3.

The significant difference between small, medium and large hotels is well illustrated in the bar chart for the Personal Service determinant (Fig. 1).

Overall the findings suggest that 70–80% of customers are satisfied to highly satisfied with the performance of small hotels across all determinants, 70% of customers are satisfied to highly satisfied with medium hotels across most of the determinants and only 35–58% of customers are satisfied to highly satisfied with the performance of large hotels across all determinants. Indeed, customer feedback suggests comparatively high levels of

Table 3
Cross tabulations of dimension responses for each dimension by hotel size (including χ^2 results)

χ^2		Very poor	Poor	Average	Good	Excellent
Friendliness, $P<0.0005$						
Hotel size						
Small	Count	2	3	2	3	35
	% within hotel size	4.4	6.7	4.4	6.7	77.8
Medium	Count	4	2	1	9	26
	% within hotel size	9.5	4.8	2.4	21.4	61.9
Large	Count	16	11	10	27	24
	% within hotel size	18.2	12.5	11.4	30.7	27.3
Total	Count	22	16	13	39	85
	% within hotel size	12.6	9.1	7.4	22.3	48.6
Standards, $P<0.0005$						
Hotel size						
Small	Count	3	4	5	8	35
	% within hotel size	5.5	7.3	9.1	14.5	63.6
Medium	Count	5	3	4	10	21
	% within hotel size	11.6	7.0	9.3	23.3	48.8
Large	Count	19	14	16	30	13
	% within hotel size	20.7	15.2	17.4	32.6	14.1
Total	Count	27	21	25	48	69
	% within hotel size	14.2	11.1	13.2	25.3	36.3
Personal service, $P<0.0005$						
Hotel size						
Small	Count	2	5	4	5	35
	% within hotel size	3.9	9.8	7.8	9.8	68.6
Medium	Count	3	5	1	11	20
	% within hotel size	7.5	12.5	2.5	27.5	50.0
Large	Count	20	18	5	23	11
	% within hotel size	26.0	23.4	6.5	29.9	14.3
Total	Count	25	28	10	39	66
	% within hotel size	14.9	16.7	6.0	23.2	39.3
Value for money, $P=0.049$						
Hotel size						
Small	Count	6	2	3	10	15
	% within hotel size	16.7	5.6	8.3	27.8	41.7
Medium	Count	1	5	2	13	12
	% within hotel size	3.0	15.2	6.1	39.4	36.4
Large	Count	4	11	10	15	10
	% within hotel size	8.0	22.0	20.0	30.0	20.0
Total	Count	11	18	15	38	37
	% within hotel size	9.2	15.1	12.6	31.9	31.1
Tangibles, $P<0.0005$						
Hotel size						
Small	Count	5	5	3	12	22
	% within hotel size	10.6	10.6	6.4	25.5	46.8
Medium	Count	7	8	6	9	19
	% within hotel size	14.3	16.3	12.2	18.4	38.8
Large	Count	19	40	22	34	18
	% within hotel size	14.3	30.1	16.5	2.6	13.5
Total	Count	31	53	31	55	59
	% within hotel size	13.5	23.1	13.5	24.0	25.8

dissatisfaction (from 31% to 49%) across all determinants for large hotels. Notably, although only 10% of large hotels identified Friendliness and Warmth as a key determinant of service quality this was the highest rated determinant for large hotels. The results also suggest that Personal Service and Value for Money act as both satisfiers and dissatisfiers. Interestingly, location, although not a determinant elicited strong feelings of satisfaction leading to complimentary behaviour but at the same time (especially where information provided about location

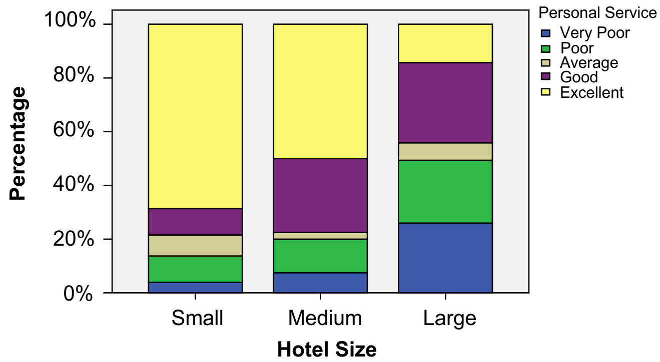

Fig. 1. Percentage bar chart for personal service.

prior to arrival was less than accurate) caused strong feelings of dissatisfaction. This demonstrates the link between service quality and customer satisfaction where location is part of the overall evaluation of the destination (Tian-Cole & Crompton, 2003).

Common criticisms of hotels by customers on TripAdvisor included 'dirty rooms', 'slow service' (especially at check-in/out), 'unhelpful and rude staff', 'overpriced for actual experience'. The 'attitude of not being interested in me or my problem' was frequently noted. In many cases customers complained about information provided regarding location and price found on arrival to be inaccurate or even disingenuous. A frequent comment was that the information about star rating was misleading. Fifty-one per cent of the postings suggest that hotels which were 'high star rated lacked high star service'. Conversely, there were also highly positive comments from customers including, 'amazing value', 'superb service' and 'excellent'. Interestingly of the 278 postings, 120 contained a mixture of the positive and the negative (receiving an overall TripAdvisor score of 3 or 4), 83 comments were overwhelmingly negative and 75 were positive.

One-way ANOVA was used to test the null hypothesis that means across the three size groups were all equal. The results indicate that the variance between groups was greater than the variance within groups and significant differences in mean scores for different size hotels, where $P<0.0005$, in all dimensions except Value for Money where the difference was marginal (Table 4). Further analysis using Tukey's test revealed that mean scores were significantly higher for small hotels compared to large hotels in all dimensions ($P<0.005$) except 'Value for Money'. Similar results were obtained for medium hotel means, showing higher mean scores than large hotels ($P<0.005$ for Standards, Friendliness and Personal Service. $P=0.034$ for Tangibles). No significant differences were found between small and medium hotels, although means were always higher for small hotels.

There were no significant differences between chains and independents negating somewhat Ingram's (1996) proposition that independents will take a transactional approach

Table 4
One-way analysis of variance for hotel types

	Sum of squares	df	Mean square	F	Significant
Standards					
Between groups	54.771	2	27.386	15.361	0.000
Within groups	333.381	187	1.783		
Total	388.153	189			
Friendliness					
Between groups	43.502	2	21.751	11.967	0.000
Within groups	312.635	172	1.818		
Total	356.137	174			
Personal service					
Between groups	76.124	2	38.062	20.700	0.000
Within groups	303.393	165	1.839		
Total	379.518	167			
Value for money					
Between groups	7.607	2	3.804	2.242	0.111
Within groups	196.829	116	1.697		
Total	204.437	118			
Tangibles					
Between groups	34.312	2	17.156	9.254	0.000
Within groups	418.998	226	1.854		
Total	453.310	228			

whereas chains will take a more "transformational" approach.

The ANOVA was undertaken using ordinal data thus a non-parametric test (Kruskal–Wallis) was used to validate the findings. The same results were found (Table 5).

One of the most significant findings was that despite the many negative comments, only one small hotel had responded to customer feedback. Surprisingly none of the three interviewees in the survey were aware of the existence of this website.

Thus, these findings support P2 suggesting that there is a small experience gap between the key determinants of service quality identified by hotel respondents and customers' experience of delivery of these determinants, in small and medium hotels and a significantly larger experience gap in large hotels.

4.3. *Demanding and informed customers are creating an environment of improvement leading to excellence in all segments of the hotel sector (P3)*

P3 was examined using customer comments for the 71 hotels and TripAdvisor's own rating scheme which asks customers to rate their experience on a five-point scale (1 = very poor and 5 = excellent) for Room, Service, Value, Cleanliness and Dining.

Only six small, seven medium and one large hotel scored excellent (5) across all Trip Advisor determinants. These 14 hotels (c. 20% of the sample) had a spread of one to three reviews and comments included, 'wonderful oasis', 'amazing value', 'everything was great', 'awesome and wonderful'. Six of these hotels were low priced budget chain hotels.

Table 5
Kruskal–Wallis test of mean ranks

Hotel size	*N*	Mean rank
Standards		
Small	55	122.53
Medium	43	108.81
Large	92	73.12
Total	190	
Friendliness		
Small	45	112.72
Medium	42	101.17
Large	88	69.07
Total	175	
Personal service		
Small	51	110.10
Medium	40	97.95
Large	77	60.56
Total	168	
Value for money		
Small	36	64.94
Medium	33	67.27
Large	50	51.64
Total	119	
Tangibles		
Small	47	144.38
Medium	49	127.82
Large	133	99.89
Total	229	

	Standards	Friendliness	Personal service	Value for money	Tangibles
Test statistics[a,b]					
χ^2	33.397	29.652	39.006	5.523	18.906
df	2	2	2	2	2
Asymp. sig.	0	0	0	0.063	0

[a]Kruskal–Wallis test.
[b]Grouping variable: hotel size.

In all Value for Money and Location acted as satisfiers. Conversely, many comments were highly critical of 'false advertisements online especially about cheap deals', 'unprofessional and incompetent staff', 'dirty rooms', 'extremely poor service', 'poor value for money' and 'not interested in me or my problems.' Many concluded by recommending: 'Don't stay here!'.

One comment:

> If they had been the least bit courteous, attentive, and/or professional then I would not bother advertising the numerous shortcomings .... because they were so incomprehensibly rude … I will air this companies dirty laundry to any and all considering staying here.

The effect of dissatisfaction is clear. Conversely, where the experience was good customers recommended the hotel to potential visitors. Interestingly, analysis of the comments suggests that most customers were not looking for excellence—clean rooms, pleasant staff, accurate information and value for money are not unreasonable expectations. Many customers emphasised that it was 'the little things that count' reflecting hotel respondents in Section 4.1 who identified 'the little things' as an aspect of exceeding customers' expectations. Customers appear to be highly satisfied when they experience a helpful, friendly and caring service which also provides accurate information and represents value for money. Conversely poor service and resultant dissatisfaction is linked to indifferent service, inaccurate information, inconsistent service delivery and incompetent staff. The main difference between excellent and poor service seems to be about how hotels deal with (or don't deal with) problems and the presence or absence of the personal touch.

There is a gap between many of these comments which represent customers' experiences of particular hotels and the actions identified as being taken by respondent hotels to meet or exceed customers' expectations (Section 4.2). However, not all hotels aspire to 'exceed' customer expectations as 40% equate service quality with simply meeting expectations (Section 4.1). Many of the respondents from the large hotels intimated that achieving service quality and hence customer satisfaction is becoming increasingly difficult, not least because of changes in the customer base.

Respondents from large hotels also intimated that staff are critical to the delivery of service quality and that it is becoming increasingly difficult to attract and retain staff in an environment of uncertainty characterised by long hours and low pay. Several respondents identified that housekeeping and kitchen staff are particularly difficult to recruit and retain. This creates problems for the sector because rooms and restaurants are the key products. Respondents from small and medium hotels also identified staff retention, lack of training, grading scheme requirements and overly demanding customers as their main challenges.

Chain hotel respondents argued that training and development strategies were essential to counteract staffing problems. In terms of training there were some interesting results. A majority of small and many large hotels were undertaking very little training. This may be a reflection of the retrenchment in 2001/2002 as hotels lowered quality objectives and reduced performance standards to recover costs (Pizam, 2004). Yet, 76% of medium hotels were undertaking above average to well above average levels of training. Some of the small and medium hotel respondents and all interviewees identified that training was problematic given the seasonal nature of the business. Notwithstanding, staff—their professionalism, attitude and competence seems to be a key problem for customers who comment on TripAdvisor.

Whilst many customers were highly satisfied by their experience of a particular hotel, others were often critical of that same hotel. One hotel was given an overall rating of 1 by a customer who commented:

> Place smelled a lot of cigarette smoke. There were cockroaches in the room. Not a good place to stay. Had to check out earlier than planned.

Another customer gave an overall rating of 4 for the same hotel commenting:

> Great food and great service—the personal touch and the friendliness of staff, willingness to help and excellent advice on places to visit made up for the inadequacies of small room and lift.

This example illustrates the variability inherent in service delivery and the importance of tangibles; cockroaches and cigarette smoke give an entirely unappealing message. Nevertheless, it could be the cockroaches were recent arrivals and the last guest broke a non-smoking rule. Effective recovery from service failure needs commitment, planning and clear guidelines (Lovelock & Wright, 1999). The example demonstrates how friendliness and intelligent personal service can improve the customer's experience of service and ameliorate failings.

These findings do not support the proposition that demanding and informed customers are creating an environment of improvement leading to excellence in all segments of the hotel sector (P3). Nonetheless, there are examples of hotels that are consistently providing excellent service. Our analysis suggests most customers who post negative comments are not particularly demanding merely seeking a reasonable quality of service.

4.4. The star grading scheme and associated standards is largely producer-driven (P4)

Respondents from large and medium hotels believe the star rating scheme is important in attracting visitors. Small hotels are less positive about the scheme. However, hotel respondents and interviewees indicated that 'service' was being lost in the focus by VisitScotland on the tangible aspects of the grading and classification scheme. The Training Advisor suggested the scheme should be split into product and service. She argued that:

> many places offer poor service but have a high rating because they fulfil the criteria in terms of physical aspects.

The Hotelier signalled there was nothing within the grading scheme which informed customers of the degree of customer orientation of hotels. Service awards have been won by his hotel, but are not included in its assessment rating as these are not part of VisitScotland's scheme. The QA Advisor intimated that Value for Money is not included in the assessment rating because it is too difficult to measure. Conversely, our findings suggest that Value for Money is a critical determinant for both customers and hotels. The QA Advisor stated that VisitScotland identifies and verifies customers' (hotels and visitors) expectations of service quality determinants by undertaking QA checks post-inspection and by surveying visitors every 2 years to gauge satisfaction on star rating experiences.

These findings support P4. The main grading and classification scheme is specified by VisitScotland with little input from hotels or their customers. The star grading scheme and associated standards is largely producer-driven.

5. Discussion

This study provides new evidence about service quality in the Scottish hotel sector. The sector is undergoing fundamental structural change and further standardisation of product offerings, whilst hotel management are faced with the challenge of delivering service quality to an increasingly demanding customer base. This study suggests that many Scottish hotels (mostly the small/medium category) are handling these challenges well. However, the findings indicate a lack of consensus regarding definitions and determinants of service quality across the respondent hotel sample (P1). This is not surprising given the diversity of establishments, market segments, variety of customers and constant evolution of the 'informed customer'. There is also a lack of consensus across chain hotels where marketing focus on the standardisation of product offering is common. Significantly too, responses reveal that 40% of respondent hotels are concerned to meet customer expectations rather than to exceed them. The step change between meeting and exceeding expectations is considerable, suggesting very different thinking across the sector as to what service quality represents. This perhaps confirms Self's (1997) findings that too many companies strive for 'OK.' Nonetheless, the study suggests that hotel customers are not looking for the world to change but simply a helpful, friendly and caring service.

The examination of TripAdvisor data suggests that a relatively high proportion of large hotels are achieving only poor to satisfactory ratings from customers across the determinants identified by hotel management as critical to service quality. In a competitive market this level of negative customer perception is a serious issue. It is the more concerning given that the study suggests the main difference between excellent and poor service is whether the hotel did (or did not) deal with problems and the presence or absence of personal service.

The research highlights the need for a more comprehensive understanding of service quality and raises three key issues for the Scottish hotel sector: understanding customer behaviour, the criticality of quality of information and the need for a common standard across the sector.

5.1. Understanding customer behaviour

The review of TripAdvisor data for P2 and P3 suggests that many customers are still seeking satisfaction on the most basic of establishment and service standards—accuracy of information, cleanliness, timeliness, cost, quality of product and attitude of the staff. Excellence in these cases is hardly the issue. Understanding the very basic personal expectations of customers with regard to both quality and service is crucial to understanding customer behaviour in the context of repeat business and recommendation. This is becoming increasingly important as competition intensifies. Whilst the large supermarket/hypermarket chains have evolved intelligent systems to understand individual and collective purchasing patterns and future needs (and become expert in rapidly meeting those needs) this study suggests that the large hotel sector seems unable to do so.

Changing lifestyles and more demanding customers are likely to promote the development of more specialised hotel enterprises and thereby intensify further and broaden competition. Increased specialisation of services facilitates differentiation thus permitting a premium rate. These markets are likely to attract multinational chains as other parts of the hotel (and catering) sector become over commoditised, less attractive in terms of quality and less profitable. In order to survive, hotels remaining largely in the commoditised part of the market can be expected to cut costs and homogenise the service/experience on offer, thereby losing differentiation value.

The survey identified that Personal Service was a key determinant for both hotels and customers (P2 and P3). Additionally, and correspondingly, large hotels received a negative rating on this determinant from customers. This also suggests that understanding 'individual' customer expectations must play a more dominant role for large Scottish hotels. Direct communication is a prerequisite of personalised and intelligent hospitality and service (Perry, 2003). However, it also exposes the service to very direct and personal customer feedback which needs to be addressed. TripAdvisor data and comments (P2 and P3) illustrated that only one hotel in the sample was making use of this communication channel.

The study does indicate that service quality and customer satisfaction are two different constructs. Customer satisfaction appears to relate to customers' feelings about the experiences and interactions with the hotel and its staff, whereas service quality can be 'tempered' by perceptions of location and value. The research also signals that satisfying customers may not be enough in this competitive environment. Hotel management have to improve customer perceptions of overall service quality by delighting their customers. This is the more important because of the growth of sites like TripAdvisor.

5.2. The criticality of quality of information

This research reveals that part of the experience gap results from inaccurate and limited information. At the point of booking, customers make a decision and develop expectations optimistically based on this information. There arises, therefore, a potential gap between expectations and reality. The gap becomes reality (more or less) only as the experience begins to unfold from the point of pick-up or arrival and check-in. The hotel providing the product/service does not know what the customer's expectations are or whether these are being met, until it is either informed by the customer or until it has processes to establish this for itself. Feedback information for any hotel is usually retrospective after the service experience has been concluded. The gap, between expectations and the actual experience, will continue until the quality of information provided by hotels about the product and service is well known, accurate, and consistent.

Location, relative to the main sights and city centre, was a frequently highlighted example of poor quality and misleading information on TripAdvisor. Whilst the need for the competitive 'hard sell' by hotels remains, the growth of 'short-breaks' also means that the customer has no appetite for getting it wrong if the service provider gives inaccurate or misleading information. Customers can switch easily to alternatives next time and do prolonged word of mouth (WOM) damage through feedback to websites, family and friends.

Websites such as TripAdvisor can help identify negative and positive customer experiences and can be used to narrow the information gap for hoteliers and customers although hoteliers will have to utilise these sites to gain any benefits. Website data suggest that hotels could do more to identify and solve customers' problems at the point of failure. Additionally, the risk of exposing the business to critical comment on websites which have a potential worldwide audience is damaging to the business. Notwithstanding, the nature of the Internet is such that recommendations and ratings are 'blind' to the reader and offer no real opportunity for the purchaser to consider the reliability of the judgements offered by, otherwise, unknown customers.

Additionally because services are generally high in experience and credence qualities there is more risk in purchase. This has several consequences. In particular, service customers rely on WOM rather than advertising and are strongly influenced by price, personnel and physical cues to judge quality (Kotler & Keller, 2006). This study signals the importance of a new form of WOM communication and underlines the importance of understanding WOM processes so that hotels can attempt to harness its power. Research on the management of online WOM activities is seriously under-developed and more formal research is required to fully understand the least formal (but high reputational impact) of all communication channels (Stokes & Lomax, 2002).

5.3. Need for a common standard of quality service across the sector

Marketing and communication strategies seek to position Scotland as 'the best small country in the world'. The existence of a publicly funded organisation such as VisitScotland is a positive step forward. Nonetheless, this survey has confirmed areas of weakness with VisitScotland's grading and classification scheme (P4). It indicates that the scheme attempts to rate specific tangible factor evidence, but to the detriment of real service quality indicators as perceived by both hoteliers and customers. This practice may direct hotels to the achievement of the 'badge' rather than achievement of service quality based on customers' expectations. Concepts of service quality often remain producer-driven, even in businesses which explicitly claim to give priority to customers.

VisitScotland does not assess Value for Money as reputedly this determinant varies for each customer. However, this study found a high degree of consistency in rating of Value for Money amongst customers on TripAdvisor. The authors believe that Value for Money can be evaluated in only one way. That is by, at the point of departure, asking two simple questions. Firstly, '*do you believe we have given you value for money?*' Secondly, '*if we have or have not, what were the critical success/failure factors?*' It seems reasonable that VisitScotland can encourage practice in this respect.

On the question of consistency of Standards, hotel responses identified supervision, constant training and monitoring as key practice (P2). However, there is a presumption in this that the 'standard' is well defined, consistently articulated and reinforced so as to answer the questions: *training for what? supervision of what? and monitoring of what?* The findings identified that there is a lack of consistency across the sector both in terms of definitions and dimensions of service quality (P1) and in service delivery (P2 and P3). Further, if the real need is to understand very personal, individual expectations, then the delivery of an intuitively personal service, person-to-person, must be a highly influential factor. Yet this appears to be without consideration for many hotels in the sample. Intuitively this may be of particular interest to the 'large' and 'budget' hotel chains where 'sameness of product, service and experience' is a specific business strategy. The philosophy is one of 'the customer knows what to expect from us and will experience that expectation' i.e. a focus on 'us' rather than 'on the customer.' However, if meeting personal needs is indeed emerging as a key differentiating factor in service quality, this implies that the 'us' focus of strategies will be leaving most customers dissatisfied to some extent all the time. This is confirmed by the relatively poor assessment by customers of large hotels, most of which are chains.

5.4. Limitations

This exploratory and grounded sample has a number of limitations. The sample is small and is limited to Scotland. A further limitation is that imposed by any interpretative study of the judgements made in the coding process despite the attention paid to this aspect of the survey. The determinants identified by hotel respondents are broad and it may have been appropriate to use one of the models identified in the research. However, the determinants identified in this study are similar to those in other research though all appear to offer a different emphasis.

6. Conclusion

This study identifies a number of issues that have relevance, not just across Scotland but across the hotel sector generally, although the relatively small purposeful hotel sample, signals that the findings have to be treated cautiously. In particular, the findings suggest that there is an "disconnect" between hotel respondents' determinants of service quality and customers' experience of these determinants in part arising from poor quality information. In the world of the 'informed customer' the quality of reliable and meaningful information at the point of purchase is a critical factor in closing this gap. The findings also suggest that most customers are not in fact overly demanding and are satisfied with a personal service which represents value for money and provides accurate information. The main difference between excellent and poor service relates to the absence of the personal touch and how staff deal or do not deal with customer problems.

Hotels need to recognise that Internet rating sites can be both a threat to reputation but also an opportunity. Seen as an opportunity, they can effectively manage the content by providing high quality, reliable but 'managed' information themselves. Also by encouraging customers to provide feedback at the point of departure, service feedback in areas vital to improvement becomes immediately available. However, this has to complement the quality intelligence gathered of the customer experience (throughout their stay) by highly focused, customer oriented staff. This ensures that the information available (much of it now outside the control of the product/service provider), tells a positive and reputation building story, mirroring the actual customer experience at the point of consumption. Currently much of the quality of information available at the point of booking is simply not up to the demands of today's 'informed customer'.

The research also indicated that concepts of service quality often remain producer-driven, rather than customer-driven. VisitScotland must develop a common service quality standard which secures consensus around definitions and determinants, which has the flexibility to cope with differing levels and determinants, but which also gives equal weighting to tangibles and intangibles.

Implicit in all this is a dilemma for the Scottish hotel sector. This can be summarised as a cross section consensus around definitions and determinants at one extreme, or a fragmented approach at the other, where establishments decide their own framework of determinants and definitions. The worst scenario is the confused middle ground of VisitScotland, AA, RAC and a multiplicity of other rating schemes overlaid by a multiplicity of internet based rating schemes. In this confused state whether customers win or lose is a hit or miss affair.

6.1. Implications for service managers

The study raises some fundamental implications for service managers. Customers are essentially delighted by certain basic behaviours including, 'helpful', 'friendly', and 'caring'. This suggests that the focus of training in 'behavioural' approaches to customer satisfaction will give a significant return in high contact encounters. The study also signals a need to focus on the individual customer which can again be linked to the behavioural approach and focused training. Additionally, hotel management have to understand the opportunities and threats brought by sites such as TripAdvisor and respond to this new generation of online evaluation. Finally, the study suggests the importance of quality and reliable information and its influence on redressing the experience gap.

6.2. Implications for further research

Further similar research of a larger sample is necessary to confirm the findings of this study before expanding the research to include a robust comparison across the UK hotel sector. It may be appropriate to utilise in later research one of the recognised models of service quality and its determinants. Additional research needs to be undertaken in online WOM evaluation and feedback and its impact on customer decision-making and expectation/experience gaps.

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