COMPETITIVENESS THROUGH QUALITY IN THE HOSPITALITY INDUSTRY - THEORETICAL ASPECTS AND MEASUREMENT METHODS IN THE INTERNATIONAL PRACTICE

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Abstract: In an increasingly competitive market, ensuring the quality of tourism and of hospitality industry services is very important for preserving or increasing the number of visitors. This is why companies in this industry are becoming increasingly aware of the importance of quality as a source of competitive advantage. The present paper attempts through a theoretical but pragmatic approach to identify the quantifiable elements taken into account in the tourism competitiveness and hospitality industry and the measurable elements of the quality level in this industry. The paper reviews the ways to quantify the competitiveness of tourism and of the hospitality industry based on the World Economic Forum's tourism competitiveness and hospitality industry index, as well as the main methods of quantifying the quality of services in this industry, with a focus on the SERVQUAL method. The main conclusions of the paper refer to the fact that due to the particularity of the hospitality industry and especially of the subjective factors that determine the qualitative level of the tourists' level, it is still difficult to standardize the quantification of quality in this industry. Also, even if we have identified in the literature a proposal to quantify tourism competitiveness and the hospitality industry including the Satisfaction of Visitors indicator, we have not yet encountered this indicator quantified globally.

Keywords: competitiveness, economic development, hospitality, services, tourism, business administration.

JEL Classification: O1, Z30, M1.

1. Competitiveness in tourism and the hospitality industry

The hospitality industry is much wider and more complex than ever, because we are often talking about a variety of sub-industries that encompass and on which it depends. *Hospitality* may include hotels, spas, resorts, restaurants, conference rooms and associated services, may include airlines or cruises, etc., a wide variety of companies that are really producing goods and services for very different markets.

Therefore, what is particularly important is that this industry generates a multitude of jobs, from waiter to transport operators, such as airlines and railways, buses, car rental, etc. Although investment in this industry is extremely diverse and complex, a key component is the service and human resources component (IGHM, 2015). Worldwide, about 1 in 11 people work in businesses with tourism and travel profile. In the US, over 14 million people are employed in tourism and the hospitality industry, and over 272 million worldwide, and the demand for hospitality services is rising at an unprecedented rate (IGHM, 2015).

In Romania, in 2015, the tourism activities turnover was only 9.3% of the total turnover. In 2016, investments in tourism amounted to 14,700,000 thousand lei, representing 8.1% of the total investments at national level, decreasing compared to the previous year. Tourism investment is projected to increase by 3.5% in 2017 and to increase by 2.6% per year in the next ten years to 19.800.000 thousand lei in 2027, which would represent 8.4% of total investments in Romania (WTTC, 2017). The investments made generated 197,500 jobs in the tourism industry, or 2.4% of the total number of jobs at national level. The WTTC report forecasts a total of 219,000 jobs in tourism in 2017, with the same percentage share (WTTC, 2017) and The Turism & Travel Competitive Report 2017 counts 189,769 jobs accounting for 2.2% of the total workplaces (T&TCR, 2017).

Now, more than ever, the hospitality industry offers opportunities to use new technologies, customer services and offers evolve, and competition is high, including

competition to attract talented employees. Success in hospitality requires a solid background in business management and a deep understanding of the services in this industry (IGHM, 2015).

Competitiveness in tourism is the ability to optimize the attractiveness of a tourism destination for both residents and non-residents in order to offer quality, innovation, specific tourism services to increase market share in the domestic and global market, while ensuring effective and sustainable use of available resources (Dupeyras, A. and N. MacCallum 2013).

To quantify competitiveness, the World Economic Forum, analyzes and prepares biannual reports on *The index of competitiveness in tourism and hospitality industry* (Travel & Tourism competitivitate Index - TTCI). It aims to measure the factors and policies implemented in different countries to increase the attractiveness and development of the Travel & Tourism sector (T&T). TTCI is based on **three major categories of variables** that facilitate the analysis of competitiveness in this sector, thus (T&TCR, 2017): The Regulatory Framework Index for the T&T Sector - captures those elements that are related to policy and, in general, activities within the government's sphere of action; Business environment in T&T, including infrastructure; Human, natural and cultural resources in the T&T sector.

Each of these three indexes is in turn composed of a number of pillars of competitiveness T&T (T&TCR, 2017): Policy rules and regulations; Environmental sustainability; Safety and security; Health and hygiene; Travel & Tourism Prioritization; Air Transport Infrastructure; Ground transportation infrastructure; Tourism infrastructure; ICT infrastructure; Price competitiveness in the T&T industry; Human resources; Affinity for tourism and travel; Natural resources; Cultural resources.

Table no. 1. The Travel & Tourism Competitiveness Index for Romania in 2013 – 2017

The Travel & Tourism Competitiveness Index	2011	2013	2015	2017
Position/place of Romania	63 (from 139 countries analyzed)	68 (from 140 countries analyzed)	66 (from 141 countries analyzed)	68 (from 136 countries analyzed)

Source: data collected by the author on the basis of:***The Travel & Tourism Competitiveness Report** 2013, 2015, 2017.

It can be noticed that Romania between 2011 and 2017 shows a depreciation of the Travel & Tourism Competitiveness Index, from position 63 in 2011 to 68 in 2017. Although the overall score is the same in 2015 (66th place) score 3.8 and in 2017 (place 68) general score 3.8, we note that the number of countries analyzed is different respectively 141 in 2015 and 136 in 2017.

For OECD member countries and partner countries, Dupeyras, A. and N. MacCallum have proposed a guide to quantify tourism competitiveness. This document proposes quantifying tourism competitiveness on the basis of key indicators to address the challenges of tourism competitiveness in OECD and partner countries. Thus, 11 basic indicators are proposed to measure competitiveness in tourism (Dupeyras and MacCallum, 2013): Gross Domestic Product in Tourism; Travel revenue per visitor on the market; Overnight stays on all types of accommodation; Exports of tourist services; Labor productivity in tourism - the main dimension of competitiveness; Purchasing power parity in tourism and price level; Costs and price levels of tourist services are among the most

important factors of competitiveness; Obligation of entry visas in the country; Natural resources and biodiversity; Cultural and creative resources; Satisfaction of visitors - is an important qualitative indicator on the demand side; National Tourism Development Plan - a Competitiveness Indicator that recognizes the existence and quality of the implementation, effectiveness and evaluation of tourism sector at national level.

As can be seen from the two large categories of indicators used or proposed to quantify competitiveness in tourism and the hospitality industry, only within the indicators for quantifying the competitiveness of a tourism destination, proposed for the OECD member countries, we explicitly identify the indicator - *Visitor satisfaction*, which we consider to be relevant in quantifying the quality from the perspective of the travel services client. Regarding this indicator, the authors point out that the main challenges in the quantification of this fundamental demand-side indicator and extremely important in terms of understanding consumer preferences, the value of future experiences and intentions, is how to collect visitor satisfaction and intent repeating visits (Dupeyras and MacCallum, 2013).

2. Quality in the hospitality industry as a competitive advantage

In an increasingly competitive market, service quality assurance is very important and is increasingly influenced by a number of factors such as the expansion of consumers' rights and the alleged emergence of a growing number of quality conscious tourists. In addition, greater competition provokes firms in this industry to become more and more aware of *the importance of quality as a source of competitive advantage* (Kapiki and Soultana, 2012).

Globally, there are national strategies or transnational strategies, especially for corporations, which require certain standardizations applicable in several countries to ensure consistency in management and quality. However, at the local level there are a lot of small business, for which management can not necessarily apply a standardized model, it needs to be very personalized according to needs and local specifics.

If we look at growth and growing opportunities in developed countries, we notice marked differences in developing countries. In these countries, investments and investors, capital owners, create opportunities, create jobs, develop, but become interested only if governments invest in infrastructure: they invest in airports and roads and other networks and actually support their investments domain and not only (IGHM, 2015). Creating infrastructure often generates multiples for an economy. In many developing countries, hospitality has not been understood as strategic, more importance has been given to extractive or processing industries, but it should be aware that not all countries have resources, and hospitality and tourism could be the engine of development for the whole community.

3. Quality measurement in the hospitality industry

Quality in the hospitality industry is a complex notion that can be defined as an expression of the degree of social use of a service and reflects the extent to which the service satisfies the need for which it was created by all its features, respects the society's constraints on efficiency economic and environmental protection (Miclău, 2006).

The concept of quality is widely discussed in hospitality management. Quality in the hospitality industry is defined as the consistent delivery of products and services to guests according to the expected standards. More and more, guests are willing to pay more when they visit locations that offer services that meet or exceed their expectations. The quality of the service is an important factor in the visitor experience during the stay visits (Hayes, Ninemeier and Miller, 2011). Managers must recognize the importance of keeping

customers, as attracting a new customer is considered to be more expensive and time consuming (Reyad, 2005).

At present, the quality of products and services addresses systemically the customer relationship, using the Total Quality Management (TQM) concept, which aims to optimize processes throughout the chain of creation and provision of services or products, starting with market studies to identify needs, to after-sales services (Saunders and Graham, 1992). The quality of services can be analyzed by addressing the following issues (Plumb and Ionescu, 2004): the quality of the result, the quality of the process, the quality of the conformity, the quality of the contact, the affective quality.

Therefore, the quality of tourism services and the hospitality industry implies the ability to provide complex, standards-based services to have control over the activity at any given time, the ability to solve the problems that may arise during the course of the service.

In the literature, there are several criteria for determining the quality of services such as: professionalism and proper qualification of the company's employees; the attitude and behavior of the staff, the interest in solving consumer problems; accessibility of the company headquarters and flexibility of the operating program; safety and confidence that the service will be performed according to the firm's commitments; the ability of the firm to solve unforeseen problems; the reputation and credibility of the firm, the conviction of the consumer that the firm provides valuable services (Cetin , 2001).

The quality of services depends on a number of factors that *influence the quality of the service provided* whether we refer directly to services offered in tourism or those offered in the hospitality industry in general (Berry and Parasuraman, 1991)*: credibility -* involves delivering as accurately as possible the service, honoring promises and executing it in the best conditions; *the tangible quality feature - or tangibility -* is the visible parts of the service: buildings, equipment, appearance of contact personnel, ambience, equipment, etc. which are physical indicators that express the nature of the service itself; *maximum responsibility on the part of the providers; kindness; empathy.*

For tourism services and the hospitality industry, quality measurement can be done from two perspectives: from the perspective of the company and from the customer perspective.

From the company perspective, are used: objective quality measurement methods (statistical control method, cause-effect analysis) and subjective methods of measuring the quality of tourism services and the hospitality industry (analysis of error possibilities, survey questionnaires to measure expectations and customer claims).

From the perspective of the client of tourism services and the hospitality industry, for measuring the quality of services, we use: *objective methods of customer assessment* (silent shopper method or mistery shopping) and *subjective quality assessment by customers methods* (the method of measuring service characteristics - consists of interviewing clients in relation to the appreciation of the quality of the service as a whole).

Companies concerned with quality of service use various methods of research on quality (Cetin, 2001): selective post-transaction research; total selective research; analyzing consumer satisfaction; focus groups, employee reports, selective employee research, complaints management (Some an, 1998).

Although there is no unit in measuring service quality, there are several tools or measurements, such as SERVQUAL, SERVPERF, INTSERVQUAL and INSQPLUS. To measure the quality of services in the hospitality industry, there are several methods, such as DINESERV - used in restaurants, CASERV - is used in the casino sector, HOLSERV and LODGSERV are used in the accommodation sector. Other measurements, such as INTQUAL and INTERSERVQUAL, are used to measure employees' perception of service quality (Al-Ababneh, 2017).

Due to the specificity of the hospitality services, a specific model for measuring the quality of services called SERVQUAL has been introduced. The SERVQUAL scale has become the most popular tool for measuring the quality of tourism and hospitality services. The SERVQUAL model assesses customer perceptions of service quality based on discrepancy between customer expectations and perceptions. SERVQUAL has different features to evaluate both customer perceptions and expectations regarding service quality in the hospitality industry.

Most experts agree that customer expectations rarely depend on a single aspect of the service package but rather on several aspects (Berry, Zeithaml and Parasuraman, 1985; Johnston and Lyth, 1988; Sasser, Olsen and Wyckoff, 1978). Studies conducted on focus groups with service providers and their customers have highlighted the following determinants of service quality (Parasuraman, Zeithaml and Berry, 1985; Berry, Zeithaml and Parasuraman, 1985): access, communication, competence, courtesy, credibility, reliability, reaction, security, understanding and tangible. These have been reviewed and revised, and five dimensions of service quality are now established: tangible, reliable, responsive, assurance and empathy - dimensions underpinning the SERVQUAL method (Parasuraman, Zeithaml and Berry, 1988; Zeithaml, Parasuraman and Berry,1990).

The SERVQUAL method involves measuring the expectations and perceptions of consumers by using five assessment dimensions, which include about 4-5 evaluation items (Parasuraman et al., 1988; Parasuraman et al., 1994). This tool is implemented twice, the first time to measure customer expectations and the second time to measure customers' perception of service. The SERVQUAL method is the most commonly used and quantifies quality aspects such as (Bruhn, 2001): acceptability of the tangible environment; reliability, trust, sincerity; availability and receptivity; competence and certainty; empathy (***The Basis of the Servqual Model).

The SERVQUAL method is based on the following three major issues (*** SERVQUAL Model Presentation): *The five loopholes (GAPs)* - which create a gap between customer expectations and services delivered by the bidder; *Causes and resolution of the 5 GAPs* - identify the causes and find the best ways to fix them; *Essential dimensions of the service* - identifying those issues that ultimately enable a quality service to be delivered to the targeted target group. SERVQUAL offers the possibility to identify the 5 gaps (gaps) the organization needs to identify and correct (***SERVQUAL Measuring quality of service): Gap 1: Customer service expected vs. managers' perceptions of customer expectations; Gap 2: Manager's perception vs. current customer experience; Gap 3: design and customer service standards versus actual service provision; Gap 4: What is the client's experience vs. what / how to communicate with customers? Gap 5: customer perception of experience versus customer's expectations regarding the service offered.

The reasons for the emergence of gaps (*** The Basis of the Servqual Model): GAP 1 Not knowing what customers expect; GAP 2 Service quality standards are wrong; GAP 3 Service performance is deficient; GAP 4 When promises do not match the service offered; GAP 5 Differences between customer perception and expectations.

Other methods used to measure the quality of tourism services and the hospitality industry are: *story-telling method* - customers are asked to freely tell, unstructured, without answering any specific questions about their past experiences with the company's offer of services cause; *the sequence scrolling method* - seeks to identify the strengths and weaknesses of each service delivery process by dividing this process into component elements, and then analyzing in detail each of these elements; *the critical incident method* - is based on highlighting events that the client feels, lives them either as being particularly pleasant or particularly unsatisfactory in their direct relationship with the provider.

Following customer response analysis, a situation can be highlighted on areas where improvements are needed (Bruhn, 2001).

Thus, in summary, we must remember that the methods of measurement and control of the quality refer basically to the so-called *quality standards of the client*, namely *the quality standards of the bidder*.

The specialists in the study of consumer behavior appreciate that all recent research supports the idea that it is particularly important to know the satisfaction or dissatisfaction of potential consumers, as it severely affects their position on the market (Mihu and Pop, 1996).

Therefore, the quality of the hospitality industry depends on the following determinants of the perception of the quality of a service, based on the criteria used by consumers for assessing the service (Parasuraman, Zeithaml and Berry, 1988): accessibility of the service; credibility; the degree of knowledge and understanding of the needs of consumers; trust in the service received; safety; the competence of the staff; correct communication of the content of the tourist service; courtesy of tourism staff; sensitivity of staff, hospitable, prompt and operative; ambiance, technical endowments, etc. However, the greatest influence in increasing the level of consumer satisfaction is determined by the characteristics of the hotel and the characteristics of the staff (Radojevic, Tijana; Stanisic, Nemanja; Stanic, Nenad, 2017).

Considering these aspects, which the consumer takes in shaping the perception of the quality of tourism services and of the hospitality industry, it should be noted that, from the point of view of the supplying company, the quality management activity should be managed taking into account the collaboration between the following activities: development of tourism services; the support system for tourism services; the distribution system for tourism services. Without very good coordination between these types of activities, deficiencies in the provision of quality tourism services may occur.

According to the international report World Travel Market Global Trends (WTGT, 2014), most tourists demand more and more personalized services, being accustomed to finding various online options that open up a new, vast market. Consequently, according to the Euromonitor study, tourism future offers will contain tailored personalized services and concierge travel offers to the middle-income market, allowing industry players to differentiate their products at lower prices (WTGT, 2014).

In Romania, only 7% of the existing hotels are affiliated to international chains, compared to 22% in the European Union, so Romania offers good investment opportunities. The offer of luxury or medium - high hotels in small and medium-sized localities is much smaller than in the capital (WTGT, 2014). Nearly half of the hotel offers, or 1,104 hotels in all segments, is covered by two-star locations, which outlines an essential aspect of the quality level generally offered in Romania. (WTGT, 2014).

Also, to ensure quality services in the hospitality industry must be considered the level and quality of infrastructure, airline performance as well as the tourism development strategies implemented by the authorities. Although the development of tourism infrastructure is essential for increasing the competitiveness of the Romanian tourism industry on the international tourism map (Ministry of Tourism, 2016), at the level of the basic infrastructure, Romania occupies the 54th position in 2017, compared to the 50th position occupied in 2016 (IMD World Competitiveness Center, 2017). Also, regarding the number of registered tourists, Romania ranks 57th, being an indicator listed as a weak point in the analysis of competitiveness.

The competitiveness of companies active in the tourism and the hospitality industry in Romania can be increased by transferring technology and know-how, by implementing

good practices in quality, by implementing quality management system procedures, by capitalizing on human, technical, technological and natural capacity.

4. Conclusions

Tourism and the hospitality industry are indissolubly linked to the concept of quality services. The assurance of quality is a long-term approach and managers should identify, analyze the cost-benefit impact, and prioritize improvements in service quality if they want to be competitive.

Although specialists identify a direct link between the quality of tourism services and the hospitality industry, there are gaps in the quantification of this issue.

After reviewing the methods of quantification of tourism and hospitality industry competitiveness on the basis of the World Economic Forum's tourism and hospitality industry competitiveness index, as well as the main methods of quantification of service quality in this industry with a focus on the SERVQUAL method, it was found that due to the particularity of the hospitality industry and especially of the subjective factors that determine the quality level experienced by the tourists, the standardization of the quantification of quality in this industry is still difficult. Also, even if we have identified in the literature a proposal to quantify tourism competitiveness and the hospitality industry including the Satisfaction of Visitors indicator, we have not found this indicator quantified globally up to this point.

 As we have seen, there are various methods of quantifying the quality and perception of tourism services, but it is essentially known that tourists perceive the quality of hotel services, for example through price, comfortable rooms, friendly staff and a tasty menu. Also essential for the future of the hospitality businesses is customer satisfaction, customer retention and indirect advertising based on customer recommendations.

Both for existing businesses in the tourism and hospitality industry, and for those who want to invest and enter the market, the quality of the services offered must be a priority objective. Very strong competition, especially on developed countries but also on emerging markets, in the current context of globalization and access to information, calls for a level of quality that meets the demands of millions of tourists traveling every year in the world to destinations where they have certain expectations.

Each consumer has certain expectations that can be expressed by the desired level, while the accepted level expresses the level that the consumer considers sufficient. Firms offering services that do not meet these expectations will gradually lose their customers, with their market share shrinking, while firms that provide quality services to standards will be successful both in terms of customer loyalty, increasing market share and profitability.

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