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Aims and scope

Research in Hospitality Management (RHM) is a peer-reviewed Open Access journal publishing articles that make an original contribution to the understanding of hospitality and to the theory and practice of international hospitality management. The journal focusses on three main areas: (1) "Hospitality (Management) Studies" includes articles related to the study of and the study for hospitality. The study of hospitality refers to studies about the essence and ethics of hospitality from a social sciences perspective, while the study for hospitality refers to a more disciplinary approach according to the quintessential managerial areas of Finance, Human Resources, Operations, Marketing & Sales, and Technology; (2) "Hospitality Management Education" is devoted to articles about curriculum content and delivery methods for training and educating hospitality managers. Considering the size and scope of the hospitality industry, and the number of staff and students involved, studies on efficient, effective, and innovative ways of developing hospitality competencies are considered indispensable; (3) "Student Research Projects" allows excellent student work to be published. Student work can relate to excellent BA dissertations or MA theses. *RHM* also accommodates short communications, working papers, book reviews and discussion papers.

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Editorial

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Welcome to the first issue for 2022 of *Research in Hospitality Management*. We were pleased that last year our double-blind peer reviewed journal published three issues. We hope to sustain this growth with the continued support of scholars submitting high-quality academic work to share through this open access publication.

This issue contains contributions on well-known themes as well as a new innovation that we believe will make this journal a valuable teaching resource as well as a way of sharing your research — read on to find out!

Piso's article on working hours in the UK hospitality industry provides much food for thought at a time when many businesses are struggling to find staff post-COVID. An experimental study by **Ijsselmuiden** tested the quality of Dutch wines compared to those from renowned wine producing regions; we are pleased to publish the first academic publication of this emerging researcher. **El Hajal** continues his investigation into the future of jobs with a study of teleworking.

We welcome the study by **Fowler** on the impact of COVID-19 on the hospitality industry, particularly because this contribution comes from the USA, demonstrating that the reach of our journal is expanding. Airbnb is a topic previously addressed in this journal, but in this issue **Issaka, Bansah and Kuuder** report on a study in Accra, Ghana. **Westerlaken, Hendrawan and Yuni** warn that the current dolphin-watching activities in Bali, Indonesia put the whole hospitality revenue for the village of Lovina at risk and argue for a change before it is too late.

Pahus and Sunesen investigate Big Data in their qualitative study of twelve European destinations, reporting on the views of data experts who urge researchers to share their data for maximum impact. In addition to qualitative studies, we also present an economic study by **Vancells and Duro** of the Catalan tourism subsystem. **Velthuis** lays out his thinking about commercial friendships and shares his proposed PhD research framework.

We are also pleased to once again showcase student work. **Bolm, Zwaal and Braz's** article on mindfulness is the outcome of a collaboration between a Bachelor student and her supervisors. **Spenkelink, Westerlaken and Suleri** reflect on the impact of rebranding on the various stakeholders involved.

The innovative new feature is a tutorial on the Delphi technique by **Naisola** who used this approach in her PhD and now offers a tutorial here that others can use in their teaching or research. If you have other methodologies that could be shared with others then do please contact the editors to suggest them.

A reminder that the deadline for our next issue is the end of July 2022 for publication in September. The Hotel Management School at NHL Stenden University continues to fully fund this open access journal so there are no article processing charges for authors.

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RESEARCH
ARTICLE

Controlling the clock: Working hours in the UK hotel sector

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ABSTRACT: The hotel sector is synonymous with working hours that are long, unpredictable and result in poor outcomes for employees. Arguably, they constitute one of the most significant features of the employment relationship, yet little research exists to explore the factors influencing the scheduling of hours and the degree of control employees can exert on their pattern of work. This article aims to help fill this gap by exploring what shapes employee working hours and the extent to which each side of the employment relationship exercises control. Qualitative research was conducted with purposive sampling used to identify and interview employees in the UK hotel sector, combined with managers responsible for budgetary control over labour and for setting work schedules. The findings suggest that a combination of customer demand patterns and the choice by employers to minimise labour costs effectively reduce employees' ability to control or challenge work schedules. The lack of employee voice is structured into the employment relationship, depriving workers of a healthy work-life balance, their ability to take breaks and legally entitled pay.

KEYWORDS: employee relations, employee voice, hotels, work schedules, working time control

Introduction

The ability of employees to regulate the duration and pattern of their working hours is paramount in shaping their experience both in and outside the workplace. Numerous studies have indicated that absence of control is strongly correlated with detrimental impacts on employees' work-life balance and physical and mental well-being (see, for example, Spurgeon, 2003; Albrecht et al., 2017; Albrecht et al., 2020). More specifically, evidence from several countries indicates that lack of control over working hours by workers in the hotel sector contributes to some of the highest incidence of work/family conflicts in the economy (Van Wanrooy et al., 2013; Swanberg et al., 2014) and is positively associated with interpersonal conflict and even violence (McNamara et al., 2011).

There is little, if any, evidence, however, to suggest that workers in hotels are able to exercise any significant control over their working time. Long working hours have for many years been synonymous with the sector (Houtman et al., 2002; Cullen & McLaughlin, 2006; Messenger et al., 2007; Dienstbühl et al., 2008; Chiang et al., 2010; Lawson et al., 2013). Indeed, a number of studies indicate that hotel employees view long working hours as *the* means of securing job security and promotion (Van Wanrooy et al., 2013; Wong & Ko, 2009). In addition, the erratic scheduling and variable patterns associated with hotel work (Bohle et al., 2004; Cleveland et al.; 2007; Deery & Jago, 2015) can further exacerbate such problems. Early mornings, late nights, weekends and split shifts all form part of the common work experience in hotels and may contribute to a number of factors associated with poor lifestyles such as disturbed sleep patterns, unhealthy and irregular meals, lack of exercise and disruption in family and social life (Bohle et al., 2004). Research by the Joseph Rowntree Foundation indicates that UK hospitality workers work the most unpredictable shift patterns of any industrial sector in the UK, with just under a quarter of workers notified about changes to their shift patterns no more than one week in advance (Hay, 2015). It is hardly surprising then that hotel employees are likely to view their working time as one of the most pressing issues of their employment (Gamor et al., 2014) and that, combined with pay, time features strongly in hotel employees' perception of what makes for good or bad employment (Hay, 2015).

For employers, however, many of the features of working time discussed above incur significant advantages. For example, a study exploring the link between productivity and flexible use of labour in the hotel sector found that effective utilisation of employees was significantly correlated with lowering labour costs (Park et al., 2016). A study on employment casualisation in the Australian hotel sector illustrates the contradictory effect of employer practices more clearly. Whereas for employees the impact of unpredictable work schedules and low wages resulted in a high degree of powerless and a deleterious effect on self-esteem, the impact on employers provided significant advantages by helping them to respond more successfully to the ebbs and flows of demand (McGann et al., 2016).

This suggests that working hours are not an abstract phenomenon, but a feature of the employment relationship that is likely to be heavily contested (Rubery et al., 2005; Blyton, 2011).

Arrowsmith and Sisson (2000) argue that, combined with pay, they form the most fundamental component of an employee's contract and play a key role in defining their relationship with management. As illustrated above, the importance of working hours for employers and employees therefore is likely to be different. For employers, working time is not only crucial in the delivery of goods and services, but is a key variable in making labour as productive as possible (Rubery et al., 2005). According to Thompson (1967), this creates a distinct meaning of time for employers; time does not simply pass in the context of work but becomes a "currency" that is spent, thus creating monetary value for the employer. For productive labour to occur, working time therefore needs to be measured and regulated.

In contrast to employers, the significance of working time to employees is important not only in terms of the work/pay bargain struck, but is likely to be a more subjective experience forming the boundary between work and non-work time (Rubery et al., 2010). Personal factors external to the work domain are likely to have a significant influence in how individual employees view their working hours. With one of the lowest average earnings rates in the UK economy (People 1st, 2015) hotel workers face significant pressures to work long hours and to accept the fluctuations in scheduling, limiting their ability to control starting and finishing times (Wong & Ko, 2009; Swanberg et al., 2014).

Control over working patterns is therefore fundamental in determining to what extent the interests of either management or workers are served. Indeed, evidence suggests that the ability of employees to gain a degree of control over working hours may be key to reducing risks to health and well-being and assist work-life balance (McNamara et al., 2011; Näswall et al., 2015; Albrecht et al., 2017). This may be particularly problematic in industries such as hospitality where casualisation is such a common feature of employment.

Despite the central importance of working hours to hotel employees, there has been little examination of the factors that shape working time arrangements and the subsequent control employers, or employees, are able to exert over this process. Several studies have focused on the issue of work-life balance for hotel employees and, though not directly focusing on how employees and employers interact to shape working patterns, they indicate that hotel employees tend to exhibit little control. For example, an in-depth study by Lambert et al. (2012) on scheduling patterns of low wage workers in America, including those in the hospitality sector, suggests that any control employees may seek to exert on work schedules both compromises their earning potential, places their employment at risk and causes insecurity among fellow workers. Similar findings have been noted by Bohle et al. (2004) and Wong and Ko's (2009) studies on employees' work-life balance issues in the Hong Kong and New Zealand hotel sectors respectively, indicating an implicit acceptance by hotel employees of long working hours as a way of keeping their job. A more generalised examination of the ability of hospitality employees to exercise control over work shows that this can both help employees prosper at work and positively affect family relations (Xu et al., 2020).

The aim of this research is to add to this literature by focusing more explicitly on the employment relationship. Its central aim is to explore the factors shaping working hours and scheduling practices in the hotel sector. It examines the extent to which employers and employees are able to exercise control over working hours as well as understanding the context in which this takes place. The focus of the study is the UK hotel sector. This context is important to understand as research clearly illustrates that context matters when understanding the variations in employees working hours. Several factors have been proposed to explain the variation in working time arrangements and the extent to which these pass control to either employers or workers, and these will now be explored.

Literature review

Drivers that shape the reality and control over working time arrangements

Rubery et al. (2005) argue that, where possible, employers will always attempt to maximise workers' effort in relation to wage costs and increase control over the actual deployment of employees' time, but that this can be mitigated against by a number of influences. According to a number of different studies (see, for example, Arrowsmith & Sisson, 2000; Berg et al., 2004; Messenger et al., 2007; Rubery et al., 2010), three broad areas come together to determine the pattern of working time arrangements and help explain variations in control: management and trade union strategies, the level of state regulation, and specific sectoral product and labour market conditions.

The most important of these historically appears to be the impact of effective trade union action and collective bargaining. According to Messenger et al. (2007), unions have played a pivotal role in both rephrasing the debate towards the social cost of long hours and establishing collective agreements that have simultaneously regulated employees' working time and pushed the case for legal control measures. In particular, collective-based agreements based on maximum hours have been instrumental in that they cover both unionised but also unorganised employees. State regulation has often come as a result of union intervention. The nature of the product market and the management strategies deployed clearly add to this dynamic. The highly variable nature of customer demand for hotel services provides specific challenges for management in both deploying and scheduling the precise number of workers at specific times (Cauthen, 2011).

Rubery et al. (2005) argue that the specific configuration of these factors has created three models of organising working time in Europe: the employer-led model, the European industrial relations model, and the traditional UK industrial relations model. The latter two are both shaped by the intervention of trade unions and to some extent legal regulation, but they differ in their acceptance or rejection of recognised free time and the existence of part-time employment. Whereas the European model makes a clear distinction between work and non-work time, by setting maximum hours where any extra time worked is taken as time off in lieu, as opposed in the UK where excess hours are worked as overtime, with the UK model less likely to offer workers protection on these issues. The employer-led model, however, is the one that appears to most closely match the arrangement of working time in the UK hotel sector. Rubery et al. (2005) argue that this model presents employers with an almost perfect setting. Unrestrained by trade union and legal intervention, they can tailor working hours around the needs of the business with the expectation that workers will be entirely flexible and therefore lacking in any voice. Research carried out by Berg et al. (2014) on the range of working-time practices

that exist internationally provides further support for these models. Their study indicates that differences in working time arrangements arise out of the "contested terrain" (Berg et al., 2014, p. 807) of the employment relationship and that variations across the globe stem from three potential configurations: the strength of bargaining between employer and employee representatives, the level of control employers exercise over working-time practices, and the degree of state intervention in regulating working time.

Trade unions and employee voice

According to Berg et al.'s (2014) study, effective trade union intervention provides employees with both reliability in working hour arrangements and the ability to adapt working hours more effectively to suit individual needs. Scant evidence, however, exists to demonstrate that union regulation or even union existence has had much, if any, impact, either in the UK's hotel sector or internationally. According to the most recent UK Workplace Employment Relations Survey (WERS) (Van Wanrooy et al., 2013), trade union membership in the UK hotel sector stands at just 3%, the lowest of any industrial sector, and both formal and informal mechanisms for employee representation and communications between line managers and employees rank among the worst in the economy (Van Wanrooy et al., 2013). Indeed, according to Wood (2020), employer hostility to trade unions is a persistent feature of the hospitality sector. In addition, the UK sector is less likely than any other to have formal procedures in place to deal with individual grievances (Van Wanrooy et al., 2013). This has arguably contributed to a style of management which has traditionally been associated with "unbridled individualism" (Lucas, 2004, p. 226) where employment is vulnerable and where management are able to exercise the "whip hand" over their workforce (Lucas, 2009, p. 42). According to Lucas (2009) and Marchington and Suter (2013), certain characteristics of the hospitality industry's product and labour market conditions connected to how working time is organised, such as the existence of shift patterns, can prohibit any sense of collectivism, despite evidence among employees of a "hidden desire" for unionisation (Lucas, 2009, p. 51).

The absence of formal mechanisms that would otherwise enable employees to exercise at least an element control over their working time suggests a very high level of dissatisfaction among hotel employees. However, this is not necessarily the case. Data from the 2011 WERS, for example, reports very high levels of satisfaction among hotel employees over decision-making, particularly in smaller enterprises, combined with the highest satisfaction levels over employee management relationships in the economy as a whole (Van Wanrooy et al., 2013). In addition, research by Marchington and Suter (2013) into the restaurant industry suggests a strong preference among management and employees for more informal style of communication, such as one-to-one discussion between managers and staff. Their research indicates that the very hands-on nature of management and their close working proximity with employees facilitates this approach. Similar findings are reported in Townsend et al.'s (2013) study into formal and informal employee voice channels in a non-unionised Australian luxury hotel, where a combination of factors, employees' unease at raising issues in a public forum, the reality of shift patterns and 24-hour opening, combined with different nationalities' language and cultural factors, inhibit more formal mechanisms, with employees reporting a preference for dealing with managers directly. The focus of these studies, however, is too general to indicate that such informal mechanisms might provide hotel employees with a greater degree of control over the allocation and scheduling of their hours. Indeed, where studies focus more specifically on understanding both the input of employers and employees in working patterns, they indicate that having a greater say in such matters is likely to jeopardise future earnings and employment (see, for example, Lambert et al., 2012).

Though the evidence is extremely slim, there are instances where trade union presence and activism has resulted in meaningful differences to employment conditions for hotel workers. For example, workers in New York experience wage levels and conditions that far exceed those of their counterparts in other parts of America and the UK (Gladstone & Fainstein, 2003; Chakrabortty, 2014). More specifically, Lambert et al.'s (2012) study of hotel scheduling practices in Chicago found that union presence in some Chicago hotels ensures that casually employed housekeeping staff are paid for a full eight-hour day for any day worked, therefore minimising at least some of the insecurity associated with such contracts. Mere union presence, however, does not necessarily guarantee more effective intervention on issues around working hours. For example, Farrell's (2012) study on work-life balance issues in Irish hotels indicates that unions either do not or cannot always actively intervene around such issues, in part at least, where union density levels are relatively low.

The nature of the hotel product market and management strategies

Rubery et al. (2010) point out that service sector employers are more likely to resort to greater flexibility in scheduling workers' hours as they are unable to store the product of their labour. This is particularly problematic for hotel employers as those employees in customer-facing roles are only financially productive when engaging with guests.

In hotels, such demand patterns are complex and, according to Lai and Baum (2005), necessitate accurate forecasting by managers that circumvent major problems in scheduling workers hours. This is likely to be challenging as different levels of demand will vary not just across the hotel, but also between different departments. Therefore, management are faced with the challenging task of organising working hours not only across time, but also because of distinct patterns of consumer demand during the week and day. Research by Guerrier and Lockwood (1989) illustrates that customer segmentation, for example, catering for both business and leisure guests, is likely to result in different mid-week and weekend demand patterns as well as creating distinct patterns of demand for different departments in the same hotel. Additionally, guests may book a room, but predicting whether or when they might use other hotel services is more difficult. Scheduling patterns are therefore likely to vary considerably even within the same hotel. A study on working arrangements in Sydney hotels found that long and irregular work patterns were not uniform, but depended on the type of operation, with housekeeping and food and beverage subjected to much greater levels of unpredictability and stress than the typically 9-to-5 operations of the HR and accounting departments (Cleveland et al., 2007).

Management's response to such fluctuations therefore is typically to create working patterns that are flexible and can

work around the needs of the business. According to Rubery et al. (2010), responding to the variable nature of customer demand is much simpler for employers where a large number of workers work non-standard hours, as they do in the hotel sector, than where work is contracted as full-time and permanent, as this allows employers to respond to consumer demand more flexibly. Rubery et al. (2005) therefore argue that the use of such flexible scheduling becomes an important means by which management can restructure the relationship between workers' pay and productivity. A study exploring the relationship between demand, productivity and flexible working in UK hotels found that between 6 and 13% of productivity was linked to effectively deploying staff (Park et al., 2016). Hotels will therefore typically use a combination of full-time, casual, agency and outsourced staff to control labour costs. However, matching the demand on hotels service exactly to the supply of its workers is, according to Riley et al. (2003), not without its problems, as drives to increase worker productivity are limited by the need to keep a core number of employees to meet service requirements, regardless of customer demand levels. The response to this in many hotels is to combine the use of numerical flexibility, varying the quantity of labour deployed through different contracts, with functional flexibility, deploying staff between different departments.

Research indicates that this configuration of working patterns creates different control issues for hotel workers on different contracts. Research by Lambert et al. (2014) describes three defining features attributed to service sector employees' working hours that are more or less likely to be experienced dependent on the nature of an individual worker's contract: rigidity; unpredictability of working hours; and instability. Therefore, whereas full-time employees' concerns are more likely to centre around the volume of hours worked (McNamara et al., 2011), casual workers are more prone to report greater variability in their scheduling (Bohle et al., 2004; Lambert et al., 2014; Swanberg et al., 2014) as well as receive less advance notice of rotas that are likely to be subject to change (Cauthen, 2011). Interestingly, Head and Lucas's (2004) research into employee relations in non-unionised hotels demonstrates how employees on different contracts may also be subject to different managerial approaches, with core employees more likely to experience a more lenient approach by management than those on zero-hour contracts.

State intervention — the law

Legal intervention is a key mechanism by which employees can constrain the control employers are able to exercise over their working lives (Supiot & Casas, 2001) and arguably may offer hotel workers a last line of defence against unscrupulous employers in the absence of rigorous employee voice mechanisms. In the UK, the Working Time Regulations (WTR) exists to protect employees from excessive and demanding work schedules. Key elements include limits on the average working week, the right to paid leave, entitlement to weekly and daily rest periods as well as specific regulations for young and night workers. However, according to Ram et al. (2001), the WTR, which was introduced by the Labour government in 1998 as part of the European Union Working Time Directive, was specifically designed to allow employers to adjust the terms of implementation. For example, one of the most well-known elements of the legislation, limiting the working week to 48 hours, was diluted in the UK to allow employers to opt individual employees out of the limit as well as allowing them to calculate employees' hours over an average 17-week period. Research by Barnard et al. (2003) in five UK industrial sectors uncovered widespread use of this clause. Interestingly, they found that the practice of opt outs in the hotel sector was restricted to supervisory and managerial staff, where the take-up was almost 100%, with only very limited use for lower-level employees

The only study to specifically examine the impact of the WTR in the hospitality industry demonstrates that this weakness in design combined with the flexible nature of work in the industry has made the legislation virtually irrelevant (Hurrell, 2005). Indeed, the need to maximise flexibility and keep labour costs low are the very factors that, according to Head and Lucas (2004), drive hotel management to ignore employees' basic employment rights.

Research approach

A qualitative research design was adopted for this exploratory study, enabling a more nuanced and richer set of findings unconstrained by researcher-imposed variables. Purposive and snowball sampling were used to identify two groups of appropriate participants: managers and employees. Managers in chain hotels were chosen as they are more representative of the work experience of employees and more likely to adopt formalised HR practices to manage their employees. Of the management group, a total of eight were interviewed, located in four hotels in the north of England. In each hotel, the senior manager with overall responsibility for budgeting and scheduling of labour was interviewed. In three of the hotels, this was the general manager, and in the remaining hotel, the HR manager. In addition, the food and beverage manager of each hotel was also interviewed. With closer day-to-day supervision over employees and closer involvement in the shaping and scheduling of rotas, they were able to comment on the interaction and involvement of employees and managers in determining working hours. Food and beverage (F&B) is a department that is associated with the most typical patterns of work in the hotel sector, and that most accurately reflects the problems identified by Riley et al. (2003) in matching labour supply to demand.

Given the potentially sensitive nature of the topic, and the challenge in seeking participants that would be prepared to comment on their own employers, university students were deemed to be a suitable sample set. The sector tends to have a clear preference for employing younger workers (Curtis & Lucas, 2001; Economic Insight, 2019) and students have for many years featured significantly in UK hotel employment (Canny, 2002). Jobs in the sector are readily available to students (Lashley, 2013) and the specific nature of demand in the sector simultaneously allows students to shape their work requirements around that of their studies, while offering employers a readily available, relatively skilled and flexible supply of labour (Curtis & Lucas, 2001).

All students were enrolled in either a tourism or hospitality course and had either experienced work as a placement student and/or were currently employed, or had worked in hotels on a zero-hour contract. Twenty students were interviewed, with six having had experience of work in more than one hotel, and therefore providing an employment account of twenty-six workplaces. The vast majority, eighteen in total, were employees on zero-hour contracts and are reflective of a sector that at 20%

records the second highest usage of such contracts of any UK sector (Pyper & McGuinness, 2018). The remaining eight work experiences were carried out by students on a full-time basis while on a year's placement. The UK hotels in which they had been or were employed ranged from mainly three- or four-star UK inner-city chain hotels, with a small number also having worked in privately owned hotels.

All hotels have been anonymised and coded as follows:

- Hotel Blue — three-star UK chain hotel
- Hotel Green — three-star international chain hotel
- Hotel Red — four-star UK chain hotel
- Hotel Orange — four-star international chain hotel

Semi-structured interviews were conducted with questions exploring both the context in which decisions over scheduling were made and an understanding of the input of both employers and employees in the decision-making process. Opening questions were informed by the drivers shaping working hours identified by the literature and discussed above. This approach allowed for rich data to emerge by encouraging respondents to elaborate on their answers and where applicable provide detailed examples (Denzin & Lincoln, 2000). Data were analysed thematically. As all data collection was carried out by one person and a relatively small number of participants was involved, data familiarisation, coding and generation of themes was undertaken without the assistance of computer software.

Findings and discussion

Predicting demand, shaping hours and maximising employee use: the employers' perspective

In each of the hotels, management adopts several strategies to simultaneously maximise revenue and minimise labour costs. Central to this is the ability to be able to predict demand with relative accuracy. Such demand forecasting is pivotal both to successful hotel decisions around pricing and operations (Wu et al., 2017) and, combined with employee scheduling practices, key to maximising employees' productivity (Park et al., 2016). Each hotel follows a relatively similar model of forecasting, with historical patterns regarded as the base line point from which to start predicting demand. This is supplemented by significant additional information, gathered either informally or via a sales team. Three of the hotels subscribe to a local hotel database which supplies daily (anonymised) occupancy figures for other benchmarked hotels in the city, thereby allowing for a greater understanding of daily fluctuations. This is supplemented by local knowledge, obtained in the case of both four-star hotels through a specialist sales team, or as in the case of the three-star hotels informally gathered, for example, by checking the events listing of local venues — e.g. the sports arena and local rugby league fixtures, etc.

The most significant variant in understanding consumption patterns in all hotels is understanding the nature of the guest and the specific patterns of demand this triggers. Due to their city location, all four hotels have an identical complement of customers. From Monday to Friday, the majority customer type is corporate. Their demand patterns tend to be more predictable, buying into packages that include meals and drinking less, but maybe keeping the hotel bar open for longer in the evenings. However, from Friday to Sunday, the main guest type is the leisure customer whose patterns of consumption fluctuate more. They are less likely to eat in the restaurant but drink more and at earlier times in the hotel bar before going out. The combination of such understanding enables each hotel to manage its costs more effectively. According to Hotel Blue,

> *we know exactly who's coming, exactly what market they're coming from, how many corporates, flexible bookings, direct bookings, leisure bookings. Your corporate guests, their packages (package deals), are so indicative of how they will behave. If they get B&B and dinner is being paid by the company, then you know these guys will be with us for dinner. This type of business model is so much more predictable and therefore cost effective. The predictability is that good* (General manager, Hotel Blue).

Where consumption patterns are less predictable, hotels tend to respond to this by managing consumer demand (Guerrier & Lockwood, 1989). Hotel Blue, for example, offers meal discounts via the online booking system. These discounts are only available prior to arrival, with three emails sent if the initial take-up fails. This not only adds revenue, but simultaneously allows for greater efficiencies in scheduling employees.

The combination of forecast modelling and demand management therefore allows each hotel to match staffing requirements with a relative degree of accuracy. Consequently, all four hotels reported a degree of accuracy in anticipating demand and with relatively consistent labour costs throughout the year. Seasonal fluctuations, however, clearly do exist, with demand peaking just before Christmas and dipping in January. This was managed by the greater use of zero-hour staff in the case of the former and encouraging full- and part-time staff to take annual leave during the latter period. In addition, Hotel Orange's employee contracts contain a clause stipulating that staff should take the bulk of their leave during the first quarter of the year.

In addition, labour costs are controlled by adopting a flexible approach to labour usage. Each of the hotels relies on a mixture of full-time, part-time and in all but one case, casual (zero-hour) staff, with varying degrees of multiskilling and, in two of the cases, outsourcing of housekeeping. Such a strategy allows the employer to lower the fixed costs associated with employment (Lambert et al., 2012) as well as create the potential to restructure the wage effort relationship by increasing the rate at which workers are productive (Rubery et al., 2005). Several different factors, such as the specific pattern of demand, the degree of customer interaction and the level of skills required, can impose limits on the employers' ability to achieve such savings. For example, in HR and sales departments, skills are relatively complex and scheduling hours is not dependant on the presence of the customer, therefore employees here tend to be full-time, and hours are rigid, working 9-to-5, Monday to Friday. In contrast, the requirement for housekeeping staff, whose skill needs are relatively basic and routine, and whose demand is not reliant on the physical presence of the customer, will vary according to daily room occupancy rates. Hotels Red and Green outsource their housekeeping operations to make efficiency gains. This allows them to exactly match demand to supply as labour costs are *only* incurred for actual rooms cleaned. Such precision staffing, however, is clearly not feasible where operations, such as reception and F&B are open all day. As Hotel Red's manager states, "*there's a service level we have to maintain. Even in a dead hotel, even if we only sold 50* [as opposed to 260] *rooms, there's a minimum* [of employees] *we have to have*".

The ability for efficiency savings here is more complex and productivity gains may be limited by the degree of service on offer (Park et al., 2016). For example, Hotel Orange provides a full restaurant service and a bar, open to the public, which serves cocktails. Numerical flexibility still occurs, with full-time staff supplemented by employees on zero-hour contracts, but the direction in which multiskilling takes place tends to be into other hotel departments rather than the other way round.

Different types of just-in-time (JIT) practices were also commonly reported by managers. These practices, common to the hotel sector (Cauthen, 2011), allow management to react more effectively to variable consumer demand by making last minute changes to working hours (Lai & Baum, 2005). For example, in Hotels Red, Orange and Blue, employee rotas are issued just two to five days before the start of the working week. The more standardised operations of Hotel Green allow for rotas that are issued two weeks in advance. In addition, staff may either be phoned on a scheduled day not to come in or be sent home early and therefore not paid for their allotted shift. Management are also widely used in each of the hotels to step in and respond to sudden surges in demand. Each of the managers interviewed recorded significantly more hours than those reported by students.

Furthermore, tight budgetary control is asserted by senior management over line managers by close monitoring of the weekly payroll system. Most hotels hold several payroll meetings a week, adjusting staffing based both on predicted and past demand. For example, the F&B manager in Hotel Blue was instructed to claw back an overspend of £130 from the previous Saturday at the Monday meeting by sending staff home early that day. Daily adjustments are also made depending on sudden spikes or troughs in consumer demand. Employees are either phoned on the day or the day before to come in for extra shifts or in many cases stay later than anticipated. In most hotels, there was also an expectation that managers would fill in at the last minute with time off in lieu offered. Hours can also be suddenly cut if demand on a particular day is lower than anticipated and staff in most hotels may be sent home early. The F&B manager of Hotel Red also reported being instructed, without explanation, to suddenly cut her employees' hours.

The practices described above clearly benefit employers and enable them to adjust the use of staff in response to variable demand. However, as research indicates, and is confirmed by employees' responses below, the impact on staff is far less favourable, wreaking havoc on their lives (Cauthen, 2011; Lambert et al., 2012).

Working hours: the employees' perspective

Despite the prominence of long hours in much of the literature, there is very little evidence of this in the research. Placement students generally recorded a maximum of 40 hours, with those on zero-hour contracts reporting between 8 and 35 hours. The most extreme example, interestingly, came from the latter group where one student, employed in a city centre chain hotel, reported regular 60 to 70-hour weeks that would include late evening and early morning finish/start times, often working seven days, including one prolonged period of 32 days, without a day off.

Similarly, once scheduled, hours did not change substantially. Predictability in shift patterns, however, was a major problem and appeared linked to different patterns of availability. As research on low wage work in the US has indicated, the ability to partially restrict availability, as was the case with students who combined work with university, affords those workers an element of control over both work and non-work lives (Henley & Lambert, 2005; Lambert et al., 2014). However, claiming open availability, as was the case with placements students, restricts such control by the employee. A very limited degree of control was afforded by the ability to submit rota request forms, but their use was almost entirely restricted to requests for days off or holidays. The late notice of shift patterns compounded this lack of control. Although a small number received their rotas about a week in advance, the more common experience was between two or three days before the start of the working week, with several claiming that they were given as little as one day's notice. In addition, mechanisms to communicate shift patterns exacerbated the problem. Though many reported receiving texts or communication via Facebook, some reported needing to physically be at work as rotas were only posted on noticeboards.

Accordingly, feelings of powerlessness, with severe constraints on work-life balance, were common grievances among the respondents. In addition, many complained about the hard, physical nature of the work, with little chance to sit down during a shift, recording recurring fatigue as well as hunger and weight loss. Rather than challenging such conditions though, a more common response was resignation — "*we generally just accepted whatever we got*" was a typical response. Uncertainty in finishing times was a common experience, with many reporting a case of "*staying until you're all done*". Shift times might be scheduled to until about 23:00, but could easily stretch into the early hours of the morning. The impact of such uncertainty was compounded for a small number who were regularly scheduled to work an early shift the following morning. This could mean finishing as late as midnight, or even later, and being required to start the morning shift again at 07:00.

All these factors had a significant, detrimental effect, with the following comments commonly expressed, particularly by those employees on student placements.

> *It was terrible, by the time I'd get back home and by the time I'd wind down and get to sleep I'd probably get maximum three to four hours. I was always tired; I couldn't remember not being tired. It's quite a straining shift, you're always on your feet, there's a lot of pressure, the safe, the money. You have a lot of responsibility. There were times due to tiredness that I didn't do much outside of work...didn't see my family. I'd be sleeping, they were up* (Female placement student on reception in low-cost chain hotel).

> *I hated it. I literally had to take a day off if I wanted a haircut. That's how bad it was as you couldn't plan anything. Like friends would say, "do you want to do such and such next week?" and I'd like, "well I'm going to have to wait until I get my rota". You haven't got a structure, can't plan anything.* (Female placement student working across departments in inner-city hotel).

A very significant problem highlighted was the inaccuracies in the recording of hours worked. Just over half interviewed reported regularly recording the hours they had worked against those recorded by the hotel, with many being advised to do so by existing colleagues who had worked there for longer.

Systems to record hours, such as management recording hours or clocking-in often failed to work and, as noted below, pay based on rotas failed to accurately indicate the hours worked. Where there was a discrepancy, most people recorded taking this issue to management to have their pay amended.

A small number of employees also recorded working arrangements that were fundamentally unsafe. This was most likely for those working in the reception of low-cost hotels where they could be one of a few if not the only employee scheduled to be on duty in the entire hotel. In most cases, the hotel provided a panic button in the reception area, but this seemed entirely inadequate as it did not guarantee an immediate response with the call being referred to the police. One female employee, who worked in an "aparthotel", highlighted the dangers that this could pose. She would regularly be scheduled to work a 12-hour shift on her own at night, and only at the weekends did the hotel employ an extra person for security. This meant that not only were breaks impossible as there was no one around to replace her, but it also made the employee much more vulnerable to potentially dangerous encounters.

> *There were people getting rowdy or throwing food when they got in or trying to bring people in round the back. People having domestic fights. You could get anything, absolutely anything. It was quite dangerous, but you had a door you could lock. You could lock the main door to keep them out…There was also a prostitute working in the hotel who would bring clients in. The guys [who were brought in by the prostitute] were pretty rough, but they didn't make eye contact. They didn't really speak to you…I just chose to ignore that as I obviously wasn't going to acknowledge that on my own…* (Female placement student working in reception).

The absence of regulation

Most employees had little awareness of their entitlements under the WTR. Only one claimed to have been informed about their rights by their employer via a training session. Most knowledge tended to be gained informally, for example, via colleagues or in one case through concerned comments by customers. The most common infringement of the WTR was around the issue of breaks and pay deduction for breaks. Legislation requires employers to provide a structured 20-minute break after six continuous hours of work; however, only three of the workplaces reported on provided regular and structured breaks. Overwhelmingly employees recorded very little formality around the structuring of breaks, with a management attitude of "*catch it when you can*" prevailing. Indeed, for many, the lack of ability to take breaks appeared to be structured into management deployment strategies. Insufficient staff on duty to cope with continuing customer demand was the most cited reason. The case of reception highlighted above further indicates that for low-cost hotels, breaching the WTR is structured into employees' work schedules. Here, any respite from work meant "*sneaking a break*" in a back room while remaining vigilant for any guests arriving at the reception desk. Such non-compliance is common across the sector. A report commissioned by the UK government into employee relations in the hospitality sector indicates that not respecting legally entitled breaks appears to be "usual practice" (López-Andreu et al., 2019, p. 32).

The lack of breaks, however, does not seem to have deterred many employers from making wage deductions. Most employees reported that an automatic reduction of 20 or 30 minutes was made for each six-hour period of continuous work, regardless of whether they had taken the breaks. A small but significant number claimed that not being awarded a break and yet having pay deducted was a regular occurrence. Ironically therefore, not only did their employer breach the WTR, but significant cost savings will have been made. The underpayment of staff is one of the features regularly reported on by the UK government, with the hospitality sector often topping the list of named and shamed employers (see, for example, Department for Business, Energy and Industrial Strategy, 2018).

Interestingly, there was some recognition among the managers interviewed of the difficulty of granting breaks. The general manager at Hotel Blue acknowledged that taking breaks in the food and beverage department was particularly challenging during busy times and with staff deployed across the bar and restaurant areas.

Employee voice

All hotels involved in the research reported varying levels of both formal and informal employee voice mechanisms. The former included consultative forums, team meetings, anonymised phone lines or online forums, and the latter involved discussions between employees and their immediate supervisors. In theory at least, the existence of consultative forums, present in Hotels Red and Orange, might provide the most effective platform as involvement by employees was collective and based on representation from different departments. In addition, management attendance was either not stipulated or, as in the case of Hotel Red, in the guise of "guest" participation. However, the content reported by managers focused almost exclusively on operational issues, for example, concern over a shortage of cutlery, or staff facilities, such as the availability of lockers. Indeed, no manager interviewed was able to recollect *any* formal employee voice mechanism ever used to raise issues around working hours. Given the centrality of working hours to employees' experience of work, this might be surprising. In a rare study on employee resistance in the sector, around a quarter of surveyed employees reported disagreement with their employer around work scheduling (Lundberg, 1994). However, the failure to use formal systems to record such concerns appears far from unique. Evidence suggests not only that their focus is often almost exclusively on the business perspective (Wilkinson et al., 2004; Butler, 2005), but that any intention to provide effective voice to employees, particularly in a non-union setting (Gollan & Xu, 2014; McCloskey & McDonnell, 2018), often fails to match reality (Upchurch et al., 2006).

Although there was some awareness among employees of the existence of some of the formal mechanisms noted above, any meaningful consultation around working hours, even at an informal level, appeared almost entirely absent. As is reflected in several studies (Golden et al., 2011), control over schedules appeared dependent on contractual status. Placement students, for example, appeared to have the least say over their schedules as those on zero-hour contracts were at least able to seek agreement with their line managers to allocate hours that would allow them to work around any university commitments. Overwhelmingly though, most felt inhibited to raise concerns about any aspect of their hours. Indeed, the very use of an informal mechanism was almost invariably perceived as exacerbating rather than solving problems around working

hours. For many, complaining about their hours was regarded as "*stepping over the line*", risking either the insecure contracts they were on, their financial commitments and/or the need for future references. Keeping quiet and acquiescing to poor practice were typical reactions.

> *No, I don't really want to [complain]. I just want to get on with it. I just don't want to annoy them. I don't think I'll get sacked, but I just don't want to be in their bad books. I want to be a good employee (Female zero-hour employee in three-star inner-city chain hotel).*

> *It's a year. They're going to write a report about me, and I want the experience. This is the industry; I've got to grin and bear it. It's a year, just do it, get it done (Female reception employee on year placement in low-cost chain hotel).*

Fear of raising issues is of course not unusual among employees and can be seen as "*risky and futile*" behaviour (Milliken et al., 2003, p. 1466), appearing more likely when employees perceive that the benefits of speaking up are greater than the cost of doing so (Milliken et al., 2003; Detert & Treviño, 2010). The precarious nature therefore of much of hotel employment is likely to exacerbate this.

A compounding factor for some was that by raising an issue, this could in turn create negative consequences for colleagues, affecting both the camaraderie, well-being and loyalty in the team and, consequently, the work environment for the individual. As indicated elsewhere, allowing one employee to have more control over work schedules, for example, can intensify restrictions for others (Lambert et al., 2012). Camaraderie among colleagues, however, could also be used positively. For example, by warning and sharing awareness of poor management practices with newer team members, such as the lack of reliability in recording hours, discussion around the unfairness of no breaks or the unpredictable shift patterns. Sharing the need to record hours clearly benefited employees; however, only rarely were such collective "gripes" used to confront management.

For several reasons, raising any concern, whether collectively or individually, seemed to be perceived as a fruitless exercise. The very supervisors with whom problems might be raised were often seen to be in the same predicament: working without breaks and with the same unpredictable shift patterns and, as a consequence of perceived staffing shortages, lacked the control to address staff concerns. Their response was typically "*we're all in the same boat*". Interviews with the F&B managers corroborated this; their working hours were often very long and the control they had over their staffing budgets was centrally determined.

The most common concerns reported by students revolved around the erratic and late scheduling of hours, the lack of breaks, and breaks untaken but with pay deducted. The reaction was either to internalise any problems for fear of retribution or to raise it individually with a supervisor. Breaks could be given as a result of this, but the change would never last beyond a shift. More typically, the response from supervisors would be "*what do you expect in this industry*". Only in rare cases was collective concern taken up with management. But even these were unlikely to lead to any change. For example, a student who had worked in a hotel for two years (both on a part-time basis and one year [placement] contract) reported that neither she nor her colleagues had ever been awarded a break, something that was regularly discussed among the shift team workers and brought to the attention of management.

> *It was raised in a jokey fashion with supervisors like 'well we haven't had any breaks again this week', and they'd say 'yes I know, I know' but nothing happened* (Female employee in the restaurant of an independently owned hotel).

Not providing breaks and then deducting that time from employees' pay is something that can only be resolved by employers rather than more junior managers. However, there were clearly problems raised by employees that could potentially be resolved by greater involvement of employees in scheduling practices. For example, the practice of announcing rotas at the last minute and then subjecting these to constant change, without consultation, was something that — as a student on a year's placement in reception noted — *could* have been planned more effectively by involving team shift workers.

We could have all sat down as a reception team and said "I wouldn't mind working so and so" as we all worked different shifts. But this never happened. The rota appeared on the wall and that was it (Female reception employee on year placement in low-cost chain hotel).

Allowing for meaningful employee involvement in scheduling working hours also has the advantage of benefitting not only the workforce but employers as well. A study on employee engagement in Turkish hotels demonstrates that where employee voice is encouraged and workers are more engaged in their work, higher levels of job satisfaction are reported, with workers less likely to leave and record less work-life conflict (Burke et al., 2013).

Conclusion

The assertion that the terrain of working hours is one that is heavily contested is clearly in evidence in this study. However, the manifestation of this for employers and employees appears to differ. For employers, the struggle to precisely match employee hours with the fluctuating demands of consumers is open and visible and manifests itself in the tight control over labour costs, the just-in-time scheduling of employees and the use of varying levels of contracts. Hotels in the study structure and schedule hours in a such a manner that it ensures optimum labour productivity. It is apparent that a considerable degree of management time and scrutiny both at line manager but particularly at senior level is devoted to making sure that hours and therefore labour costs closely match the varying customer demand patterns.

It is also apparent therefore that the nature of employee relations in relation to the determination of working hours exposes employees to a system that fits within the employer-led model of organising working hours, espoused by Rubery et al. (2005). The absence of union intervention and an almost complete disregard for legal protection in many of the workplaces results in control that is almost absolute for employers.

For employees, any conflict around working hours is structured into both the contractual and day-to-day employment relationship with management. The contested terrain of working arrangements asserted by several authors (Blyton, 2011; Rubery et al., 2005) expresses itself in ways that are both visible but

also largely hidden. Formal channels that could provide a visible focus for discontent around working hours are in evidence, but the focus seems almost uniquely operational, and employees have little awareness of their existence.

Visible aspects are expressed through an almost total lack of control in shaping individual working patterns, breaks not given but still deducted from pay, combined with for some, risks to health and safety. The ability to exert control and the resistance to these patterns is, however, much more likely to be hidden and out of view. To challenge management is seen as jeopardising employment prospects, alienating colleagues and/or is met with a resigned acceptance that this is just what hotel work involves, and makes raising concerns either formally or informally seem futile or not worth the risk. Only rarely does this conflict express itself openly and when it does, it is almost exclusively individualised. The approach is informal via requests to line managers for a more reasonable approach around the organisation of rotas or to simply be allowed a break that is a legal entitlement during a long and exhausting shift. Where the requests are met with change, this often is limited and short-lived. The findings suggest some limited evidence of collectivising issues, but this tends to be restricted to information sharing or warning colleagues of poor management practices to watch out for.

And yet there are signs that an alternative approach is possible and it is one that is not difficult for management to adopt. The view expressed, for example, that work colleagues could be collectively involved in deciding how rotas are distributed could enable a process that is fairer and more transparent and based less on management prerogative. However, the absence of strong and active trade union intervention that interacts with and monitors a strong legislative framework is perhaps likely to leave UK hotel workers largely powerless in their ability to effectively challenge and therefore exert meaningful and lasting control over their work schedules.

Further research could more specifically focus on whether labour management practices adopted by low-cost hotels almost implicitly lead to breaching legal guidelines around working hours and therefore make it impossible for employees to challenge the lack of structured breaks or the hazardous working environment. Understanding whether female employees are more exposed to potentially serious risks needs highlighting. There is also a dearth of literature more generally on the reality or lack of employee voice in the hotel sector. More research is clearly needed on how and indeed whether hotels, particularly in in the absence of trade union intervention, can facilitate more effectively the use of formal and informal channels to give their employees a voice.

As Baum and Hai (2019) assert, it is important to call out the type of unethical labour practices cited in this study, particularly when, as their evidence suggests, they form part of the norm of tourism and hospitality work. Without a voice in how work schedules are constructed or where legal safeguards are simply ignored and breaks not given but pay deducted, the findings reported here expose a reality around working hours that is exclusively employer-centred and based on cost savings, depriving workers of their pay entitlements and any semblance of a work-life balance.

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Support for local wines in The Netherlands: opportunities for the hospitality industry

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ABSTRACT: This article reports on a research project to measure the current intrinsic competitive value of Dutch wine in comparison to wines from renowned wine countries based on a taste and olfactory evaluation, and to explore the sustainable benefits that local Dutch wine can offer and wines made from fungus-resistant grape varieties (FRG). Both factors aim to measure the unique selling point of Dutch wine and explore if adoption in The Netherlands can be strengthened in the future. A blind tasting experiment with four different tasting groups ($n = 54$) was conducted. Participants evaluated (blind) two Dutch wines (white and red), a New Zealand wine (white) and a Bordeaux blend (red), which were matched according to their flavour components and popularity in The Netherlands. The outcome of this research shows no significant difference in overall scores between groups when comparing Dutch wine to wines from renowned wine-producing countries when tasted blind. However, the Dutch white wine was significantly more likely to be purchased according to participants. Results show that the competitiveness of Dutch wine in comparison to other renowned wine regions is evident. Dutch wine has increased in quality over the last years, therefore it is more likely to be purchased now. This offers opportunities in marketing and sales to increase efforts towards a more sustainable food and beverage programme among restaurateurs in The Netherlands.

KEYWORDS: Dutch wine, food and beverage management, fungus-resistant grape varieties, local food consumption, sustainable cuisine, sustainable management practices

Introduction

Acceptance of local Dutch wine has been poor among wine consumers in The Netherlands. Consumers used to be sceptical about The Netherlands being a wine growing region (Rhee, 2019; Vis et al., 2015). This scepticism was based on a poor experience with earlier vintages, which were of inferior quality (Rhee, 2019; Vis et al., 2015). Previously it was unimaginable that Dutch wine could be of distinct quality when compared with more well-known wine regions, such as Bordeaux in France, or cool climate regions such as the Moselle in Germany. Dutch wines were often defective and the first fungus-resistant grape (FRG) varieties carried an undesirable "foxy" flavour (Pedneault & Provost, 2016). Scepticism and prejudice towards FRG varieties have led to low acceptance and adoption among restaurants (Beukers & Vette, 2015; Pedneault & Provost, 2016; Sloan et al., 2010) in support of Dutch wine in The Netherlands and thus the wine consumer.

A shift is taking place where wine regions in the world are expanding towards more northern areas, due in part to a change in climatic conditions. Well-known examples of successful cool climate wine regions are Ontario and Quebec in Canada, and Sweden, England and The Netherlands (Jones, 2019; McCoy, 2019; Oude Voshaar, 2015; Shaw, 2017). FRG varieties are now widely planted in The Netherlands. Assumptions are made that FRG varieties are of inferior quality, even though research does not support this perception (Beukers & Vette, 2015; Borrello et al., 2021, Sloan et al., 2010). The Netherlands is producing high quality wines made from FRG, which is unique in the world of wine (Beukers & Vette, 2015), and they are also more sustainable due to the fact that fewer pesticides are necessary for their production (Oude Voshaar, 2015).

There are numerous reasons which account for the current quality of Dutch wine. The quality is increasing due to an increase in expertise among wine producers, active collaboration, maturing grape vines (Vis et al., 2015) and increasingly higher temperatures (Jones & Schultz, 2016). Clearly, these developments will improve the future quality of Dutch wines. This will strengthen a more positive perception towards Dutch wine among wine consumers, giving a higher likelihood to purchase in the future. Beverages produced nearby have the potential to play an important role in sustainability, thus adding another dimension towards a more sustainable food and beverage programme. For a number of reasons, including gastronomic and ecological, restaurants are trying to use more local products (Schulp et al., 2010). Striving for the use of local products in restaurants should be not limited to food alone. Although the number of Dutch vineyards has been on the increase since 1950, the marketing of Dutch wines, and

certainly sales of these wines in restaurants, is relatively slow. In part, this is blamed on prejudices (Chefsfriends, 2016), ranging from unsuitable climate to the use of new, fungus-resistant grape varieties (FRG), to the price. These prejudices have mainly been evident in newspapers and other media (*NOS*, 2016), not in academic literature. Academic research is scarce on cool climate wines and how they are being perceived in tastings. However, more cool climate areas in the world are having increased success, such as Ontario (Shaw, 2017) and England (McCoy, 2019).

Literature review

The growing quality of Dutch wines

The quality of Dutch wines has increased considerably. The panel for the examination of Dutch wines of the low countries received a record number of wines in 2020, with of fourteen gold medals (Wijnkeuring van de lage landen, 2020). There are numerous factors which are important in this overall growth. Global warming is the biggest contributor, resulting in better temperatures for grapes to ripen in The Netherlands (Jones & Schultz, 2016). Global warming is also bringing challenges for other wine regions in the world. The Rhône valley is experiencing extreme temperatures which result in considerably higher alcohol percentages during fermentation. It also decreases acidity in wines, which makes the wines likely to be more off balance. The Burgundy region is also experiencing more heat, and this warming effect leads to earlier picking of the grapes. This produces future challenges, offsetting Burgundy's uniqueness which used to be considered a cool climate area, and historically resulting in elegant pinot noirs and chardonnays (Gavrilescu et al., 2018).

Global warming also brings opportunities for cooler climate wines further north which used to be considered non-wine producing regions. For example, southern England which used to be a marginal wine region now produces high-quality sparkling chardonnay-based wines (McCoy, 2019). At the most extreme, viticulture is even possible in Sweden, where growers are now working together actively to produce quality wines (Jones & Schultz, 2016). Winemaking in The Netherlands is still young and in its development stage (Beukers & Vette, 2015) when compared to regions such as Bordeaux in France where there is have a long history of winemaking. Emphasis lies on white grape varieties which are better able to prosper and have a higher quality in cool climates. However, the share of red grape varieties is also increasing (Vis et al., 2015). The Dutch wine author Harold Hamersma is also seeing a positive transformation in the current level of quality. However, in the past, he described Dutch wine as "impure, unrefined, rough, smelly, rubbery" (Vis et al., 2015, p. 7). Wine professionals are also more actively supporting Dutch wine. Former sommelier and wine critic Edwin Raben acknowledges the high quality that Dutch wine can have. De Kleine Schorre (Pinot Gris) was greatly appreciated by Edwin Raben (Beukers & Vette, 2015). Thus, the transformation in the quality of Dutch wine is growing rapidly and it is also being acknowledged among wine professionals. Expert quality ratings are of importance to cool climate regions since these wines are largely unknown (Dressler & Kost, 2014; Schroeter et al. 2011). Undoubtedly, for The Netherlands, an increase in expert recognition is a good development for future adoption among restaurateurs and thus wine consumers.

Trends and the future for Dutch wine

In parallel with the development of local wines, microbreweries have grown rapidly and the reason for this growth is that consumers are looking more seriously towards local products (Alonso & Sakellarois, 2017). The beer market has changed dramatically over recent years in The Netherlands. Consumers are switching from mass market lager, which has seen rapid evolution since industrialisation in the twentieth century, to local craft beer. Small independent breweries are able to prosper alongside the big breweries who used to be the first choice. In the beer market, consumers are looking for "small, independent and traditional...brewers" (Elzinga et al., 2015, p. 243). Small, independent, Dutch wineries are also gaining more interest as quality is growing, and this might follow the trend of microbreweries and more local food consumption (Alonso & Sakellarois, 2017).

Cool climate regions are expanding and wine cooperatives are increasingly buying land in cool climate regions, showing the growth potential in the future (Jones & Schultz, 2016). Global warming is likely to increase in the future which is a threat to warmer regions such as the Rhône valley. Nonetheless, it creates opportunities for new plantings in areas at higher latitudes which previously were believed to be too cold to produce wines competitively and profitably (Anderson, 2017). Because of increasing temperatures, yields are also growing. Research in the Mosel area of Germany shows that an increase in temperature of 1 °C improves the overall yield of Riesling by 30% (Anderson, 2017). In this case, climate change will have a positive effect on the future of Dutch wines, making them easier to grow. Globally, viticulture in cool climate regions is increasing. The most extreme examples can be found in areas such as Quebec (Canada), which has grown from five wineries in 1985 to 71 wineries in 2017 (Jones, 2019). The vineyard area in the United Kingdom grew by 148% in the period 2004 to 2013 (Nesbitt et al., 2016), showing high growth in cool climate areas throughout the world.

Acceptance of FRG varieties

Grape varieties are a significant factor for wine consumers when choosing a wine (Stanco et al., 2020). FRG varieties are the most widely planted in The Netherlands. However, they are unknown among most wine consumers (Borrello et al., 2021), which makes adoption challenging. FRG varieties can have similair taste profiles when compared with *Vitis vinifera* grape varieties such as Carbenet Sauvignon and Pinot Gris. An example is Regent, which is a popular red FRG variety with 1 917 hectares planted in Germany, but it is also widely planted in The Netherlands. Regent can have a similar taste profile when compared with a Merlot from Bordeaux (Pierik, 2018). Other studies show the same results with the quality of FRG wines being similar to *Vitis vinifera* wines (Pedneault & Provost, 2016; Sloan et al., 2010). Research by Van Der Meer and Lévite (2010, p. 150) shows that "...70–90% of consumers noted Solaris [an FRG grape]...equivalent to *Vitis vinifera* Riesling".

In terms of marketing, wines from FRG varieties are challenging. The first FRG varieties used to carry an undesirable "foxy" flavour (Pedneault & Provost, 2016). FRG varieties with an attractive flavour profile have been developed rapidly over the last few decades (Borrello et al., 2021). However, marketing efforts towards adoption of FRG varieties have been lacking (Borrello et al., 2021). Retailers and restauranteurs find it

challenging to persuade wine consumers to try an unknown wine made from FRG grape varieties. Winemakers see it as a necessity to educate the consumer about the benefits of FRG grape varieties (Sloan et al., 2010). The market for wines made from FRG varieties has not been developed (Nesselhauf et al., 2017). Market share of wines made from FRG varieties needs to be increased to retailers and in the hospitality industry (Sloan et al., 2010).

There is a belief among consumers that FRG varieties still produce lower quality wines, since the first FRG wines received bad press. This was the result of wine professionals who considered FRG varieties as inferior compared to *Vitis vinifera* grape varieties (Beukers & Vette, 2015; Sloan et al., 2010). In Germany, between 2010 and 2015, new plantings of FRG grapes increased by 40% (Pedneault & Provost, 2016). These types of grape varieties are relatively young and are still relatively unknown among consumers (Nesselhauf et al., 2017). As a result, this creates challenges in their adoption and acceptance among consumers.

The growing importance of local produce in hospitality

The importance of using local produce in the hospitality industry is growing. The hospitality industry is one of the most polluting industries. "The United Nations World Tourism Organization estimates that tourism accounts for approximately 5 per cent of global CO_2 emissions in the world, and this amount is projected to increase by 130 per cent in 2035" (Aragon-Correa et al., 2015, p. 499). Therefore, sustainability is one of the major challenges that the hospitality industry must face (Cavagnaro & Curiel, 2012).

Authentic local gastronomic experiences are increasingly being demanded by consumers (Goolaup & Mossberg, 2017). Consumers are also more interested and more willing to pay more for local products (Johnston et al., 2018), and this also provides opportunities for Dutch wines. Economic value can be gained, because local produce is increasing as a unique selling point for restaurateurs. Consumers show an increased support for restaurants that increase their marketing efforts and offerings in more sustainable consumption (Chou et al., 2020). In terms of wine, consumers are more willing to pay more for wine with characteristics of sustainable production (Schäufele & Hamm, 2017). Research by Mihailescu et al. (2021) shows that wine consumers are more willing to purchase wines with eco-certified and sustainable benefits. Wine consumers nowadays are also more willing to consume sustainable and local wine (Palmieri & Perito, 2020), and this strengthens the position of Dutch wine in the current wine market.

In environmental value, there are numerous positive aspects of incorporating Dutch wine in the hospitality industry. Dutch wine is often made from FRG varieties, which need almost no pesticides. FRG grapes are grapes which have been crossbred with *Vitis vinifera* and North American varieties such as *Vitis labrusco*, so these grapes are less sensitive to powdery mildew and grey rot. On average, in the Bordeaux region, grapes are sprayed 15 to 20 times, in The Netherlands this is only 1 to 2 times (Oude Voshaar, 2015). In The Netherlands, it is prohibited to spray copper sulphite, which is harmful for the consumer and the environment. Recently, winemakers have become aware of the need to lessen the number and amount of pesticides used in the vineyard due to harm to the soil and people close to the vineyards (Teissedre, 2020). Again, this strengthens the sustainable side for actively supporting the incorporation of Dutch wines by restaurateurs.

Travelling to the end consumer in terms of bottle mileage is deemed to have the greatest impact on the environment (Point et al., 2012). Food miles are an important aspect in sustainable food and beverage practices (Schulp et al., 2010). A significant amount of overall greenhouse gas emissions in the wine cycle comes from transportation — in total up to 30% (Weiser et al., 2010). Often wines must travel considerable distances before reaching a restaurant. Local wines can decrease the ecological footprint, therefore they have a lot to offer in sustainability.

When it comes to social factors, local produce procurement forges connections with local farmers. Wine producers can sell their wines for better profit margins by joining cooperatives. The COVID-19 pandemic also increasingly stresses the point that the world is reaching its limits when it comes to relying on food items from overseas, and the pandemic has exposed the fragility of the global supply chain, which has stimulated deglobalisation thinking (Klomp & Oosterwaal, 2021). Outsourcing labour to lower wage countries, while subsequently importing food and other products back into our country (Aernoudt, 2020) is an outdated and polluting business model. The Netherlands produces around 1.2 million bottles a year (*NOS*, 2019) which can be distributed accordingly by collaboration between farmers and restaurateurs. Consumers want to be more connected to local communities and places (Klomp & Oosterwaal, 2021), which supports effective distribution in the supply chain. Most wineries in The Netherlands are small and for farmers it is challenging to gain enough revenue from producing wine. By active collaboration, farmers can obtain better profit margins for their wines, which will contribute to the social well-being of the community. From an organisational perspective, Dutch wine adds to all levels of sustainable development, thus adding considerable value for restaurateurs and wine producers, while also adding to the social, economic and environmental prosperity and sustainability of a region and its inhabitants (Cavagnaro & Curiel, 2012; Figueiredo & Franco, 2018; Lashley, 2016). Sustainability is becoming of critical importance to consumers and therefore cannot be neglected. Dutch wine contributes and supports the sustainable local food trend and this creates a unique selling point.

Purpose

The purpose of this project is twofold. The most important is to gain insight into the quality of Dutch wine in comparison to wines from popular wine regions with similar flavour profiles. As a result, the competitiveness of Dutch wine can be measured in comparison to the wines from France and New Zealand used in this study. A secondary purpose is to explore, through a literature study, the unique sustainable benefits of Dutch wine. Both taste and positive sustainable factors will lead to increased adoption among restaurateurs and wine consumers. This will have positive implications for the future prosperity of The Netherlands as a wine-growing region (Figure 1).

This study investigated how Dutch wines are experienced in a blind tasting to measure the intrinsic value that Dutch wine can offer. An experimental design without an intervention in a fully controlled setting was used to measure how the Dutch wines were being perceived among wine consumers. Currently, there is a gap in academic research about the intrinsic quality

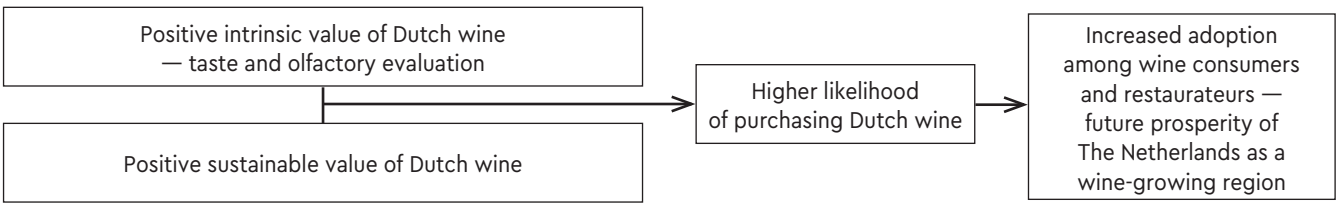

FIGURE 1: Conceptual model

that Dutch wine can offer in comparison to more well-known wines in a blind tasting setting. The aim is to fill this gap and explore if Dutch wines are competitive in comparison to more well-known wine regions. This gives restaurateurs more insight into the opportunities for actively adopting Dutch wines in their food and beverage portfolios. Educating the wine consumer will allow for wider adoption of local wines by restauranteurs. As a result, the trend towards local wine consumption will be enhanced further. Sustainability is important to consider when increasing the emphasis on local wine. The sustainable benefits of Dutch wine are not the core of this study, however, they are critical for the future adoption among restaurateurs and wine consumers. Also, the trend of incorporating local produce in the hospitality industry is becoming more evident. The sustainable benefits of Dutch wine will be answered based on the current literature. In this context, the following research questions were formulated:

RQ1: How do Dutch wines score based on their intrinsic value when compared with renowned wines, such as from Bordeaux and New Zealand, when tasted blind?

RQ2: How likely are Dutch wines to be purchased when compared to wines from Bordeaux and New Zealand when tasted blind?

RQ3: How does a Dutch red wine blend made from FRG grape varieties score in comparison to a red Bordeaux blend made from *Vitis vinifera* grape varieties when tasted blind?

RQ4: What value can Dutch wine add to a more sustainable food and beverage practice?

Method

Quantitative data was gathered by means of a tasting form which all participants received individually during blind tasting sessions. Participants were asked to fill out personal information like gender, age and consumption patterns. The second part of the tasting sheet focused on the characteristics of the wine, such as aroma, sweetness, acidity, tannin, weight and finish, which are crucial to get to an overall conclusion in deductive tasting (Jackson, 2017). The overall score, and likelihood to buy, were considered the most critical because this measures the wine consumer's acceptance of Dutch wine. A 5-point hedonic scale was used for every dimension. This type of scale is easy to use for everyone from beginner to advanced wine drinkers (Cicchetti, 2004; Jackson, 2017). Purposive sampling was used to look for relevant tasting groups and the experience-based distinctions of beginner and advanced wine drinkers has been used in previous studies (Parr et al., 2002). The aim of this method was to create a diverse sample, which more closely represents the wine consumer population in The Netherlands. Moreover, it might show significant differences among distinct groups based on wine tasting experience. In total, four blind tastings were held at a hotel management school in The Netherlands (Table 1). The order of the tasting groups ranged from beginners to advanced. The level of experience is based on the different tasting experience as determined by the Wijnacademie [wine academy] in The Netherlands. In order, from beginner to advanced: level 1 [SDEN1], level 2 [SDEN2] and level 3 [SDEN3] (Wijnacademie, 2021). Although there is a great diversity of wine tasting experience among the sample, it cannot be generalised to the entire population of The Netherlands.

Organisation of the tasting

The wines were chosen in the price category of €12 to €16. The wines in this study were selected prior to the tasting by using content analysis (Mastroberardino et al., 2019) and the wine app Vivino (https://www.vivino.com/NL/en/; Kotonya et al., 2018). The wines were further selected based on the flavour profile. Both the white wine pair and the red wine pair matched according to their aroma components. Also, the quality needs to match to compare how likely Dutch wine will be consumed. In the second stage, the wines were tasted by three wine professionals as a pretest. The tasters from the pretest are accredited at the highest level by the wine academy in The Netherlands (Wijnacademie, 2021). Results from this tasting were found to be satisfactory. The wines were then discussed with the wine professionals to analyse if the wines matched. They decided that the wines matched according to the flavour profile of the content analysis and the pretest (Table 2). Obviously, the flavour components of the wines cannot exactly match, which is the main limitation of this study.

The wines used during the blind tasting sessions consisted of three cool climate wines, two from The Netherlands and one from New Zealand. France is the most popular, old world, wine country among wine consumers in The Netherlands, while New Zealand is the second most popular from all the

TABLE 1: Distribution of the tasting groups ($N = 54$)

	Tasting group 1 (SDEN1)	Tasting group 2 (SDEN2–3)	Tasting group 3 (SDEN2–3)	Tasting group 4 (SDEN3)
Total	21	9	15	9
Age	18	23	21	23
Male	8	4	4	6
Female	13	5	11	3

TABLE 2: Wine characteristics, aroma and flavour profile — pretest and content analysis

Wine	Producer (vintage)	Primary aroma	Secondary aroma
1	Kleine Schorre, Schouwen-Druivenland Gris 2018)	"Orange, lemon, apple, peach, pear, tropical, minerals, honey, stone"	"Banana, yeast, cream, toast"
2	Vavasour, Pinot Gris (2018)	"Melon, apple, peach, pear, tropical, Minerals, honey, stone"	"Banana, yeast, cream, toast, butter"
3	Chateau Bolaire, Bordeaux Supérieur (2016)	"Black fruit, plum, blackberry, cassis"	"Oak, vanilla, tobacco"
4	Betuws Wijndomein, Linge Rood Cuvée Signature (2017)	"Black fruit, plum, blackberry, cassis, red cherries"	"Oak, vanilla, tobacco, smoke"

new world wine regions (Wijnbeurs, 2020). The wines were also selected based on their grape varieties. Both the Dutch and the New Zealand white wines are made from classic *Vitis vinifera* grape varieties, as well as the red Bordeaux blend. In contrast, the Dutch red wine is made from FRG grape varieties. Comparisons can therefore be made between both *Vitis vinifera* grape varieties and FRG grape varieties based on their intrinsic quality (Table 3).

The tasting room was prepared before all participants arrived. Four clean glasses were numbered in order and four tasting forms were put in the middle of the table. The room had up to 22 places with a table which had a white surface equipped with white light, four clean glasses, a sink and a cup with tap water. All conditions were equal in every tasting group. The room temperature was set at 20 °C. Up to one hour was given per tasting. The wine bottles were completely covered in aluminium foil. The white wines were served at 10 °C and the red wines at 16 °C. A wine refrigerator was present in the tasting room, ensuring the consistent temperatures of the wines.

No information about the wines was provided beforehand to ensure an unbiased outcome. The wines were poured in order by the researcher and assistant once all the participants were seated. Quantities per tasting sample were kept at around 35 millilitres. The wines were tasted and assessed, all in the same order. No minors were allowed to participate in this research.

Findings

The respondents in all four tasting groups assigned an overall higher score (on a 5-point Likert scale) for the Dutch wines than the white New Zealand Pinot Gris or the red Bordeaux blend. The Dutch white wine Kleine Schorre (wine 1) scored on average the highest overall score. Also, the Dutch red wine Betuws Wijndomein (wine 4) made from FRG grape varieties scored on average higher than the red Bordeaux blend (Chateau Bolaire — wine 3) made from *Vitis vinifera* grape varieties.

There were differences found between both wine pairs. The Dutch white wine Kleine Schorre scored significantly higher than the New Zealand white wine ($t(53) = 4.62$, $p < 0.001$). The Dutch red wine (Betuws Wijndomein) scored higher than the red Bordeaux (Chateau Bolaire) although the result was not statistically significant ($t(53) = 1.90$, $p = 0.063$) (Table 4).

Overall, the wines from The Netherlands were perceived positively by all tasting groups and even scored better than the wines from the classic wine regions. A one-way ANOVA (Kruskal–Wallis) test (Table 5) was used to explore if there were significant differences between the tasting groups based on their wine tasting experience and no significant difference was found between the overall scores of the wines among the tasting groups ($p > 0.05$). The results show that both beginner and experienced wine tasters were in agreement and scored all wines equally based on their overall quality.

The second dimension of the blind tasting experiment measures how likely the wines were to be bought based on the overall evaluation of the blind tasters. On average, all participants scored the Dutch wines the highest in likelihood to buy. The Dutch white wine Kleine Schorre was the most likely to be purchased among participants. A *t*-test was used to analyse if there were significant differences in terms of likelihood to buy among the wine tasting groups. Based on the *t*-test, the Dutch white wine scored significantly higher ($t(53) = 4.71$, $p < 0.001$) than the New Zealand white wine. The Dutch red wine was also significantly more likely to be bought based on the participants' evaluations ($t(53) = 2.24$, $p = 0.029$; Table 6).

TABLE 3: Blind tasting experiment — wine list

Wine	Producer (vintage)	Grape variety	Region and country
1	Kleine Schorre, Schouwen-Druivenland Gris (2018)	Pinot Gris and Auxerrois (classic grape varieties)	Zeeland, The Netherlands
2	Vavasour, Pinot Gris (2018)	Pinot Gris (classic grape variety)	Awatere Valley, New Zealand
3	Chateau Bolaire, Bordeaux Supérieur (2016)	Cabernet Sauvignon, Cabernet Franc, Merlot (classic grape varieties)	Bordeaux, France
4	Betuws Wijndomein, Linge Rood Cuvée Signature (2017)	Cabernet Cortis and Regent (FRG varieties)	Gelderland, The Netherlands

TABLE 4: Overall Student's *t*-test score of local wine vs foreign wine

Local wine	Foreign wine	*t*-value	degree of freedom	*p*-value
Wine 1 — Kleine Schorre (The Netherlands) overall score	Wine 2 — Vavasour (New Zealand) overall score	4.62	53.0	<0.001
Wine 4 — Betuws Wijndomein (The Netherlands) overall score	Wine 3 — Chateau Bolaire (France) overall score	1.90	53.0	0.063

TABLE 5: Overall scores for wines 1 to 4 — one-way ANOVA (Kruskal–Wallis) scores

Tasting group	Wine 1		Wine 2		Wine 3		Wine 4	
	Mean	Standard deviation	Mean	Standard deviation	Mean	Standard deviation	Mean	Standard deviation
Group 1 — (SDEN 1)	3.67	0.796	3.14	0.854	3.10	0.831	3.33	0.966
Group 2 — (SDEN 2–3)	3.22	0.441	3.00	0.707	3.00	0.866	2.89	1.360
Group 3 — (SDEN 2–3)	3.80	0.414	3.00	0.655	3.07	0.704	2.93	0.884
Group 4 — (SDEN 3)	3.22	0.667	2.44	0.527	2.44	1.01	3.56	0.527
Overall mean score	3.56	0.664	2.96	0.751	2.96	0.846	3.19	0.973
Wine	**χ^2**	**Degree of freedom**	***p*-value**	**ε^2**	**χ^2**	**Degree of freedom**	***p*-value**	**ε^2**
Wine 1 — Kleine Schorre (The Netherlands)	7.77	3	0.051	0.1467	7.77	3	0.051	0.1467
Wine 2 — Vavasour (New Zealand)	6.44	3	0.092	0.1216	6.44	3	0.092	0.1216
Wine 3 — Chateau Bolaire (France)	2.86	3	0.431	0.0540	2.86	3	0.431	0.0540
Wine 4 — Betuws Wijndomein (The Netherlands)	3.49	3	0.322	0.0659	3.49	3	0.322	0.0659

TABLE 6: Likelihood to buy local wine vs foreign wine — Student's *t*-test

Local wine	Foreign wine	*t*-value	Degree of freedom	*p*-value	Cohen's *d* effect size
Wine 1	Wine 2	4.71	53.0	<0.001	0.641
Wine 3	Wine 4	−2.24	53.0	0.029	0.305

Results from the one-way ANOVA (Kruskal–Wallis; Table 7) show that there was a significant difference found between the groups. The Dutch white wine was significantly more likely to be bought ($p = 0.034$) when comparing between groups.

Discussion

The competitiveness of Dutch wine in comparison to the wines from renowned countries in this study are evident. The quality of Dutch wine in combination with the sustainable benefits offer a unique selling point. In this light, marketing and sales efforts should be strengthened to support wider adoption of Dutch wines in The Netherlands. The quality of Dutch wine was already evident according to the wine inspection panel for Dutch wine in the low lands (Wijnkeuring van de lage landen, 2020), however, this was not in a blind tasting setting. Findings from this research show that Dutch wine in a blind tasting setting also has high intrinsic value, which is a new insight. The white wine Kleine Schorre, Schouwen-Druivenland Gris (2018) even scored significantly higher than Vavasour (2018) during the blind tastings. The quality of Dutch wine will grow even further, with increasing temperatures, better expertise among wine growers and the maturing of grape vines (Beukers & Vette, 2015). England and Norway are following a similar development (McCoy, 2019), which will lead to a transformation of quality wine regions moving more north in the hemisphere.

The Dutch white wine Kleine Schorre, Schouwen-Druivenland Gris was significantly more likely to be bought in comparison to the other wines. The beginner and intermediate groups in this study (groups one and three) were more likely to buy the Dutch white wine. This is in line with the research done by Hoekstra et al. (2015), which also shows that millennial wine drinkers have a higher preference for white than red wines. Results from this research also confirm the preference for white wine. However, there is another contributing factor which results in a higher preference for white wines and thus results in a higher likelihood to buy. White grape varieties are better able to prosper in cool climate vineyard areas (Shaw, 2017) and, in The Netherlands, the most complex wines are made from white grape varieties (Beukers & Vette, 2015). Therefore, white wines are, in some cases, of higher quality than red wines. Examples can also be

TABLE 7: Likelihood to buy wines 1 to 4 — one-way ANOVA (Kruskal–Wallis) scores

Tasting group	Wine 1		Wine 2		Wine 3		Wine 4	
	Mean	Standard deviation	Mean	Standard deviation	Mean	Standard deviation	Mean	Standard deviation
Group 1 — (SDEN 1)	3.67	1.24	2.86	1.2	2.14	1.49	2.43	1.25
Group 2 — (SDEN 2–3)	2.78	0.972	2.56	1.01	2.44	1.01	3.22	1.09
Group 3 — (SDEN 2–3)	3.73	0.883	2.67	0.816	2.67	0.816	2.33	1.23
Group 4 — (SDEN 3)	3.00	0.707	1.89	0.782	2.11	0.782	3.11	0.782
Overall mean score	3.43	1.07	2.59	1.04	2.30	1.19	2.65	1.18
Wine	**χ^2**		**Degree of freedom**		***p*-value**		**ε^2**	
Wine 1 — Kleine Schorre (The Netherlands)	8.70		3		0.034		0.1642	
Wine 2 — Vavasour (New Zealand)	5.37		3		0.146		0.1014	
Wine 3 — Chateau Bolaire (France)	3.00		3		0.392		0.0565	
Wine 4 — Betuws Wijndomein (The Netherlands)	6.29		3		0.098		0.1186	

found in England that produces high quality chardonnay-based sparkling wines (McCoy, 2019).

Results from the blind tasting experiment confirmed the intrinsic quality of FRG varieties in comparison to *Vitis vinifera* grape varieties. The Dutch red wine from Betuws Wijndomein made from the FRG grape varieties Cabernet Cortis and Regent scored on average higher than the red Bordeaux blend from France Chateau Bolaire made from Cabernet Sauvignon, Cabernet Franc and Merlot. Results show that FRG varieties can provide the same intrinsic value when compared to wines from *Vitis vinifera* grape varieties. Similar results were found in research done by Meer and Lévite (2010) where consumers rated (FRG) Solaris as being equivalent to (*Vitis vinifera*) Riesling. Pierik (2018) also suggests that Regent has a similar taste profile when compared with a Merlot from Bordeaux. Results from the blind tasting experiment confirm this statement. Therefore, sales and marketing efforts for FRG varieties should be increased.

In terms of sustainability, FRG varieties offer substantial benefits, however, this is unknown among wine consumers. Wine consumers hold a negative image of wines from FRG varieties and consider them lesser quality (Pedneault & Provost, 2016; Sloan et al., 2010). This is not based on fact nor on the findings of this research. The usage of pesticides on FRG grape varieties is significantly lower when compared to other wine regions who use *Vitis vinifera* varieties. This offers high value to the health-conscious and sustainable-living aware wine consumer. Wine consumers are more willing to purchase wines with sustainable benefits (Mihailescu et al., 2021) and are also more willing to consume sustainable and local wines (Palmieri & Perito, 2020). The trend towards more local food consumption is gaining considerable traction among consumers (Klomp & Oosterwaal, 2021). Therefore, Dutch wine has a unique position for further growth in the coming years. Restaurateurs can effectively increase their marketing efforts in local and sustainable Dutch wines. Active collaboration between wine growers and restauranteurs and retailers should also be stimulated, as a result, wine growers could sell their wines more easily. Profitability remains an issue among wine growers in The Netherlands, so increased stakeholder dialogue can provide benefits to both winemakers and restauranteurs because healthier profit margins can be attained.

Conclusion

The premise of this research was to analyse the competitiveness that Dutch wine has in comparison to wines from more well-known wine regions. Thus, it explored if Dutch wines can be included in a restaurant's food and beverage offerings, while also strengthening the sustainable position. Findings from this research shed new light on the competitiveness that Dutch wine has, based on their intrinsic quality and the future prospect of The Netherlands as a wine-growing region. Adoption of Dutch wine among wine consumers and offerings among restaurateurs could become more common in the near future according to the findings of this research. The main reason is due to the increasing quality of Dutch wine, which is also evident based on the findings of this study. Popular wine countries among Dutch wine consumers such as France and New Zealand could also be substituted by local Dutch wine in a food and beverage programme. The second aim of this study was to explore the sustainable benefits of increasing the adoption of local wines in The Netherlands. The benefits of local wine consumption is gaining more importance among wine consumers and therefore this creates a unique selling point. Also, this factor can increase the future adoption of Dutch wine among wine consumers in The Netherlands.

The increasing quality of Dutch wines and their unique sustainable position are of critical importance to the future prosperity of The Netherlands being a wine-growing region. Further sales and marketing efforts can lead to a wider adoption among wine consumers in The Netherlands, given the local and sustainable food trend. Moreover, this research also shows that the prejudice towards FRG grape varieties is not based on the intrinsic quality that they can offer and that, in terms of sustainability, they are unique in the world of wine. The combination of the quality of Dutch wines and their sustainable benefits creates a unique differentiating factor and offers high value to the wine consumer.

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Teleworking and the jobs of tomorrow

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ABSTRACT: Teleworking's popularity as a flexible working arrangement has been on the rise. Today, it is a hot topic of discussion among employees and employers alike. The COVID-19 pandemic has accelerated the popularity of this trend and has convinced many that teleworking is here to stay. This review article aims to describe the characteristics of teleworking pre- and post-pandemic and shed light on future challenges and opportunities. Empirical evidence promotes a favourable association between teleworking and benefits to employers' profitability and employees' health and well-being. Nevertheless, some employees have experienced a negative impact on their health due to teleworking, primarily due to ergonomics, and higher levels of stress, anxiety and loneliness. The overall conclusion shows that with proper job design, leadership and organisational support and adequate information communication technology (ICT), teleworking will be central to the future of jobs.

KEYWORDS: employee well-being, flexible work, future of jobs, human resources, hybrid work

Introduction

Flexible working arrangements, offering flexibility over where and when people work, are more and more necessary and in demand by employers and employees alike. Employees today have different work expectations, yet many organisational policies and procedures have not fully adapted to accommodate this change (Ayling, 2021; Tabet, 2020).

According to the Chartered Institute of Personnel and Development (CIPD), flexible working arrangements include but are not limited to: part-time working, term-time working, job sharing, flexitime, compressed hours, annual hours, working remotely regularly, career breaks, commissioned outcomes, zero-hours contracts and remote work or teleworking (Ayling, 2021). Many employees argue the importance of flexibility and the desire to work remotely (DeMicco & Liu, 2021; Dmitrieva, 2021).

Researchers agree that flexible working arrangements are beneficial to employers and employees alike. Flexible working arrangements help lower employees' stress levels, increase job satisfaction, improve loyalty and commitment and reduce costs for employers and employees alike (Garad & Ismail, 2018; Johnson, 2011; Kelliher & Anderson, 2010; Lewis et al., 2000; Ramakrishnan & Arokiasamy, 2019; Xiang et al., 2021).

With the COVID-19 pandemic, the hospitality industry suffered from many restrictions. Many establishments had to shut down, and many employees lost their jobs. The hospitality industry lost 5.9 million jobs by April 2020 (Maze, 2020). When the hospitality industry began to recover in 2021, the recovery was hindered as the industry could not find enough employees. Post-pandemic research shows that many employees who left or lost their jobs refuse to return to the industry (DeMicco & Liu, 2021). A survey by Bloomberg shows that half of the hospitality employees who lost their jobs in the USA do not want to return to their previous jobs. Many of these employees are asking for better working conditions, better compensation and benefits, additional flexibility and the desire to work remotely (Dmitrieva, 2021). Today, the hospitality industry faces existential environmental forces causing a rapid job transformation (Sethi et al., 2021). It is imperative to employ a variety of creative approaches to secure staffing needs reliably. With the increase in demand for more flexibility, hospitality establishments must consider flexible work arrangements as part of their retention strategy. Even though some hospitality employees already worked remotely during the crisis, service staff working on shift-based rota must present on-site. However, hospitality employers must create flexible and hybrid working models to fit individual needs (Cresswell, 2021).

What is teleworking?

Remote work or teleworking refers to an agreement created by the employer and the employee to enhance the latter's work-life balance while fulfilling the organisation's requirements through information communication technologies (ICT) (Beauregard et al., 2019; Gutierrez-Diez et al., 2018). Teleworking found its origin in the US state of California in the mid-1970s to substitute for the daily commute through telecommunication technology (Nilles, 1994). In response to the energy crisis of 1973, employees could not commute to work frequently, thus, organisations had to develop appropriate alternatives (Torten et al., 2016).

Scholars' first description of teleworking is outdated by today's standards. The early concept was associated with work done through fixed telephones, fax machines and giant stationary

computers (Makimoto & Manners, 1997). Other scholars tried to classify teleworking with other forms of work arrangements without connecting it back to its historical roots. It was classified as one of the forms of flexible work together with part-time work, flexi-time and others (Kossek et al., 2011). Historically or typologically, scholars did not connect teleworking with modern ICT. The absence of ICT limited teleworking's definitional potential and limited the possibilities to study its development over time. Thus, teleworking faced stagnation in its early conceptual understanding and even declined in the following years (Hjorthol, 2006; Brenke, 2014). On the other hand, ICT continued to evolve rapidly.

Craipeau (2010) was the first scholar to connect teleworking to modern ICT, describing ICT advancements as the primary enabler and main contributor to its development. Building on Craipeau's evolutionary approach, scholars developed teleworking's progression from the home office and the mobile office to today's virtual office and beyond (Messenger, 2019).

Teleworking during the COVID-19 pandemic

The COVID-19 pandemic has brought unprecedented changes to the world of work as we know it. The pandemic has prompted governments worldwide to put in place rules and regulations to prevent the spread of the disease, forcing many businesses to continue operating through teleworking arrangements (Amirul et al., 2021; Béland et al., 2020). In 2020, 47% of employees in Australia, France and the United Kingdom teleworked. In Japan, teleworking increased from 10% to 28% between December 2019 and May 2020 (Organisation for Economic Co-operation and Development [OECD], 2021). In 2020, estimates suggest that 40% of employees in the European Union started teleworking full-time; the highest rates were found among teachers, ICT professionals and managers (Ceurstemont, 2020).

Several governments officially endorsed teleworking and offered employee and employer advice; for example, the United Kingdom and the Netherlands offered a tax exemption for home office costs. On the other hand, the USA offered a complete guide to telework and provided resources to employers and employees. Working from home was one of the most effective ways to reduce exposure to the virus, according to the UK's Scientific Advisory Group for Emergencies (SAGE, 2022). Even though working from home has gradually increased in the past decade (Eurostat, 2018), the pandemic and the lockdown have fast-tracked many employers' adoption of teleworking modalities (International Labour Organization [ILO], 2020). Nevertheless, the transition was not an easy one; evidence today suggests that the massive implementation of teleworking happened prematurely and without much consideration due to the nature of the pandemic (Ahrendt et al., 2020). The traditional work setup has swiftly shifted from the office setting to a permanent online presence; thus, working from home has quickly become the new normal (Bajarin, 2021; Dickler, 2021; *Economic Times*, 2022; *NL Times*, 2022; Melin & Egkolfopoulou, 2021; *UN News*, 2022; Zeidner, 2020).

During the lockdown, many factors influenced teleworking, from the firm's size to the employees' qualifications, job characteristics and even gender. Key findings from a study published by the OECD (2021) concluded the following: i. over 50% of employees were working in highly digitalised industry teleworked; ii. teleworking was higher among employees of large firms; iii. employees with higher academic qualifications were more likely to telework; and iv. in most countries teleworking was higher among women than men (OECD, 2021).

Teleworking post-pandemic

The year 2022 began with the gradual lifting of different COVID-19 restrictions, with the advice to work from home as much as possible amended. Nevertheless, similar to how 9/11 changed the world of travel forever, the COVID-19 pandemic will have a long-lasting impact on the future of work. It is expected that many organisations are likely to rethink the locations from which their employees can effectively, efficiently and safely fulfil their work roles and responsibilities (Fleming, 2020). Big tech companies are pioneering the push in post-pandemic teleworking and smaller companies will soon follow suit (Hatamleh & Tilesch, 2020). For example, Mark Zuckerberg, CEO of Meta, expects 50% of Facebook employees to be working from home by 2030 (Friedman, 2020). Twitter's CEO, Jack Dorsey, confirmed that his employees could work from home permanently or wherever they feel the most productive and creative. Microsoft will adopt a hybrid model (both at-home and in-office), while Google will remain open to all options. On the other hand, Amazon will decentralise work arrangement decisions and white-collar office employees will have the freedom to work remotely or adopt a hybrid model (Kelly, 2022).

FlexJobs, a leading job search site, lists the top career fields for remote work in 2022. The list includes the fields of accounting and finance, marketing, medical and health, project management, customer service, HR and recruiting, sales, administrative, education and training. The site also analyses the job posting history of more than 57 000 companies. Since 2014, it has published an annual top-company list with remote jobs to watch. Flexjobs saw a 12% increase in listings for teleworking jobs between 2021 and 2020. The majority of these listings were for professional and managerial roles. The list of Top 100 companies in 2022 includes a record number of new companies and various titles, confirming that the shift to remote hiring and teleworking is here to stay (McGregor, 2022; Pelta, 2022).

Many employees have realised that working from home is not only for the short term, but will also continue post-pandemic. The realisation enticed people to invest in their home offices. Some even invested in bigger homes that could accommodate a home office. A survey conducted by the World Economic Forum in 2020 shows that 98% of general employees want to continue teleworking after the pandemic (Dunn, 2020). A report published by McKinsey Global Institute on the future of work in 2021 also confirmed that the pandemic has accelerated trends in teleworking. Trends like remote work and virtual meetings are likely to continue post-pandemic. The report presented a survey of 278 executives that believed that office space would be reduced by 30% post-pandemic (Lund et al., 2021). According to Gallup, an American analytics and advisory company, more than 90% of US employees did some remote work during the pandemic. Nine out of ten of these employees want to maintain remote work to a certain degree. Equally, 40% are willing to quit and look for another job if their current employer does not offer this option (Saad & Wigert, 2021). Global Workplace Analytics, a California-based business management consultancy firm, estimates that 56% of the US workforce already holds jobs compatible with teleworking. The firm also forecasts that 25 to

30% of employees will continue teleworking one or more days per week post-pandemic (Lister, 2022).

Research from 1 515 Dutch employees shows that job characteristics played a crucial role in adapting to teleworking during COVID-19; office employees and teaching staff were more likely to work from home. According to the study, office staff in the Netherlands are most likely to continue working from home post-pandemic. The positive experience, higher productivity, employers' support and good ICT contribute to this decision (Olde Kalter et al., 2021). More than 50% of participants in a research project that analysed teleworking in Saudi Arabia advocated continuing teleworking beyond the pandemic due to its benefits on their social and work life (Zalat & Bolbol, 2022).

Technology and teleworking

Over the past decades, the technology supporting teleworking has improved remarkably. Today, technology and artificial intelligence (AI) influence how people lead their lives and run businesses. Literature on new ICT and teleworking is often outdated and inapplicable in the rapidly changing technological environment. Ongoing technological advances are impacting organisational strategies and the world of work. Adapting to the incredible pace of technology change adds to the challenge of managing today's workforce. However, researchers agree that companies embracing new technologies will enjoy a competitive advantage over those that do not (Edwards, 2017; Kozielski & Sarna, 2020; Lee & Grewal, 2004; Lupșa-Tătaru, 2019).

The traditional nine-to-five mentality has undergone a swift change in a highly technological era where employees can work from anywhere and at any time through different electronic platforms. In the past, individuals could not work when their physical working space was closed during holidays, weekends, evenings, or at night. Today, depending on the working culture, employees can and are expected to access their work remotely and respond to requests regardless of the day and at any time (Von Bergen et al., 2019).

Through clear and well-defined processes and ICT infrastructure, employees are more capable of working remotely and producing results. Many companies will deploy AI to assist in the transition to teleworking, especially in monitoring employees working remotely. Existing surveillance technology (Booth, 2019) will be widely deployed. More sophisticated technology will be used to monitor employees' progress and productivity. Companies will also have to strengthen their cybersecurity. Working online during the pandemic exposed many vulnerabilities, leaving companies prone to cyberattacks (Ceurstemont, 2020).

Leadership, work culture and teleworking

A new management paradigm and a leadership approach enabled teleworking; doing the work became more important than where the work occurs (Belzunegui-Eraso & Erro-Garcés, 2020; Tokarchuk et al., 2021). Trust is a critical component that makes it possible for leaders to create the right conditions for employees to excel and positively fulfil their job requirements remotely. According to Frei and Morriss (2020), leaders should identify their strengths and weaknesses regarding the three core drivers of trust: authenticity, logic and empathy. These core drivers should be developed further and be part of a leadership style compatible with teleworking.

Research conducted during the pandemic shows that many managers struggle while managing their employees, who complain of feeling untrusted and micromanaged (Parker et al., 2020). Many managers suspect that employee productivity and performance decrease when working remotely. While, at the same time, senior leadership confirms that productivity was maintained and increased when employees were forced to work remotely (Mariniello, 2021). Successful implementation of teleworking depends significantly on the degree of autonomy employees are granted and a presumed culture of trust and compassion that organisational leaders can create (Bérastégui, 2021). Simply telling the managers to trust their employees is not enough. Parker et al. (2020) recommend supporting managers in developing delegation and empowerment skills to enable their teams' motivation, health and performance.

With a clear vision of success and the ability to determine a suitable course of action, employees can work from anywhere. Organisational leaders must first identify the desired outcome and support employees with the right processes, infrastructure management, oversight and results. An honest discussion on how teleworking will impact administration and costs should also occur (Fernandez, 2021). Organisational support to teleworking employees is essential. Bentley et al. (2016) emphasised that adequate organisational support positively impacts employee well-being and job satisfaction and reduces psychological strain and employee isolation while teleworking.

Before the pandemic, 85% of European employees never teleworked or considered that their job could be done remotely (Milasi et al., 2021). The transition from a well-defined structure to a very fluid one was not without stress and anxiety. Parker et al. (2020) highlighted the impact of job design on employee stress, anxiety, depression and burnout, stressing the importance of having an appropriate job design to facilitate and support employee productivity. Organisational leaders must impact employee well-being and help avoid emotional exhaustion due to the sudden and drastic changes. Leaders must reduce exhaustion while teleworking by ensuring employees understand their role, are self-efficacious and have task interdependence (Mihalca et al., 2021). According to the World Economic Forum's *The Future of Jobs* Report 2020, a third of all employers are likely to take initiatives to create a sense of community, connection and belonging for teleworking employees through digital platforms. These actions aim to address challenges posed by the shift to teleworking (Zahidi et al., 2020).

The legal framework

The pandemic has accelerated pre-existing trends towards more flexibility and the digitalisation of work. As time goes by, flexible working in general and teleworking will likely become a prominent and more permanent feature. Today, governments are scrambling to review and upgrade legislation to facilitate a transition to safe teleworking.

A report published by the European Agency for Safety and Health at work (EU-OSHA) in March 2021 confirmed that Italy, Luxembourg, Latvia, Slovakia and Spain have already implemented legal changes. Austria, Belgium, Cyprus, Croatia, Hungary, Ireland, Germany, the Netherlands, Malta, Poland, Portugal and Slovenia have reviewed their legislation. According

to the report, changes in legislation related to teleworking are focused on four areas: i. the definition of teleworking and the distinction between occasional and permanent teleworking; ii. the right of employees to disconnect; iii. the right to telework; and iv. occupational health and safety provisions (Sanz de Miguel et al., 2021).

In the US, the Telework Enhancement Act of 2010 was signed into law on 9 December 2010. The legislation organised teleworking for eligible employees and transformed federal telework in many ways. The new legislation opened the door to new research on teleworking by the private and public sectors. It identified and recommended best practices to the federal government. The Enhancement Act of 2010 also obliged the government to review the impact of increased teleworking, including energy consumption, traffic, job creation and availability (Sarbanes, 2010). In 2020, the US Senate introduced the Pandemic Federal Telework Act to allow eligible employees to telework full-time during a public health emergency (Van Hollen, 2020).

Teleworking, challenges and opportunities

Researchers outline the many benefits of teleworking for both organisations and employees, such as reducing environmental damage, saving costs, flexibility, autonomy and work-life balance. Nevertheless, research also highlights potential drawbacks ranging from higher ergonomic risks for employees to extended availability, transition to new work modalities, costs for organisations and increased workload leading to work-life conflict, stress, depression and isolation (De Macêdo et al., 2020; Harpaz, 2002; Sanz de Miguel et al., 2021; Tavares, 2017).

Some of the top benefits associated with teleworking are employee loyalty, satisfaction and higher employee retention and attraction rates (Bailey & Kurland, 2002). Teleworking allows employees to balance work and personal life, maximise the time spent on work and leisure, and reduce stress, fatigue, travel time and costs (Major et al., 2008). Employees tend to respond with a higher commitment to an organisation that offers them the flexibility to fulfil their personal needs (Golden, 2006). A study of 413 teleworking employees in Saudi Arabia identified many benefits and health problems associated with telework. Benefits included saving time and money and improving the work-life balance. In contrast, musculoskeletal and work-related stress were telework-associated health problems (Zalat & Bolbol, 2022).

On the other hand, a theoretical model by Taskin and Bridoux (2010) draws on the literature to identify the determinants of effective transfer of knowledge between teleworkers and non-teleworkers. The authors concluded that teleworking is likely to negatively influence cognitive and relational components of organisational socialisation, a key facilitator in knowledge transfer. Research studying the benefits of teleworking in the Dutch public sector found that public servants have experienced teleworking negatively. Their experience was characterised by high professional isolation and low organisational commitment when fully working from home. The research also found that teleworking had no positive impact on employee engagement (De Vries et al., 2019).

Teleworking in the hospitality industry

Even though there are many advantages offered by teleworking, some believe that the hospitality industry will be slow to embrace this trend. Only a few employees from the industry will be able to telework, perhaps the top performers in sales or accounting where daily face-to-face meetings are not needed (Whitford, 2000). Nevertheless, during the COVID-19 pandemic, some roles in the industry were less likely to be eliminated. Those in technology-based roles were often lucky to keep their jobs to support staff working remotely, in many cases for the first time (Pendlebury, n.d.). The hospitality industry is not exempt from the new workplace trends, including the drastic shift from traditional office to hybrid work. Teleworking did not spare hotel executives, administration staff, sales and marketing professionals and many others who were obliged to work from home during the pandemic. Whether teleworking is the future of work or just a temporary arrangement due to the pandemic, many hospitality employees worked and will continue working from home, at least for the foreseeable future (Mamaysky, 2022). Like employees in different industries, teleworking hospitality staff had to deal with similar challenges, from ensuring collaboration and cooperation between teams, tracking deliverables, managing home distractions, avoiding overwork, alienation and loneliness. Hospitality teleworkers also enjoyed similar benefits of a healthier work-life balance.

Before the pandemic, hospitality staff who spent practically most of their time at work finally discovered a new work-life balance model. Employees and employers alike realised that they were still doing the same work and producing the same results from behind the laptop, whether at home or in the office. Also, how much money, time and effort were saved and how many carbon emissions were cut by not commuting every day to the office (Singh, 2021).

Conclusion

The world has changed post-pandemic, and the popularity of remote work or teleworking is increasing worldwide. After being forced to work from home during the COVID-19 lockdowns, employees see the benefit and are choosing to continue in this work form. Teleworking has improved employees' work productivity and boosted their social and personal life by promoting a healthier work-life balance. Deciding where the work is done is slowly slipping away from the control of companies as more employees demand additional flexibility. Nevertheless, teleworking has particular characteristics and requires specific conditions to do the job successfully. Employees' personality traits, job design, leadership and organisational support and the proper ICT setup will dictate the pros and cons of remote work.

A paradigm shift in managing hospitality jobs is in desperate need today. Now that many researchers have underlined the benefits of teleworking for both employers and employees, it is time for the hospitality industry to test this system. The pandemic has shown that much of the office space can be released, and savings can be invested in employee well-being. Teleworking also eliminated the need for middle managers. The need for people who can do the job became much higher than those who can manage it. The future of hospitality jobs should focus on flexibility and profitability. As a first step, save on office rent, remove geographical limitations to working and hiring, and trim unnecessary fat.

As teleworking in the hospitality industry remains scarce, future research should continue studying the effects of teleworking and hybrid work forms and the impact on employee

health and productivity in the hospitality industry. A new line of research could be investigating the impact of telework and hybrid work forms on attracting and retaining talent.

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REVIEW
ARTICLE

Impact of COVID-19 on the global hospitality industry: a brief review of current academic literature and meta-analysis to determine primary qualitative themes

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ABSTRACT: The purpose of this study is to examine the current literature pertaining to the impact of COVID-19 on the global hospitality industry. The research has a two-fold approach. First, a succinct examination of the literature highlights the significant negative effects of the pandemic on the multiple fields of hospitality. Second, a lexicological meta-analysis is completed with a relatively small sample of the current literature to find congruency of qualitative themes across the gleaned research. It is apparent that multiple instances of concentration are evident in the ongoing research. However, five primary themes were identified during the analysis. This study is beneficial as a "snapshot" of current research within the field and a starting point for more in-depth investigation to commence.

KEYWORDS: COVID-19 impact, international hospitality commerce, inquiry, literature review

Introduction

COVID-19 has reached epidemic proportions as the virus continues to evolve (McCallum et al., 2021; Sigal, 2022; Takashita et al., 2022) and mutate. The current pandemic has impacted most industries, economies and societies to a degree across the globe (Siddiqui, 2020). Hospitality fields of endeavour are feeling the burden of the onslaught as operations are disrupted while trying to navigate the ever-changing environment. As the virus is a hot topic which is on most people's minds, research in the academic arena has come to the forefront of interest, not only considering the mechanics of the disease, but its impact in various fields. Researchers are attempting and struggling to keep current as viral mutations continue to evolve, and its impact on societies and industries is constantly changing at a dramatic rate (Davahli et al., 2020; Haleem et al., 2020).

The purpose of this study is to formulate a general understanding of how the pandemic has affected the hospitality industry in a global context. Specifically, an understanding of the current research paths in the industry through the determination of investigation concentrations is desired as the research is relatively new. The current pandemic is modern, without any previous literature explicitly focused on a virus that did not exist until approximately three years previously.

An approach was deployed to search for significant current research concerning the impact of the virus on the hospitality industry. Current literature was captured and reviewed, and conclusions were drawn concerning the primary themes discovered across the articles analysed.

Literature review

An approach to finding relevant hospitality industry academic literature was deployed with the use of keyword searches utilising Google Scholar and journal databases held in the electronic libraries of Lander University and New Mexico State University. Keywords included, and were not limited to *hospitality industry*, *covid*, *COVID-19*, *impact* and *pandemic*. Returns were relatively substantial in current literature as the impact of the virus has driven an overwhelming concentration on the subject. However, articles were chosen that specifically addressed the impact of the virus on the industry, were current within the past two years and realised relatively strong citations scores. Thirty-six articles were selected, reviewed and analysed for qualitative thematic congruency. The review highlights significant impact across multiple segments of the hospitality industry. The thematic congruency discovery through meta-analysis is discussed in the research methodology and summary sections.

Hospitality industry generalisations

Across the hospitality industry, there is a significant loss of labour within the market (Baum et al., 2020) that are either not able to work, not willing to work, or have selected alternative fields of employment. This is not only a case for the hospitality industry, but is also evident across multiple trades. During the pandemic, there has also been a realised loss of customer or consumer demand (Gursoy & Chi, 2020). This is driven by the closure of establishments and patrons fearful of being out in public. The future of the hospitality industry as a whole is still uncertain. A

global recession is being realised (Crespí-Cladera et al., 2021) and its duration and long-term impact are still to be seen.

Lockdown and impact

Reviewing historical studies of previous epidemics, response to lockdown and impact are similar today as in the past (Kim et al., 2020). The current literature supports this fact; however, it also points out specific effects across multiple industry segments.

Travel and tourism

Travel and tourism are impacted by lockdowns negatively as much of the global travel segment of the industry was halted or significantly diminished. Many forms of travel including air, rail, bus and ship were frozen, and business and leisure travel were all but halted for a significant period. Without methods of transport, the tourism industry was crippled without a supply of potential customers (Quang et al., 2022) to patronise their offerings and locations. Significant decline and recession are evident not only in the travel industry, but in the destinations that are reliant on their support (Duarte Alonso et al., 2020).

Food and beverages

Food and beverages, while making some recovery as restrictions eased, faltered as the virus spread across the planet. Temporary closures from fine dining to fast-food were the norm during the early days of the pandemic (Dube et al., 2020). Many restaurants have yet to reopen, and when they do reopen, they are often restricted with limitations to capacity (Nhamo et al., 2020).

To coincide with this loss, food and beverage operations are also realising that as restrictions and limitations are lifted, pre-pandemic numbers are not being met as many customers have not returned (Gursoy et al., 2020). This could be based on a myriad of issues, including that potential consumers are afraid to venture out in public. Lack of available clientele is certainly problematic, however, when and if customers return, there is another caveat to consider. The supply chain providing everything from the simplest to the most complex foodstuffs has been severely crippled (Aday & Aday, 2020). Also, there is a significant lack of labour supply willing to meet the demand of a hungry public (Bucak & Yiğit, 2021).

Food and beverage business owners are facing possible dire consequences if circumstances do not improve soon as supply and demand are out of sync. During the pandemic, many consumers were also staying home and consuming increased amounts of alcohol (Barbosa et al., 2021; Biddle et al., 2020). These actions are possibly taking the "beer out of the hand" of local neighbourhood bars and restaurants.

A few positive realisations are of note concerning the food and beverage industry during the COVID-19 surge. As business owners were faced with diminished patronage, they made changes in their service offerings to supplement some of the lost income. There is an augmentation of alternative methods to sell their items (Jung et al., 2021). Increases in takeaways/takeouts, delivery, third-party transport and technology have propelled some owners beyond the possibilities of closing their operational doors (Hemmington & Neill, 2022; Hoang & Suleri, 2021). An increase in health, sanitation and safety awareness and practices is also evident (de Freitas & Stedefeldt, 2020). Business owners are putting measures in place to not only make sure that their employees are practising appropriate measures to stay safe and healthy, but that they are also implementing these practices with the potential consumer in mind. This is attractive to many patrons who are very wary of coming into contact with anything that may cause them to become sick.

Accommodation

Hotels, motels, bed and breakfasts, hostels and resorts have closed, been restricted with availability and are dealing with uncertainty for the future. The lockdowns have caused a lack of potential clientele as well as a slowdown in available labour to meet demand. Some of the impact has been based on the negative sentiment of patrons that do not want to venture beyond the perceived safety of their homes and into a place they do not have control over safety (Gursoy & Chi, 2020). As a result, not only have small independent accommodation business owners closed their doors, many major hotels have followed suit (Rotondo, 2021), and over 700 000 rooms continue to be closed temporarily across the globe (Baker, 2021). The future of accommodations is uncertain, and recovery is beginning to take place as restrictions are lifted. However, the realised recuperation is slow.

Entertainment and recreation

Theatres, amusement parks, live music venues and other entertainment settings were closed and/or limited during the pandemic. Limited recovery is just now being accomplished as concerts, live theatre, movie venues and amusement parks are beginning limited operations in most areas. However, many are recovering well as most restrictions have been lifted in certain locations and people are eager to get back to some sort of normalcy.

Gaming venues, including race tracks, general sports gambling establishments and casinos were closed and these destinations have declined to a degree (Ho, 2020). Because the gambling adoring public was not able to get their "fix", an increase in online gambling (Emond et al., 2021) was evident during the early days of the pandemic. Some traditional gaming institutions were able to take advantage of this new opportunity. However, gambling destinations have a long road to recovery, and this segment of the hospitality industry is seeing one of the slowest improvement rates (Ho, 2020).

Future and recovery

The hospitality industry is reeling with uncertainty as the future impact of the virus is unknown. The virus continues to mutate, and forecasting the reliability of how industries will cope is unclear (Chen et al., 2021). However, while all the negativity associated with the impact of the virus is evident, recovery is becoming more promising as travel bans and restrictions are slowly easing (Coutaux, 2021). As restrictions are lifted, however, uncertainty with labour force supply sustainability is becoming evident (Shigihara, 2020). If changes are not made to supply chain, health and safety, technology and labour offerings, the future might not be as bright as some hope.

Methodology

The purpose of this study is to review the current academic literature considering how the COVID-19 pandemic has impacted the hospitality industry on a global scale. To coincide with a review to garner a succinct understanding of the subject, a concise meta-analysis was performed to uncover the main qualitative themes in the articles reviewed. A rigorous search and data analysis of the literature was performed.

Data collection

A search started for academic literature that focused on the impact of COVID-19 in the global hospitality industry. Google Scholar and electronic libraries from public universities were searched for relevant information concerning the subject. Thirty-six scholarly articles were selected for analysis based on publication dates within a relative timeframe of three to four years maximum and high citation scores. The articles were organised into a Mendeley reference library repository for ease of association and analysis. The articles were reviewed and analysed using qualitative assessment software. MAXQDA2020 qualitative research suite was used to organise the articles, facilitate lexical searches and manually code the thematic instances. The papers were all from publications that are considered academic research journals in the hospitality industry field with significant citation scores.

Data analysis

Documents were reviewed for content, rigour and relevancy about the impact of the current pandemic on the global hospitality industry. Using the MAXQDA2020 qualitative research suite, a lexical search was employed to determine the emerging similar qualitative themes. The analysis uncovered multiple themes, over 30, that were identified in the literature. However, a succinct account of the top five themes is presented here.

Results

Themes

Over 30 substantial qualitative themes were discovered during qualitative analysis. Five themes are predominant through frequency and are applicable for discussion. Table 1 is a list of the top five themes.

Sustainability

Sustainability, with 290 instances, is the foremost qualitative realisation in the data analysis. A realised lack of sustainability in an operational context in the industry and the development of sustainability were both identified. The texts present concern for the future of the industry if sustainability is not developed in time for survival and the ability to cope with sustainability ambiguity is evident. A sample of excerpts is found in Table 2.

Health

Health (n = 267) is also a primary concern in the industry. Health is not only a concern of employees, but for the public. Samples of instances are illustrated in Table 3.

Financial impact

As a capitalistic industry, the ability to make money is a foremost concern for businesses. The financial impact of the COVID-19 pandemic was evident in the literature with 244 discovered instances. Text extracts from the literature are illustrated in Table 4.

TABLE 1: Top thematic instances (N = 36)

Thematic code	Number of instances	Number of documents
Sustainability	290	18
Health	267	23
Financial impact	244	20
Employee	216	18
Safety	186	17

Employees and employment

Impact on the employment sector is evident in the literature, with 180 text excerpts found. Samples of these instances are illustrated in Table 5.

Safety

Safety of employees and the public were found as qualities in 155 coded segments. Samples of these are illustrated in Table 6.

Thematic similarities

This is a brief sample study of the current literature. However, harmony within a small sample (n = 36) of the literature is evident. Thirty-six journal articles concerning the global impact of the COVID-19 pandemic on a particular segment of the world economy were found to have similar themes. Not only were the themes similar in context, but they also illustrated rigour with the number

TABLE 2: Sustainability

Source	Text extract
(Jones & Comfort, 2020, p. 3037)	"dramatic effect the crisis has had on sustainability in the hospitality industry"
(Jung et al., 2021, p. 2)	"COVID-19 poses both threats and opportunities to the sustainability of the foodservice industry"
(McCartney et al., 2022, p. 61)	"sustain tourism recovery"
(Haleem et al., 2020, p. 1524)	"are finding it difficult to sustain"

TABLE 3: Health

Source	Text extract
(Wiitala & Mistry, 2022, p. 61)	"impacted employees' mental health"
(Haleem et al., 2020, p. 1526)	"COVID-19 pandemic is a public health emergency"
(Emond et al., 2021, p. 9)	"activities during lockdown for men and that women who were shielding for health reasons"
(Ho, 2020, p. 563)	"striking a careful balance between public health and economic needs"

TABLE 4: Financial impact

Source	Text extract
(Siddiqui, 2020, p. 26)	"they worry about their finances and their employment"
(Duarte Alonso et al., 2020, p. 8)	"devastating impacts on the financial health of the business"
(Nhamo et al., 2020, p. 205)	"This led to substantial financial losses"
(Emond et al., 2021, p. 8)	"financial hardship"

TABLE 5: Employees and employment

Source	Text extract
(Dube et al., 2020, p. 1487)	"unprecedented loss of employment"
(Baum et al., 2020, p. 2813)	"regard to responses to crises and their impact on employment in hospitality"
(Shigihara, 2020, p. 30)	"employee layoffs"
(Aday & Aday, 2020, p. 168)	"the health and safety of employees"

TABLE 6: Safety

Source	Text extract
(de Freitas & Stedefeldt, 2020, p. 1)	"responding to the pandemic in terms of the safety of food production"
(Kim et al., 2021, p. 423)	"safety food message framing as a survival strategy for small independent restaurants"
(Davahli et al., 2020, p. 9)	"following recommended safety guidelines and"
(Coutaux, 2021, p. 1)	"safety concerns ease and business travel improves"

of top themes evident in the number of "hits" or "instances" realised. While these findings are not necessarily groundbreaking research, it can be assumed that congruency can be found with other research articles as they continue to be written. The congruency of the top themes is illustrated in Figure 1.

Impressions

Much research has been recently conducted concerning the impact of the COVID-19 pandemic on the hospitality industry. It is also of note that there are few research articles available that compare and contrast similar themes in the field about the subject. Because of this fact, the study can provide a "snapshot" or a small sample of current literature to possibly base opinion upon concerning the influence of the disease on a particular industry. The pandemic has raised awareness of safety, health and instability for hospitality entities. Overall, the effects of the pandemic have been negative; however, through analysis of current literature areas of opportunity are evident. Scholars and practitioners may take note of where the concentration of current research lies and be able to adjust study efforts to address any potential gaps in the field. This study provides support of thematic similarity from a small sample of current hospitality industry literature addressing the impact of COVID-19. Furthermore, it adds a succinct review and comparison of the current knowledge to support possible needs of future research as this type of analysis gap exists.

Future research

This project is a snapshot of current literature on the subject of COVID-19's impact on the hospitality industry. Further research could include a longer linear observation of literature as it continues to evolve. Furthermore, the research could include a larger sample of literature across more diverse subjects in the field of the hospitality industry. Additional types of research in the industry could include surveys, global and regional economic impacts and addressing wider social issues concerning the pandemic. With additional insights, the research will become more robust and assist more practitioners and scholars in the field.

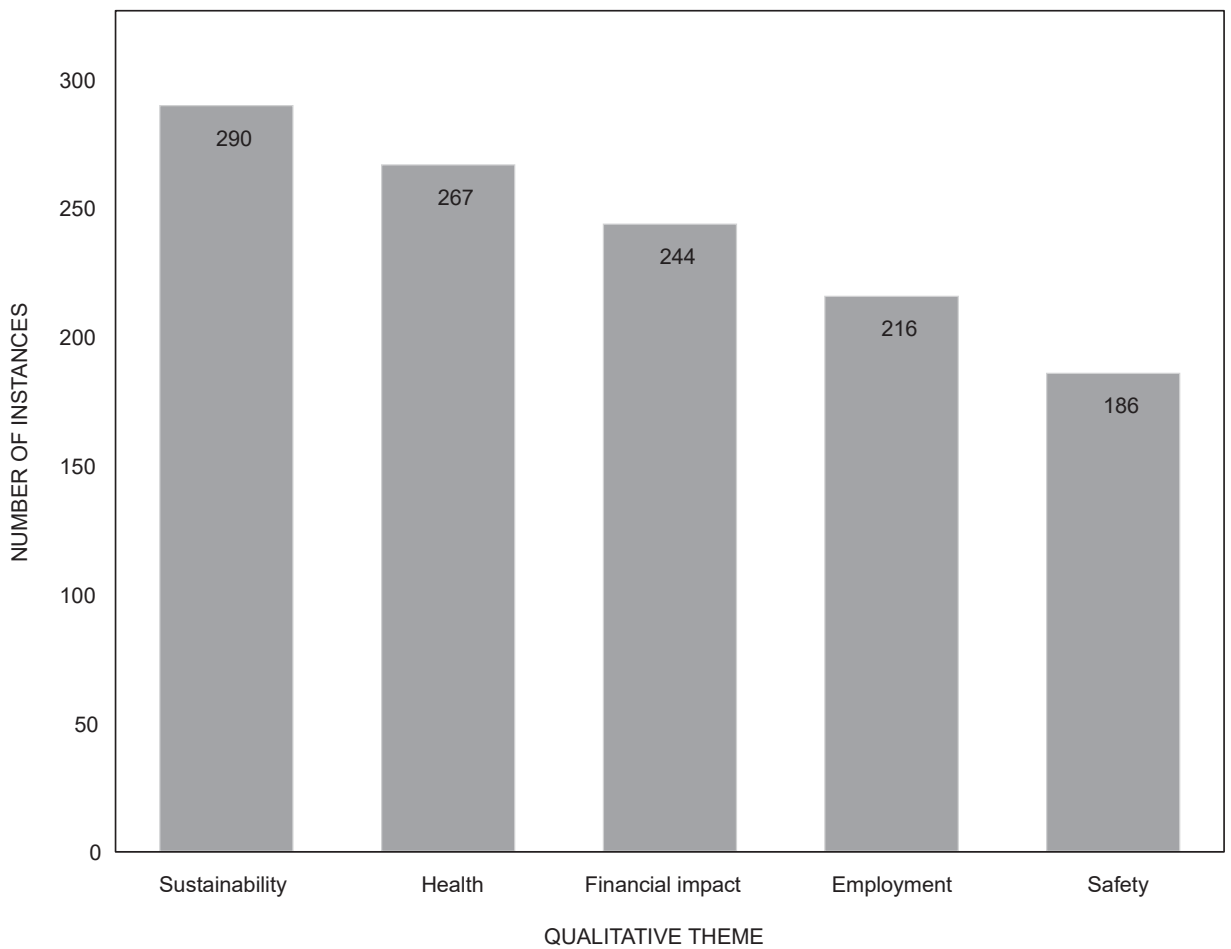

FIGURE 1: The five themes that were found to be prominent in 36 academic journal articles

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Hotel managers' perspectives of Airbnb operations in Accra Metropolis, Ghana

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ABSTRACT: The study was conducted to ascertain hotel managers' standpoints on the influx of Airbnb facilities in Ghana's hospitality "arena" and the palpable effects. Employing a qualitative approach to data collection, the study made use of in-depth interview guides, engaging 33 hoteliers to elicit information. The disruptive innovative theory was adopted as a guide to the study. Data were analysed using Nvivo to "couch" themes to make meaning from the transcriptions. The results analysed revealed that a sizable proportion of hoteliers (27) were aware that Airbnb facilities operated in the study area, while a few others were hearing of them for the first time. It was revealed that services rendered by these facilities were "distinct", making Airbnb more accepted by the youth. Other respondents opined that Airbnb constituted a "misgovernance" due to the unregulated nature of their services in the country. To others, it was an easy way for some property owners to evade taxation by listing on the website. Many hoteliers did not find their operations a challenge to their businesses due to their markedly different clientele, while to others these facilities posed a potential threat. The study recommends that the activities of Airbnb be regulated to make it easier for their inclusion in the tax net for revenue mobilisation for the state.

KEYWORDS: distinctiveness, hotel managers, tax evasion, unregulated

Introduction

Accommodation is one of the most essential needs of the tourism industry and is also considered the most visible and tangible aspect of the sector deemed crucial to tourists (Akyeampong, 2007) and, moreover, it is further categorised into serviced and non-serviced (Middleton et al., 2009). This is no different from the types of accommodation services offered at Airbnb facilities. In recent times, many tourists have relied on online market platforms for making reservations and the selection of accommodation facilities when travelling (Llop, 2017) and Airbnb is an example of such an online market platform used by tourists seeking accommodation facilities anywhere around the world. It has been noted that Airbnb hosts often have little or no hospitality experience or tourism management education, skills or experience. Yet they seem to compete so easily and well with the decades of experience that hotel chains and franchises possess. Airbnb is now known to provide hospitality for strangers in 7 million homes in over 100 000 cities globally and in addition to that, these hosts offer close to 40 000 guided local experiences across more than 1 000 cities worldwide (Fischer et al., 2019).

Morozov (2013) describes Airbnb as part of the sharing economy (collaborative consumption, collaborative economy, or peer economy) online community marketplace. The Airbnb concept hinges on up-to-date internet technologies with an emphasis on cost savings, sharing household amenities and the potential for more authentic local experiences, and this is achieved by targeting hosts and travellers alike (Guttentag, 2015). From the travellers' perspective, Airbnb's main aim is to single out adventure-seekers, city-break tourists and those who love to travel to exotic destinations. From a host perspective, those who wish to earn "some" extra money as a business through offering their homes to guests for short-term rental also engage with Airbnb platforms. In this way, guests have the opportunity to participate and interact with locals and gain different understandings of the norms, behaviours, habits and cultures of destinations that they visit (Schuckert et al., 2017). This concept also sheds more light on Stors and Kagermeier's (2015) finding that convenience and affordability play a pivotal role in a tourist's decision when selecting a place to stay, while Boakye (2010) identified security concerns as a factor influencing the type of accommodation a tourist chooses.

Airbnb therefore offers a wide range of selection options in different types of facilities like single rooms, suites, apartments, houseboats and many more on their website. Guests can search the Airbnb database not only by date and location, but also by price, type of property, amenities available and the language of the host. The guest can also add keywords and surf the internet to generate any other information that suits their preferences.

Brief history of Airbnb

The struggle to pay rent for an apartment by two 27-year-old men (university graduates) who had dreams of becoming entrepreneurs became the stepping stone to a significant transformation within the accommodation sector in the form of three air mattresses on the floor of a San Francisco apartment in 2007. The idea of renting out three airbeds on their living-room floor and cooking their guests breakfast at a fee of $80 per night to take advantage of an upcoming Design Conference which saw the city's hotels being fully booked was the game changer for them (Botsman & Rogers, 2010). Using a simple website, these two university graduates, Brian Chesky and Joe Gebbia, took advantage of a major conference in town to successfully advertise their apartment as an "Air, Bed & Breakfast" for conference delegates wishing to avoid the expensive hotels in the city. Its success with their first three guests allowed them to see that it was a brilliant business idea. The roommates recruited another friend, Nathan Blecharczyk, a computer science graduate who quickly transformed the website into a service site allowing other people to similarly advertise their spaces as shared accommodation for tourists with an initial focus on upcoming major events. This initial business plan became a success at the 2008 Democratic National Convention. The website was officially relaunched in August 2008 with the new name "Airbnb.com" and its services were quickly expanded beyond shared accommodations to include the rental of full residences, food and beverage, rides and novel experiences. Since then, Airbnb has grown extraordinarily popular and now books millions of rooms across the globe, making it a multibillion dollar company booking millions of rooms per night for tourists around the globe (Salter, 2012).

The concept of the "sharing economy"

This phenomenon of locals sharing lodging space with tourists for some benefits has existed for centuries (O'Gorman, 2010) but the innovation of the internet and mobile technologies has revolutionised this practice and allowed it to gain much popularity by facilitating a virtual market where communication and trust are established between hosts and guests. With the support of these various technology-based applications, those participating in the sharing economy have an opportunity to enhance consumer access and to mitigate the progressive commodification of assets (Olson & Kemp, 2015). Stors and Kagermeier (2015) identified two main drivers that foster the rapid growth of online sharing platforms as the internet (enabler) and technology (facilitator) of the matchmaking process between the demand and supply and people's changing values in post-materialistic positions. Morozov (2013) mentions Uber, a transport sharing app, and Airbnb, an accommodation platform, as the major market leaders of the sharing economy. The growing usage of peer-to-peer services like Airbnb and Uber in tourism and hospitality businesses starting about a decade ago has stimulated industry players to look at various ways of dealing with the effects of these new trends of collaborative consumption in the industry (Juho & Iis, 2017).

The recent advances in information communication technologies (ICT) and the widespread use of mobile devices has also influenced the consumption behaviour of most people, as such devices become the enablers of sharing economy concepts, where the consumers can find ways to buy, rent, or use goods and services with much lower prices and greater convenience (Pouri & Hilty, 2021). The boosting of the sharing economy with the common slogan "What's mine is yours" mainly affects the accommodation sector as it does not only offer moderate and affordable overnight stays, but that the visitors not only visit cities, but also enjoy a traditional environment and have an authentic experience (Stors & Kagermeier, 2015). Sharing makes a great deal of sense for the consumer, the environment and for communities if managed and balanced fairly by companies and governments. Thus, from the ecological, societal and developmental point of view, the sharing economy has become popular in contemporary times (Fischer et al., 2019).

The Airbnb story so far in Ghana and Africa

Airbnb is making a shift from novelty accommodation to a mainstream tourist option across many parts of Africa. Since launching Airbnb on the continent, the travel start-up has accordingly achieved well over 130 000 listings which have seen the continent receive over 3.5 million guest arrivals, with half of these guests arrivals recorded in the past year alone. Airbnb's growth on the continent is highlighted by one statistic: Nigeria, Ghana and Mozambique are all among Airbnb's eight fastest growing markets globally. The start-up's growing popularity is also reflected across the continent with seven countries all recording over 100% increase in guest arrivals over the past year (Airbnb, 2018; Yomi, 2018).

In Ghana, Airbnb, which has been described as a trusted community marketplace for people to list, discover and book unique accommodation around the world, has over 300 host listings across the regions of the country, with prices ranging from $10 to $200 per night. Thus, Ghana has been listed among the top eight countries in the world experiencing fast growth and the second-fastest growing host community in Africa, with close to 352% growth in guest arrivals in 2019 (Airbnb, 2018). The Airbnb website where reservations are made offers free registration and account creation to hosts and guests (Molz, 2014). These spaces vary widely, ranging from a living-room futon to an entire island (Wortham, 2011; Salter, 2012), Airbnb is said to provide a 24/7 customer support service, including $1 million worth of insurance for the host (Airbnb, 2018).

The competitive nature of the traditional hotel (accommodation) industry has compelled hotel managers to aim for higher performance. So it is crucial to identify and implement effective competitive strategies (Tavitiyaman et al., 2012). Using information technology, maintaining cost effectiveness, differentiating business offerings and encouraging service quality are among the tactics widely used by hotel managers to compete in the ever-changing hospitality and tourism industry (Jönsson & Devonish, 2009). The extant literature highlights several competitive strategies commonly adopted by hotels, including leveraging information technology, ensuring cost competitiveness, differentiating market offerings and promoting service quality (Jönsson & Devonish, 2009). However, the hospitality industry is dynamic and hotels are often challenged by the need to adapt to an ever-changing industry environment (Senior & Morphew, 1990).

The rise of Airbnb could therefore pose a considerable threat for the traditional accommodation sector as it allows ordinary persons to rent out their residence through the Airbnb website

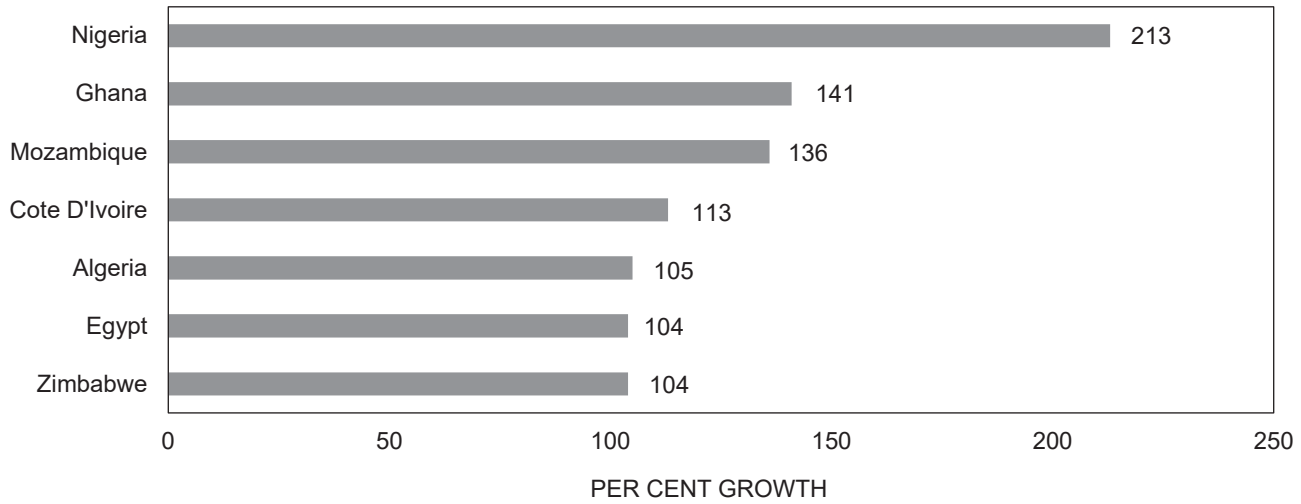

FIGURE 1: Year-to-year growth of Airbnb arrivals, July 2018 (adapted from Yomi, 2018, p. 1)

and, through this, millions of rooms are rented out in a year. To reiterate this concern, Stieler et al. (2017) drew a conclusion about hosts perceiving Airbnb as a "give-and-take" venture: once they have the space and another has the money, then exchange is readily done. It is against this background that this study seeks to investigate hotel managers' perception of Airbnb services and to explore if they perceive any threats regarding the "impact" of Airbnb on hotel businesses, with particular reference to the provision of accommodation in the hospitality sector in Ghana.

Statement of the problem

According to Guttentag (2015), Airbnb is an example of the rise of a disruptive innovation in the accommodation sector of the tourism and hospitality industry which allows ordinary people to rent and share surplus space. The growth of this disruptive innovation of collaborative economy in tourism and hospitality is a response to several challenges that the traditional tourism and hospitality system has embedded within it, notably redundancy, high transaction costs and asymmetries of regulation impeding innovation and destination competitiveness, including innovation in the traditional tourism system that most managers have not addressed (Dredge & Gyimóthy, 2015). Airbnb has experienced rapid growth as a result of increasing consumer acceptance of peer-to-peer sharing through technology. This has led to guests building trust about the host and listings which provide information on location, pictures for selection purposes and opportunities for review of experiences including review of host profiles (Kathan et al., 2016). Airbnb operations are said to exist in 81 000 cities and in 191 countries worldwide [Ghana inclusive] (Airbnb, 2018; Zumost et al., 2018). The Greater Accra region is said to host over 300 facility listings in the nation's capital alone (Airbnb, 2018) and as such, the economic impact as a result of Airbnb activities is considerable. A survey conducted between 2012 and 2015 in London on Airbnb properties listed against traditional hotels indicated that Airbnb host properties in the city of London alone outnumbered the traditional hotels, even though the hotels outnumbered the rooms provided by the Airbnb properties, making the hotels suitable for group tours (Quattrone et al., 2016). This has made Airbnb facilities a significant force in the accommodation industry, and thus a potential threat to the traditional hoteliers. While the Airbnb concept is considered an excellent economic venture for hosts, questions may not only be asked about Airbnb potentially disrupting the traditional accommodation sector which requires permits and/or licenses for operations, but also the question of their legality arises when it comes to taxation. With Ghana facing challenges of establishing measures of tax retrieval with a reported 1.5 million out of six million potential individual taxpayers formally registered with the Ghana Revenue Authority [GRA] (Government of Ghana, 2020), this viable potential source of taxpayers (Airbnb operators) will surely be missing from the national income, which is significant for the country's development purposes.

Airbnb as an alternative to traditional hotel accommodation

To book a place of your choice, like a home, at your own pace and convenience even before you travel is one reason the guest is said to prefer Airbnb. Proximity to the tourist destination of the place of stay is another reason since tourists will have less stress getting to tourist sites and have more time to spend at the destinations. The added advantage of direct interactions with the locals and in a few cases the issue of guest privacy are several reasons why tourists prefer Airbnb to the traditional hotel systems (Stors & Kagermeier, 2015). Frochot and Batat (2013) add that tourists increasingly seek emotional experiences when they are travelling to alternative destinations, choosing properties to stay and that engage them on a personal level to indulge in the experiential aspects of consumption. Interaction between hosts and guests as part of the visitor experience also counted, as tourists, especially those who are leisure-oriented, have indicated Airbnb facilities gave them some information about the city, the host's favourite sites to visit, and more. From the hosts' observation, another factor that motivates tourists to use a shared facility is that visitors greatly appreciated the individuality of the facilities and design of the accommodation compared to traditional hotels (Stors & Kagermeier, 2015).

The peer-to-peer accommodation providers have thus emerged as significant competitors with the hotel industry. In particular, the fast growth and popularity of Airbnb has fuelled some discussion in both industry and academia about the impacts of Airbnb offerings on the traditional hotel market. Airbnb has economically affected the city and households since its inception (Llop, 2017). In cities such as San Francisco (USA) and Barcelona (Spain), where Airbnb was already common in 2014, close to 2.7 million tourist dwellings were provided by Airbnb, which is almost twice the number of lodgings offered by the traditional hotels (Airbnb, 2018). In addition to the positive economic impact on the city and households, this phenomenon has also brought some negative effects in Spain as a whole where 66.5% of the population live in flats (the highest among EU member states) and which are normally organised as condominiums.

The disruptive innovation theory

The theory underpinning this study is the disruptive innovation theory. This theory was proposed by Clayton Christensen in 1997 and helps shed light on how incumbent businesses are disrupted by smaller entrants in the business market environment (Christensen & Raynor, 2013). The theory suggests that the advantage that new entrants have is that they do not necessarily have to produce a new product or offer a new service to compete with existing competitors in the market. According to the theory, before the new entrant can forge ahead in the market, it takes advantage of either one or all of the four main elements neglected by the existing businesses, often using very few resources (Christensen, 1997). The entry into the hospitality industry by Airbnb has been a reason for some major firms in the tourism and hospitality industry to react and draw up tactics and strategies to gain competitive advantages rather than focusing on developing the existing traditional hotel businesses. This usually happens when all the incumbent business efforts are geared towards developing products or services that suit the existing most profitable customer, neglecting the needs of those at the lower edge of the market, and therefore giving new entrants an opportunity to concentrate on a neglected segment of the market by meeting their needs at a cheaper cost compared to the current business offer. The existing firms usually are reluctant to respond to the new entrant and continue to pay attention to their major profitable market segments, thereby giving the new entrant enough time to eventually move up-market, extending solutions that appeal to the existing business's main customers. At this juncture, disruption occurs. The tourism industry across the world is currently battling with the disruption by the shared economy's two major leaders (Uber and Airbnb) in the industry (Juho & Iis, 2017).

The disruptive innovation theory therefore suits this study because it clarifies how new entrants are able to make inroads into the market of an established business. The entrant gets going by first focusing on the new market of non-consumers. After gaining ground, it gradually becomes appealing to the existing business's "mainstream" customers, some of whom will switch and then begin to accept it and enjoy its low price offerings. It is vital to emphasise that not every new entrant is a disruption and not every fast-growing disruption will have an impact on the incumbent's business over time since some disruptions can be a sustainable innovation, like Uber (Christensen & Raynor, 2013).

Methodology

Study area

The study area is the Accra Metropolis, the capital city of Ghana. Accra has most of the 3- to 5-star-rated hotels in the country (Akyeampong, 2007). These hotels host most of the conferences and conventions as they are well equipped to handle business transactions, workshops and seminars (Akyeampong, 2007). Accra also has the highest listings of Airbnb, with 482 host listings. According to the review ratings on the Airbnb website, it has been rated 4.6 stars, with host ratings as high as "super hosts". Ghana, according to the Airbnb website, during its first week-long Africa Travel Summit in September 2018 is ranked the second-highest in West Africa after Nigeria (Airbnb, 2018). The largest international airport in Ghana (Kotoka International Airport) is located in Accra and serves as gateway for both local and international tourists travelling in and out of the country. As the capital city, Accra hosts the seat of government and the Jubilee House (presidential office and residence), parliament house, diplomatic missions, most of the government ministries and agencies and head offices of most businesses and organisations, including the largest malls in the country. The Metropolis is made up of many towns and cities.

Study population

The Greater Accra region has 623 licensed hotel facilities (Ghana Tourism Authority [GTA], 2017), with 145 of them located in the seven selected study areas. The study covered all 74 licensed hotels located in the catchment area of the Accra Metropolitan assembly. The respondents in this study were managers of hotels located in the selected areas. In the catchment area of the study, there were over 50 listings of Airbnb facilities. The reason for selecting these areas was because hotels located in these areas were more likely to be affected by Airbnb operations and the hoteliers would have gained some experiences with the operations of Airbnb facilities and so were thought to have relevant knowledge on the operations of Airbnb services. They equally would have some perceptions on Airbnb operations, thus making hotel managers suitable participants for this study. Table 1 shows the various hotel ratings totalling 74 in the study area, some of whose managers were contacted.

The study employed the purposive sampling technique, which is a strategy employed to deliberately select persons or events to provide important information that cannot be obtained from other sources (Taherdoost, 2016). A total of 35 hotel managers were sampled out of the 74 licensed hotels. Hotels that were located within a radius of 10 kilometres to and from the Kotoka International Airport and spanning all hotel ratings were chosen for the study. Other parameters included selecting managers

TABLE 1: Hotel ratings and their listings with the Ghana Tourism Authority

Hotel rating	Number of hotels
4-star	1
3-star	6
2-star	23
1-star	17
Guest house	18
Budget	9
Total number of hotels	74

Source: GTA (2017)

based on their length of stay in managerial positions, knowledge of Airbnb and sufficient work experience in the field of hotel management regarding the research subject (Freedman et al., 2007). With purposive sampling, sample sizes may or may not be fixed prior to data collection and, for the purpose of this study, the sample size was determined on the basis of theoretical saturation, which is the point in data collection when new data no longer brings additional insights to the research questions posed (Creswell, 2014).

Instrumentation

For the purpose of the study, standardised open-ended interview guides were prepared for conducting the in-depth interviews. In this situation, the researchers posed questions, allowing all interviewees to contribute as much detailed information as they desired, followed by probing questions as a follow-up (Turner, 2010). In some cases, telephone interviews were conducted since the managers were not available on the scheduled date of the interview. The interview covered five sections, from manager's demographics, hotel's visibility online, hotel managers' awareness levels of the new competitor and hotel managers' perceptions of Airbnb being a competitor in the wake of the arrival of Airbnb in the hospitality space.

The data collection steps included visiting the facility in person to meet with the managers themselves to interview them, and in a few cases calling the hotel managers to make our intentions known and arrange dates and times for a telephone interview so that they could make time for the engagement. Once the date and time were set for the telephone call, the conversation was recorded with permission from the interviewee directly using the phone and noting down key points alongside the telephone recording. After each successful telephone interview, the recording was labelled and copied onto a computer for safe keeping and duplication. The data was collected specifically where the hotels are located, notably East Legon, airport area, Osu, La, Tesano and Achimota.

The transcription of the data done manually. NVivo, which is a software tool that supports qualitative data analysis, was employed. It is rigorous and systematic analysis software that is employed using structured and unstructured data. It also handles many data types like Excel spreadsheets, audio, video, PDFs and more. NVivo also gives an advance analysis of the data and gives you a visual outcome in the form of basic diagrams and maps for word frequency, and text search to help the researchers best read and do interpretation of the results. NVivo enables the creation of nodes and coding of the data and for this reason and for the purpose of this study, NVivo was used to analyse the transcribed data.

Results and discussion

Fifty-seven hotel managers were contacted. Of these, 33 indicated awareness of the operations of Airbnb facilities in the study area. The level of awareness was one of the key constructs for which this study was conducted. Male hotel managers constituted 64 per cent (n = 21) while female managers constituted 36 per cent (n = 12) of the sample, suggesting that management of the hospitality sector is gender biased. The majority (n = 15, 45.4%) of the managers were in the age range of 41 to 50 years old. The rest of the demographic information is summarised in Table 2.

TABLE 2: Sociodemographic data of respondents

Characteristic	Frequency (n)	Per cent (%)
Sex		
Male	21	64.0
Female	12	36.0
Age (in years)		
25–28	2	6.1
30–40	7	21.2
41–50	15	45.4
51–60	9	27.3
Work experience		
5 years & below	2	6.1
6–10	11	33.3
11–20	13	39.4
21 & above	7	21.2
Education		
Undergraduate	2	6.0
Masters	31	94.0
Hotel online visibility		
Yes	27	82.0
No	6	18.0
Ownership of website		
Yes	18	55.0
No	15	45.0
Hotel type		
High grade (3 & 4 star)	7	21.0
Medium grade (1 & 2 star)	18	55.0
Lower grade (guesthouses & budget hotels)	8	24.0

Level of awareness by hotel managers of Airbnb operations in the metropolis

One group (n = 24, 42.11%) were not further interviewed after admitting to not being aware of Airbnb operations and had just heard of it for the first time from the research team. Despite the global existence of Airbnb operations for 13 years and six years in Ghana as at the time of the study, one of the managers made this remark:

> *I have never heard of something like Airbnb, an online platform allowing people to share their surplus home space and guests also risking to stay with or without hosts. I am hearing it for the first time from you and will have to gather more information on them* (Budget hotel manager, 54 years old and six years in management position).

Another manager also commented as follows:

> *Ah, you mean the people allow strangers into their homes in the name of selling surplus space to make extra cash? Is the Ghana Tourism Authority aware? Are they registered? For me, I cannot accept a stranger for any amount of dollars* (Guesthouse manager, 39 years old and three years in management position).

One other manager relayed this information below:

> *So you wake up one morning to realise your stranger is dead, how will you handle it? How will you contact the family or that the person has an underlying condition and gets an attack while in your house. This thing cannot just be safe* (1-star hotel manager, 45 years old and eight years in management position).

A majority (n = 20, 83.33%) of the managers who were not familiar with Airbnb operations in the metropolis were from the

lower grade hotels, specifically the budget hotels, guesthouses and 1-star rated hotel category. This seems to explain why the lower grade hotels were the most affected by the operations of Airbnb due to their manager's lack of awareness and readiness to compete with Airbnb in the ever-changing hospitality market (Guttentag, 2015). This scenario is further reiterated by Brown and Kaewkitipong (2009) who asserted that small hotels often did not have the expertise required to take complete advantage of the internet and follow technological trends, allowing Airbnb hosts and their operations to overshadow the hotel businesses. Again, many of the lower category of hotels were "self-owned", with managers who were mostly 50 years old and above and this suggests why they might be less enthusiastic or not abreast with technology and current trends in internet-based hospitality avenues like Airbnb in the metropolis.

Regarding hotel managers who were aware of Airbnb operations in the metropolis, their responses were coded into themes. Themes generated based on managers' awareness of the Airbnb operations were classified into distinctiveness, "misgovernance" and tax evasion facilities.

Distinctiveness

The empirical literature on Airbnb over the years has identified some specific attributes of Airbnb that distinguish them from the typical characteristics of the hotel sector (Dolnicar, 2018). These attributes (Table 3) are said to influence the purchasing decisions of consumers. Some of the managers trying to define Airbnb on their own mentioned location, shared space, lower price ranges, authentic experience and online reviews as attributes that define or showcase Airbnb as facilities that offer unique services to attract guests, hence increasing consumer acceptance. A guesthouse manager who laid an emphasis on shared space and availability of technology explained what Airbnb entailed as follows:

> *Airbnb is a website where people book rooms to stay with a host they do not know from anywhere because it is cheaper than staying in a hotel. Thanks to technology. There is no cost accruing to selling your rooms on Airbnb as compared to the cost of operating as hotels* (Guesthouse manager, 40 years old, with four years' experience in management position).

Another manager describes Airbnb as:

> *It is an app that allows anyone including some hoteliers to buy or sell out surplus space for short-term stays across the world* (1-star hotel manager, 52 years old, with seven years' experience in management position).

Another manager also opined as follows:

> *Airbnb facilities are usually located within the community and around tourist destinations. So the tourist prefers to stay there, depending on the price and space available. Sometimes too, the "foreigners" want to mingle with the local people and live like them, hence their preference for Airbnb to the hotels* (3-star hotel manager, 52 years old, with 11 years' experience in management position).

TABLE 3: Themes generated based on awareness levels

Theme	Frequency
Distinctiveness	19
"Misgovernance"	24
Tax evasion facilities	17

The statements of these managers have portrayed the attributes of Airbnb and their operations well. These responses seem to be in tandem with the findings of Dolnicar and Otter (2003) who identified several essential attributes that influenced tourist purchasing decisions, including cleanliness, location, reputation, price, value and quality of service like room comfort and security. Their responses also capture the technology and how people make money by having strangers stay, which are both in line with the modus operandi of Airbnb operations. Airbnb describes what it does as uniquely leveraging technology to economically empower millions of people around the world to become hospitality entrepreneurs through unlocking and monetising their spaces, passions and talents (Airbnb, 2018). The statement regarding Airbnb entrepreneurs being technologically inclined corresponds with the findings of Hunter et al. (2015) who affirmed Airbnb to be an online accommodation platform aided by the use of technology and the internet.

Most managers were of the view that Airbnb appealed more to the leisure tourist, enabling them to freely select where they wanted to stay either in or away from the central business district and get to eat and stay with the locals. This seems to exemplify the theory underpinning this study which espouses that disruptive innovations will usually start by targeting the lower end of the market and with time move upmarket, appealing to mainstream customers (Christensen et al., 2007).

It is worth noting that some respondents had booked and stayed in Airbnb facilities before outside Ghana, while some managers had made reservations for friends and family in Airbnb facilities due to their homelike settings and nearness to tourist sites.

> *I am not sure the Airbnb operators are into a corporate business like we do as hoteliers. Their facilities look more like homestays and their operations are more of self-service, hence, most suitable for individuals travelling on their personal budget* (2-star hotel, 49 years old, with seven years' experience in management position).

The manager of a 4-star facility expressed his view as follows:

> *They provide something like a home setting for an individual and that of a small family on vacation. I booked a full house on their platform when my brother was coming to visit me here in Accra for about a week with his wife and kids and wished to stay alone. We never met the landlord, but the caretaker of the facility came to clean daily and left* (4-star hotel manager, 49 years old, with five years' experience in management position).

"Misgovernance"

The statements of these managers that led to the coining of the theme *misgovernance* further explains their level of awareness of Airbnb operations with regard to regulation issues. One of the managers pointed out that

> *I am not sure those people are regulated by any government regulatory bodies especially on what to provide, prohibit, safety and security issues, among others. When you check the Airbnb platform you realise the house rules are set by the landlord or host without any crosschecks and once a guest is comfortable with the rules, that's it, business is established* (2-star hotel manager, 39 years old, with six years' experience in management position).

Another added:

> *I think those people need to be regulated so as not to let the host take things into their hands and do as they wish since the country's reputation is at stake. Imagine something goes wrong with a guest who is not a Ghanaian. What happens?* (Guesthouse manager, 58 years old, with 17 years of experience in management position].

Some respondents were also of the view that it was more in the interest of government of Ghana to enact laws that will regulate and govern the activities of Airbnb, among other short-term rentals. A passionate complaint launched by one manager displayed her sentiments as follows:

> *With the number of registrants on the Airbnb page, it is clear it has come to stay in the hospitality industry for a very long time and so it will be more in the interest of the government to register and regulate the operators of Airbnb in Ghana if not for anything, but for them to pay taxes to the state* (3-star manager, 46 years old, with 12 years' experience in management position).

Another manager also shared his viewpoint:

> *Other countries I know are regulating the activities of Airbnb operations and other short-term accommodation rentals and just as we the hotels through the Ghana Tourism Authority and the Ghana Hoteliers Association are registered and licensed, Airbnb must also be registered, licensed and regulated in a way* (1-star hotel manager, 35 years old, with three years' experience in management position).

Another manager also reiterated that

> *The regulation of Airbnb is not just for the hotels, but for Ghana as a whole. Some countries have benefited enormously from the regulation of Airbnb. Ghana can also benefit if they are properly registered and regulated* (4-star hotel manager, 52 years old, with 11 years of experience in management position).

These revelations from the hoteliers further underline the findings of Guttentag (2018), who reported that many countries have made efforts aimed at enacting laws to regulate short-term rentals. Cases in point include Paris, Berlin, Tokyo, Palma, Singapore and San Francisco who have enacted laws to regulate the activities of short-term rentals including Airbnb. The situation in the Ghanaian business space where the operators of Airbnb facilities are not regulated is of concern considering the huge number of listing of facilities on the platform and it is only proper that their activities should be regulated.

Tax evasion

The comments elicited from respondents led to the formulation of the theme "tax evasion facilities" which portrays that this group of managers was fully aware of how Airbnb facilities operated. Respondents lamented how Airbnb hosts were not paying any taxes as these "smart entrepreneurs" who had enough rooms and facilities and could have registered as hotels with the GTA, but "clandestinely" registered as Airbnb hosts to evade the payment of taxes to government. The respondents pointed out that the government of Ghana would make enough revenue from taxes collected from the "hundreds" listed on the Airbnb website to let them also contribute their quota towards national development. A few respondents shared similar sentiments on tax evasion as follows:

> *It's a good thing to see people listing on the Airbnb platform every minute because it's free with no stress, no renewal of licenses, you can drop out without any cost attached, no employee salaries to cater for, domestic utility bills for commercial purpose and most seriously, the non-payment of taxes like we grapple with value added tax (VAT) and the National Health Insurance Scheme levy (NHIS) as hoteliers* (Guesthouse manager, 27 years old, with two years' experience in management position).

A 2-star hotel manager also stated as follows:

> *Some of the facilities listed on Airbnb are big enough to even register as hotels. They are even bigger than some budget hotels and others look the same size as ours. These owners are hiding behind Airbnb to have less cost of everything from utility bills to zero tax payments* (2-star hotel manager, 44 years old, six years' experience in management position).

A 3-star accommodation facility manager also stated as follows:

> *I think there must be a way to let those people pay taxes for they have enjoyed lots of freebies including "tax holiday" for far too long* (3-star hotel manager, 58 years old, with 14 years in management position).

These assertions have been found to be in line with the findings of Nieuwland and van Melik (2020) whose study reports on how municipalities are struggling to regulate Airbnb in Europe and America and reiterates the fact that in many countries, city officials are looking at possible ways of regulating Airbnb operations for occupancy taxes.

Perspectives on Airbnb being in competition with the traditional hotel operators in Ghana

In the explanations of managers which came from 27 hotel managers, it was indicated that they saw no form of competition between Airbnb and the hotels, compelling them to reduce prices or experience a fall in growth in guest arrivals with the resultant adverse effects of low room occupancy, and most obnoxiously, a fall in hotel revenue mainly due to Airbnb operations. Six respondents, however, alluded to some form of competition emanating from Airbnb facilities with the traditional hotels in the metropolis.

> *I do not see Airbnb as a competitor in the hotel business because what they do doesn't affect my business, especially my sales. My revenue has been OK and has not fallen to Airbnb. They have their way of reaching their market and we have ours* (4-star hotel manager, 44 years old, with seven years of work experience).

Another shared his opinion as follows:

> *I think their primary product is accommodation just as it is our signature product and so if there is any competition, then we should feel it in our room occupancy rate falling. But for me, I have not had any drop in room occupancy rates not to talk of it being related to Airbnb operations. So for me, there is no competition at all. I believe both businesses encourage each other to work harder* (2-star hotel manager, 49 years old, with six years' work experience).

Another manager also opined:

> *Well, the people who come to my hotel still continue to come and I even get some new customers as well.*

> *I am not sure Airbnb is taking my customers even though I know they are growing faster in Ghana. I do not count the operators of Airbnb as my competitors at all* (Budget hotel manager, 59 years old, 13 years' work experience).

From the responses of these managers, they saw no direct impact of Airbnb operations on hotel operations, and this seems to agree with the finding of Guttentag (2015) about the limited impact of Airbnb operations on hotels due to their unique attributes of appealing to younger, technologically savvy, adventurous and budget-conscious tourists who perhaps would not use the traditional hotels. Euromonitor International (2013) predicted that business travellers will always remain loyal to hotels because of corporate travel policies and standardised services, while Airbnb only creates limited impact with a focus on leisure travellers. The responses from the respondents affirm the findings of Hernández-Méndez et al. (2015) in their study of the impact of Airbnb on Singapore's budget hotels in which they found that managers being interviewed did not view Airbnb as a direct or primary competitor.

However, six managers (one guesthouse, two 1-star hotels, two 2-star hotels and one 3-star hotel) shared completely different views from the majority (n = 27), admitting there was some form of competition even though at a very low pace and that to some extent has called on hotels to worry about the operations of Airbnb. They added that with the continuous growth in guest arrivals and current facilities available through Airbnb, it poses a threat to hotel businesses now and in the future.

One respondent stated as follows:

> *Usually, when it comes to these sharing economies as they call it, their success or failure depends on the level of acceptance by the targeted group or the market. The last time I checked on the page you could see the number of listings had increased regionally across the country and that tells you the level of acceptance is higher and so could have implications now and even in the future if the growth continues on that trajectory* (2-star hotel manager, 42 years old, six years in management position).

Another added:

> *Well, for now, I do not see or feel any competition between us as hoteliers and the Airbnb operators... but then, in the future they will be a serious force to reckon with, and we should worry about our businesses* (budget hotel manager, 42 years old, with six years' work experience).

Another manager also contributed as follows:

> *I see Airbnb as an ambush on the hotel business now and that with time, it will cause some problems in the hotel business if nothing is done early as it is cheaper and easy to own and run, making it easy for them to compete with us as is happening now* (3-star hotel manager, 57 years old, with 13 years' work experience).

In a study highlighting the limitations of Airbnb in a blog post, it came to the fore that Airbnb only poses a small or minimal threat to the hotel industry. This was no different from the reports of the few hotel managers who disagreed with the "no complete impact" mantra of Airbnb on the traditional hotel industry (Mody & Gomez, 2018). This statement again expresses the same opinion as Koh and King (2017), who in similar research earlier with hotels and hostels in Singapore found that Airbnb was a direct competitor now and a potential competitor to reckon with in the future. This again supports the tenets found in the disruptive innovation theory where the competitor will usually start in a low-key fashion by targeting the lower market clientele of bigger businesses and with time move upmarket, appealing to mainstream customers of traditional businesses (Christensen et al., 2007).

Conclusion and recommendations

A section of hotel managers in the Accra Metropolis are aware of Airbnb operations in their vicinity, though it also came to the fore that a few hoteliers had never heard of them. Hoteliers again alluded to the fact that these facilities, which are listed worldwide and in Ghana, are on the increase. Respondents raised concerns about the unregulated nature of these facilities and revealed that many entrepreneurs deliberately enlisted their facilities freely on the website because it came at no expense, while due to their unregulated nature, their businesses did not fall under the tax net of the country. Respondents, however, were of the conviction that their activities and operations did not pose threats to their business though respondents from other hotels of the lower grades (guesthouses, budget hotels and 1-star rated hotels) saw it otherwise (as competitors). They believed that the general hotel business industry needed to worry about their operations because in the not-too-distant future, their impact on traditional hotels' revenue bases would be felt from the loss of clientele to these technologically savvy entrepreneurs (Airbnb operators) and their businesses.

The study therefore recommends that the Ministry of Tourism, Arts and Culture (MoTAC) should mandate the GTA to begin putting in measures aimed at licensing their operations and also open them up for inspection and some form of rating of their facilities. The Ghana Revenue Authority also needed to come in and cast their tax net wider to cover these operations and rake in more revenue for the state. Airbnb operators in the country needed to act regularly and diligently on reviews and recommendations made by their clientele. This will enable them to deliver the expected quality needed which will foster their businesses. It is also recommended that the GTA should make it mandatory for hoteliers in the country to recruit staff with the needed expertise from hospitality training institutions as this will also boost the sector to be able to render quality services to guests hosted by their facilities to give guests good impressions about Ghana.

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The case of Lovina, Bali: how dolphin-watching procedures put village hospitality revenue at risk

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ABSTRACT: This article focuses on the current practice of dolphin watching in Lovina, Bali. The current approach, in which tourists can hire a traditional boat with a captain, has been evaluated. The results show that the anthropogenic disturbance caused by dolphin watching in Lovina is severe. The future of the dolphin-watching industry and the dolphin population, though habituated, is at risk, creating a threat for the tourism and hospitality industry of Lovina. The triple bottom line framework of Cavagnaro and Curiel provided a theoretical framework for recommendations that are focused on a balance between "care for you and me". The "you" in this point of view is the local spinner dolphin (*Stenella longirostris*) population, where the organisational focus on people, leading to social value, a balance between environmental and economic values can be made, leading to a humanitarian, sustainable form of dolphin watching. Recommendations include the need for a sufficient code of conduct for dolphin watching, control of this code of conduct (including sanctions), restriction of the daily fleet and increasing the boatmen's caring capacity. When the number of dolphin-watching boats remains low and an economic incentive can be reached for captains to undertake dolphin watching less frequently, a more sustainable model for the future of tourism and hospitality in Lovina can be shaped. The current low number of tourists due to the COVID-19 pandemic can create a window of opportunity to create change.

KEYWORDS: conservation, spinner dolphin, sustainability, wildlife tourism

Introduction

This article focuses on the dolphin-watching practices in Lovina, in the north of Bali, a fisherman's village attracting visitors since the 1980s to see dolphins in the wild (Figure 1). Dolphin watching is a good alternative to the cruel captive industry, as confirmed by Bejder et al. (2006), who notes that cetacean watching in many cases is seen as a way to save a species from direct exploitation. Therefore, encounter management needs to be at a high level to keep tourists' satisfaction levels high. Since the Dutch colonial era, Bali (Indonesia) has attracted tourists with to its unique culture, lush beaches, high-end resorts and welcoming people. The village of Lovina, not offering much more than dolphin watching, became a tourist destination with numerous hotels, restaurants, shops and tour guides benefitting from the dolphin-watching industry, with (as claimed by Mustika, 2011) USD 4.5 million[1] in annual auxiliary direct expenditures.

Based on her research, Mustika et al. (2012) concluded that the area attracts at least 37 000 overnight visitors per annum (~60% of the region's overnights tourists). Van Egmond (2007) and the WTO (2004) both confirm that tourism can be considered as a tool to alleviate poverty in developing countries, which makes the case of Lovina remarkable regarding relieving poverty and subsequently evaluating sustainable practices for the future to be able to keep alleviating poverty with responsible procedures. Mustika et al. (2012) described the discrepancy between the knowledge of the importance of whale and dolphin watching tourism for the progress of a developing country and the actual little that is known about the distribution of money that flows into the developing local communities that depend on whale and dolphin watching tourism. The scarcity of tourists during the global COVID-19 pandemic compared to recent years pre-COVID-19 does show a possible scenario and impact if the dolphin-watching industry ceased to exist in Lovina, either due to changes in the dolphin population from the current dolphin watching practices or from enforced regulations for dolphin watching currently being developed as a response to the current dolphin watching practices.

The first author of this article focuses on the "people" dimension of sustainability and its roots in altruism, with a specific focus on human and children's rights and animal rights. Prior to this study, he published his PhD research (Westerlaken, 2020) and several articles (Westerlaken, 2021a; 2021b) on orphanage tourism. This article is based on a study as part of Westerlaken's second master's degree in the Faculty of Environmental Studies at Udayana University in Indonesia.

FIGURE 1: Research area (insert shows the island of Bali) (latitude −8.184042 to −8.111815 and longitude 114.912608 to 115.082802), based on 18 173 geotags, created with ArcGIS oceans.

Literature review

Bali's waters have a rich marine environment, specifically for marine mammals such as whales, dolphins, and dugongs (Mustika & Ratha, 2011). One-third of all known cetaceans worldwide and one species of Sirenian reside in Indonesian waters (Wiadnyana et al., 2004). Dolphin watching was first established in the late 1980s in Lovina and has become an important livelihood for the locals (Mustika, 2014; Mustika et al., 2012; Mustika et al., 2013; Mustika et al., 2015; O'Connor et al., 2009). This timeline aligns with global developments of animal use in tourism, as mentioned by Kline (2021). Lovina was the first location in Indonesia to establish cetacean watching (Mustika et al., 2013). The dolphin-watching business expanded rapidly in the 1990s (Hoyt, 2001). However, other examples can now be found in the archipelago, making the need for an Indonesian code of conduct for whale and dolphin watching even more critical. Heenehan et al. (2017) noted that it is likely not the magnitude of the activity, but the focus that matters, meaning that a small number of boatmen showing behaviour of concern could influence the dolphin-watching experience of many.

In 2011, almost 200 dedicated traditional boats (*jukung*) were accessible for tourists to see dolphins in Lovina's waters. The boatmen take tourists around three to four kilometres offshore in the early morning to encounter dolphins (Mustika, 2011; Mustika, 2014; Wiadnyana et al., 2004). Mustika recognised that the boatmen enjoyed an above-average income due to their dolphin-watching activities (Mustika, 2011; Mustika et al., 2012). Mustika (2011) identified that a single school of dolphins has the potential to be surrounded by 83 of these traditional fishing vessels at any one time (Mustika, 2014).

Concern about dolphin watching in Lovina is not new. In 2001, Hoyt claimed that most tourists who go on a dolphin-watching trip are international tourists. Hoyt (2001, p. 118) assessed the dolphin-watching practices in Bali in 2001 as

> [c]onsiderable to outstanding potential in North and South Bali, yet the number of boats on the water at Lovina in North Bali and the consistently aggressive approaches towards the dolphins requires urgent attention and precautionary management, if the future presence of the dolphins is to be ensured. Considerable value could be added to those trips, with more repeat business, by offering naturalist guides and commentary.

These observations by Hoyt are underlined by Mustika et al. (2012, p. 12), who identify the two major concerns of tourists:

1. The excessive number of boats participating in the dolphin trips; and
2. Boatmen behaviour ("behaviours of concern") that tourists perceived as unsustainable.

Mustika et al. (2012) further describe economic sustainability concerns that may threaten the future of whale and dolphin watching in Lovina. These concerns focused on changes in the dolphin population due to the dolphin-watching practices or due to enforced regulations for dolphin watching. In the research by Mustika (2011), 354 tourists of Western and Asian nationalities were questioned about their dolphin-watching experience. The satisfaction of Western tourists revolved around encounter management, the number of dolphins seen and the preferred number of boats. Mustika identified that Asian tourist satisfaction mainly revolved around encounter management. Mustika subsequently confirmed that Western tourists were concerned with what they perceived as mismanagement of the dolphin-watching vessels, which was explained as the tendency of boatmen to drive their boats at a certain speed and to surround the dolphins with a large number of boats. Mustika et al. (2012) conclude that the satisfaction level of Western tourists was higher when their preferred number of surrounding vessels was ten or less. More than 80% of Western tourists preferred a maximum of ten boats in a trip.

Mustika notes that experts on dolphin behaviour are becoming increasingly vocal about the need to regulate whale and dolphin watching (Mustika et al., 2013; Mustika et al., 2015). Kline (2021) describes a shift of perspective from an anthropogenic viewpoint to a bio-centric or animal-centric perspective, advocating for more justice for exploitation and commodification. Kline describes the possibility of resetting procedures due to the

current COVID-19 pandemic and the need to re-evaluate and act, for which this study can give a basis of knowledge. Kline further describes species justice, which illustrates that animals should receive fair treatment by humans.

Regarding animal rights, Donaldson and Kymlicka (2011) provide an essential notion on this related to the Lovina case: animal rights are not regarded as absolute non-intervention, but rather as honouring the positive duties to, in this case, dolphins. Kline promotes humanitarian tourism based on ethics of care, social humanities, prescribed relational responsibility, affective solidarity and humanitarian advocacy. Animals should not be a resource and commodified for profitmaking in humanitarian tourism. The links between wildlife conservation and tourism benefits must be strong, visible and constantly met. Kline describes the need for a code of conduct to monitor justice and avoid exploitation and commodification. Mustika (2011) identified that examination of the boatmen's conduct indicated that the operations in Lovina did not conform to accepted international norms as laid down in much legislations and many codes of conduct worldwide. Mustika (2011, p. xvi) saw opportunities for "the Lovina dolphin watching industry to become the exemplar of community-based tourism in a developing country that is successfully co-managed from different perspectives". Mustika (2011, p. xv) concludes that as a consequence of the economic importance of this industry to the boatmen and the villages, it is important that the boatmen improve their dolphin encounter management to meet the expectations of the highly educated international visitors.

The fact that dolphins are the main attraction for tourists to visit Lovina means that the practice directly affects the villagers' revenue, heavily dependent on tourism and hospitality due to the availability of dolphins, since fishing activities around the reefs and bottom net operations are no longer allowed (Prawiti & Dewi, 2020; Wiadnyana et al., 2004). Mustika et al. (2013) further show that in Mustika's research, on average, the maximum number of tourist vessels per day was 34.5 (SE $\pm$ 6.29; range 4–98 vessels), or 19% of the total tourist fleet capacity.

Because dolphin-watching tourism is lucrative for boatmen and the wage earned is above regional income levels, it is unlikely that the boatmen will leave the industry voluntarily. On the contrary, the high net benefit is likely to attract more people to become a boatman (Mustika, 2011; Mustika et al., 2012).

A restricted daily fleet could benefit the dolphins involved, but should have economic incentives for the boatmen. When asked, boatmen agreed that an average of 13.6 boats (SD $\pm$ 7.6, range 5–30, $n = 9$) was considered comfortable (Mustika, 2011).

Mustika (2011, p. 84) notes that:

> The large encounter fleet size, short approach distances and the high incidence of boats showing "behaviours of concern" may contribute to the high levels of travelling of the spinner dolphins off the coast of Lovina and thus are a potential concern.

Mustika notes that she failed to detect a significant correlation between the dolphin-watching boats and the short-term responses of the spinner dolphins. She determines that this might reflect the absence of an effect; however, she also notes that the lack of a significant relationship between anthropogenic disturbance and responses does not warrant an assumption that the animals are not disturbed (Mustika, 2011). Mustika resumes identifying that the spinner dolphin population in Lovina might be habituated, in other words, taught by their mothers to use the waters of Lovina and not to search for potential replacement sites notwithstanding acoustic, anthropogenic activities. Mustika argues that habituated species might not be the fittest due to adapting and living in one region. They have nowhere else to go or are unaware of alternative spaces. Without another place to go or knowledge of other areas, the population might choose to stay, even if that influences their reproductive rate or survival, therefore threatening their long-term survival.

Theoretical framework

The theoretical framework used for this research, with the objective of offering recommendations toward a more sustainable way of dolphin watching in Lovina, has been the triple-bottom-line framework developed by Cavagnaro and Curiel (2012). This framework divides a sustainable society into three different values, environmental value (the conservation of the local spinner dolphin population), economic value (the income for the boatman offering dolphin watching) and social value (the satisfaction of tourists, the outcome of the balance between environmental and economic value). A sustainable organisation is defined as the goal for the recommendations resulting from this research. Leadership in a sustainable organisation is paramount. When the value for leadership is "care for me", the organisational focus is profit, which leads to economic value only. When the value for leadership is "care for all", the organisational focus is on the planet, which leads to environmental value only, which is not considered sustainable. The Lovina economy is in danger of losing about 5.5 million USD (adjusted inflation) in annual auxiliary direct expenditures. When leadership is focused on a balance between "care for you and me", the organisational focus should be on people, leading to social value, balancing environmental and economic values (Cavagnaro & Curiel, 2012).

Study findings

The primary study on which this article is based focused on anthropogenic disturbance caused by boatmen in the Lovina area. The results of this study can lead to a broader understanding and interpretation of the possible impact on the tourism and hospitality industry. It is essential to understand the bigger picture of the complete study.

For the main study, seven hypotheses were defined:

- H_1: Distance between boat and dolphin is not adhering to a 50 metre standard.
- H_2: Distance between boat and boat is small, leading to escape behaviour.
- H_3: The behaviour of boatmen leads to situations of concern.
- H_4: The behaviour of dolphins deviates from normal behaviour due to dolphin watching.
- H_5: Intensity of sound increases when the number of boats undertaking dolphin watching increases.
- H_6: Frequency of sound increases when the number of boats undertaking dolphin watching increases.
- H_7: The combination of distances between boat and dolphin, boat and boat, boatmen behaviour, dolphin behaviour and the intensity and frequency of sound leads to an unsustainable situation.

Based on the main research, it is concluded that H_1, H_2, H_3, and H_4 are considered proven, H_5 and H_6 to be inconclusive, and H_7 partially proven.

The current pandemic shows a decline in the number of people undertaking dolphin-watching activities compared to pre-pandemic conditions. However, the daily number of boats undertaking dolphin watching is not recorded by any agency or government institution. Between 9 January 2021 and 15 May 2021, the number of boats per day going dolphin watching (mean 15.5, ranging from 0 to 47 vessels, or 8.5% of the tourist fleet capacity as per Mustika, 2011) can be seen in Table 1. For reference, Mustika (2011) identified in her research that, on average, the maximum number of tourist vessels per day was 34.5 (ranging from 4 to 98 vessels), or 19% of the total tourist fleet capacity.

The Tourism Department of Buleleng regency is keeping statistics, published by the Buleleng's *Badan Pusat Statistik* (BPS Buleleng, 2014; BPS Buleleng, 2018), on tourists arrivals (Figure 2). Bali as a province is divided into nine administrative regencies (*kabupaten*), and Lovina is situated in the Buleleng regency. When comparing the numbers of tourists visiting Buleleng regency, one can see that at the time of Mustika's research numbers were in fact smaller than during the pandemic (2007–2009 average domestic tourists = 36.371, average foreign tourists = 58.278, average total = 94.650, compared to 2020–2021 average domestic tourists = 169.226, average foreign tourists = 31.248, average total: 200.654). One can see the effect of closed international borders due to the fight against the spread of COVID-19, leading to fewer foreign arrivals and more intense domestic tourism. This likely has changed the conduct for dolphin watching, as Mustika (2011) identified that Asian tourist satisfaction mainly revolved around encounter management, whereas the satisfaction of Western tourists revolved around encounter management, the number of dolphins seen and the preferred number of boats.

One should note that the regency (*kabupaten*) of Buleleng consists of nine districts (*kecamatan*), where dolphin-watching tourists predominantly stay in *kecamatan* Buleleng and *kecamatan* Banjar, covering the villages of Kaliasem and Kalibukbuk. When evaluating the impact of tourism and hospitality development in the area, only data on the number of star-rated hotels, non-star-rated hotels and *pondok wisita* (private accommodation) (Figure 3) and the number of registered employees (Figure 4) is available. *Pondok wisita* [private accommodation] is a licence often used for privately owned villas available for tourists.

TABLE 1: Dolphin watching boats per day, Lovina 2021, based on 20 days, period 9 January 2021 to 15 May 2022 (within the COVID-19 pandemic)

Date	Total number of boats
01/09/21	3
01/10/21	21
01/11/21	4
01/12/21	4
01/13/21	5
02/22/21	8
02/23/21	0
02/24/21	6
02/26/21	2
03/02/21	6
03/03/21	6
03/11/21	10
03/12/21	14
04/02/21	25
04/03/21	26
04/04/21	33
05/12/21	14
05/13/21	33
05/14/21	47
05/15/21	43
Total	20

Even though data is only available until 2017 (a total of 954 730 tourists coming to the whole Buleleng regency), a clear development of the area of *kecamatan* Buleleng and *kecamatan* Banjar in the tourism and hospitality industry can be seen.

Discussion

The primary study showed that current practices of dolphin watching in Lovina have led to anthropogenic disturbance for the population of spinner dolphins in the area. As Wiadnyana et al. (2004) note, dolphins are the main attraction for tourists visiting Lovina, which creates the situation that the practice directly affects the villagers' revenue, which is heavily dependent and tourism and hospitality due to this availability of dolphins. Therefore the development of tourism and hospitality in the Lovina area should be considered to be under threat. Data shows that over the years 2009 to 2017, the tourism and hospitality

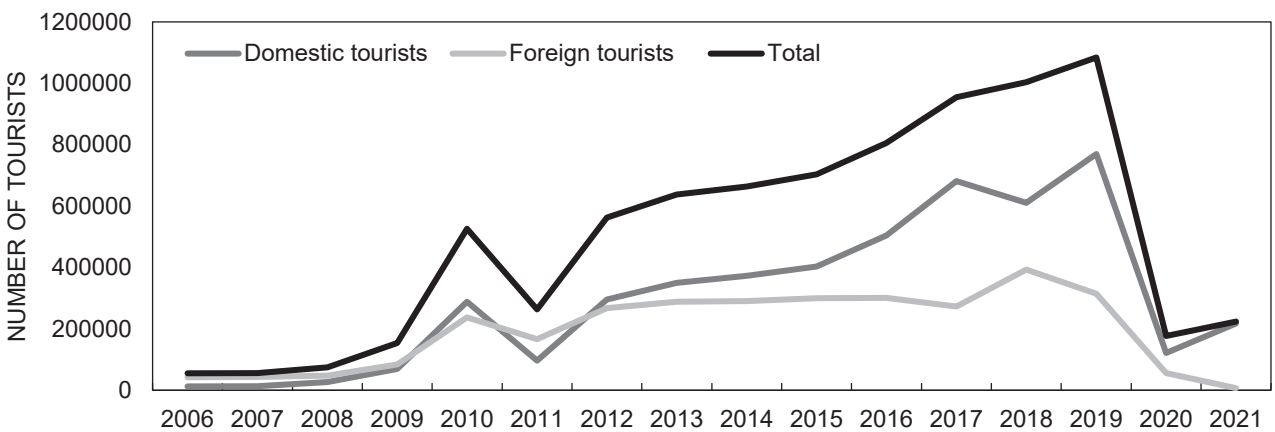

FIGURE 2: Tourist arrivals in Buleleng area, 2007–2021, based on statistics of Dinas Pariwisata *kabupaten* [administrative regency] Buleleng (BPS Buleleng, 2022)

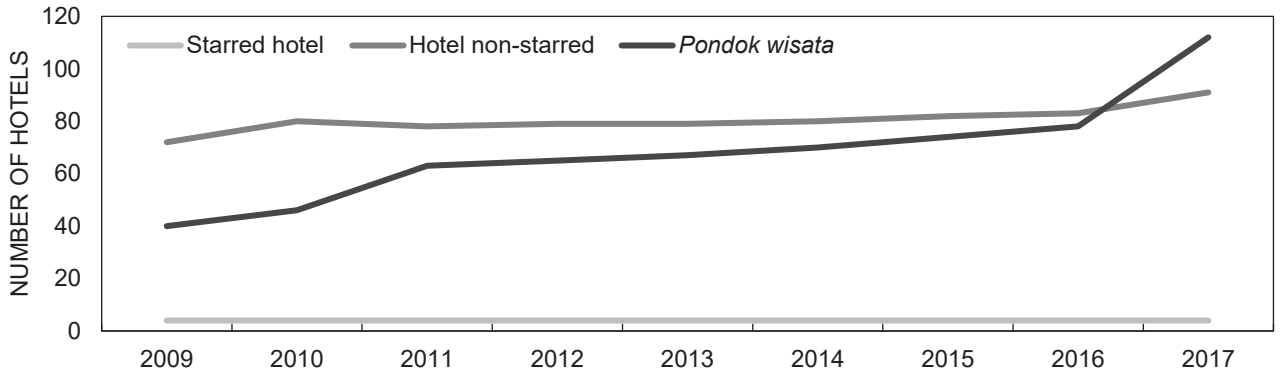

FIGURE 3: Development of starred hotels, non-starred hotels and *pondok wisata*, 2009–2017, Buleleng and Banjar districts

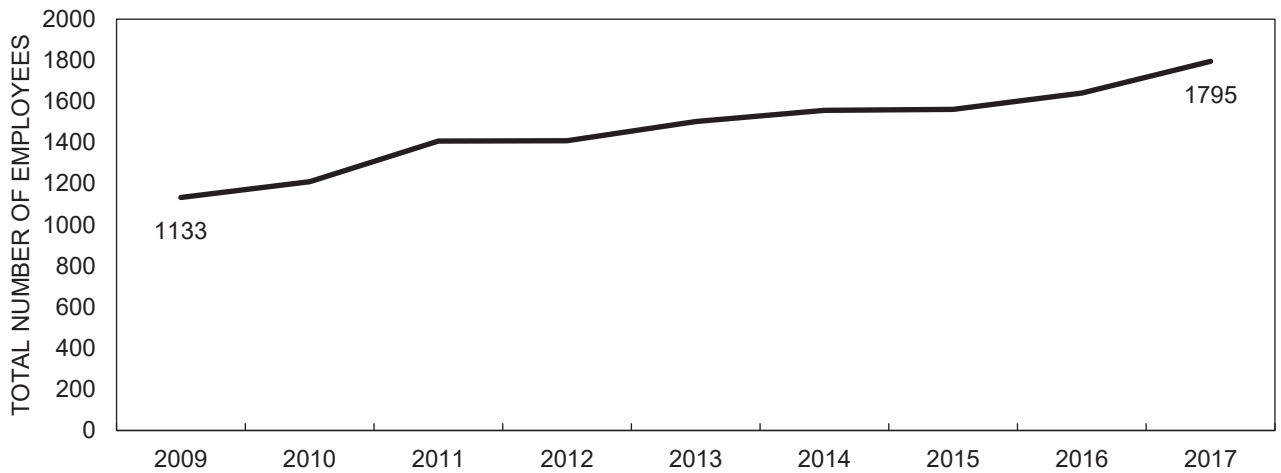

FIGURE 4: Number of employees working at starred hotels, non-starred hotels and *pondok wisata*, 2009–2017, Buleleng and Banjar districts

industry, which is dependent on the availability of dolphins in the area, has developed significantly. This study shows that the dolphin watching influenced tourism, and the hospitality industry in the area has continued to grow after Mustika's research (2011) (0% starred hotels, 16.7% non-starred hotels, 77.8% *pondok wisata*, 27.6% growth in number of employees).

The primary study on which this article is based confirmed and further defined that the conduct of the boatmen indeed leads to anthropogenic disturbance. The study's outcomes showed that the number of dolphin-watching boats during the pandemic was smaller, but anthropogenic disturbance seemed to be more severe than Mustika's conclusions. The results from Mustika cannot be compared directly to the primary study due to different methodologies, though differences in outcomes are significant, indicating an increase in and the severity of the disturbance.

Mustika et al. (2012) identified the possible scenario and impact of the possibility that the dolphin-watching industry ceased to exist in Lovina, either due to changes in the dolphin population due to the current dolphin-watching practices or due to enforced regulations for dolphin watching currently being developed as a response to these practices.

Kline (2021) described the shift of perspective from an anthropogenic viewpoint to a bio-centric or animal-centric perspective, advocating for more justice in exploitation and commodification. If dolphin watching in Lovina is done in a humanitarian and sustainable way, based on the altruistic spectrum of the triple-bottom-line framework of Cavagnaro and Curiel (2012), dolphin watching should be able to continue in the Lovina area.

Kline described the possibility of resetting procedures due to the current COVID-19 pandemic and the need to re-evaluate and act, for which this study can give a basis. Kline further describes species justice, which illustrates that animals should have fair treatment by humans. There is a lack of data on the impact of the pandemic on the area, but seeing the decline in the number of boats doing dolphin watching in the first half of 2021, the impact must be severe.

Conclusion

This article shows the importance of regulations for dolphin watching in light of economic stability for the tourism and hospitality industry in Lovina. When looking at the triple-bottom-line framework of Cavagnaro and Curiel (2012), one can conclude that when leadership is focused on a balance between "care for you and me" ("you" being the local spinner dolphin (*Stenella longirostris*) population, the organisational focus is on people,

leading to social value, a balance between environmental and economic values is made, leading to a sustainable form of dolphin watching.

It is concluded that the consequences of anthropogenic disturbance caused by dolphin watching in Lovina are severe. The future of the dolphin-watching industry and the dolphin population, though habituated, is at risk. As Heenehan et al. (2017) noted, it is likely not the magnitude of the activity, but the focus that matters. Conceivably, the outcome of this research does show the magnitude, but the focus of the issue is sharp. A clear code of conduct, with socialisation and control, is needed to create a humanitarian, sustainable way fordolphin watching in Lovina.

Recommendations

Based on the main research, and in particular this article, the following recommendations could be made:

- A sufficient code of conduct for dolphin watching in Indonesia, with specific provisions for Lovina, needs to be (re)written and awareness needs to be created among the boatmen;
- When a code of conduct is written and made socially acceptable, the code of conduct needs to be controlled;
- Boatmen behaviour that disturbs needs to be controlled and sanctioned to ensure the most minor disturbances by anthropogenic factors, resulting in the escape behaviour of dolphins;
- Level of care among boatmen needs to be increased, leading to a sustainable model of dolphin watching with the most minor disturbance by anthropogenic factors for the dolphin population, though with a similar revenue to be gained, based on the triple bottom line;
- The daily fleet needs to be restricted; and
- To reach a sufficient level of care, a joint effort to reach a standard price for dolphin watching at a high-end level could ensure that incomes remain stable. However, the number of dolphin-watching boats should remain low and an economic incentive can be reached.

When incorporating these recommendations, a sustainable approach for dolphin watching in Lovina can be realised, leading to no financial loss for the boatmen, a less disturbed population of spinner dolphins and more satisfied tourists.

Note

1 USD 4.5 million would be USD 5.5 million in 2022. Mustika's research took place from 2008 to 2009 (https://www.officialdata.org/us/inflation/2012?amount=4500000).

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RESEARCH
ARTICLE

The Catalan tourism subsystem: applying the methodology of subsystems in the tourism sector

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ABSTRACT: The analysis of input-output is one of the methodologies most applied in tourism literature to the study of the impacts of tourism activity. In this article, we apply the input-output (IO) subsystems methodology. This methodology is a useful tool for studying the productive structure of the different sectors of an economy. Using it offers us the chance to renew the IO methodology, often used to calculate the economic impacts of tourism. In that sense, we have used this methodology to check two main things: first, the importance of every subsector in the tourism sector and the links between them and the rest of the economy as input supplier and, second, the existence of a tourism subsystem. When we analyse the relations between the subsectors, we found that strong economic links exist between them. The different subsectors operate as suppliers and in turn use the other subsectors as suppliers to offer their final products. Those give us some indications about the existence of a real subsystem between the tourism subsectors, which can give us more information about the tourism sector, the links between the different tourism subsectors, the evolution during recent years and the changes in the relations between subsectors. We chose Catalonia because tourism is one of the most important economic activities, contributing more than 10% of GDP and with a similar importance in jobs creation: more than 400 000 jobs directly related to tourism. Those data meant 17 million international arrivals during 2015.

KEYWORDS: direct effect, impacts, input-output analysis, subsector

Introduction

Over the past few decades, the tourism sector has emerged as one of the key drivers for economic growth across the world. Various organisations, including the World Travel and Tourism Council (https://wttc.org/Research/Economic-Impact), have calculated that tourism accounts for approximately 10.2% of global GDP. The tourism sector is of great importance to the Spanish economy, and in particular for the region of Catalonia. With more than 47 million tourist trips and 17 million international visitors, tourism generates 10.2% of the Catalonian GDP and more than 11% of total jobs.

Catalonia is a region of north-eastern Spain, with a population of over 7.5 million people and which accounted for 20.1% of the Spanish GDP in 2018. In terms of tourism, Catalonia was the first area to receive international tourists in the late 1940s, and this region focused on developing tourism-related activities during the 1950s, 1960s and 1970s. In 2018, Catalonia received more than 19 million international tourists, accounting for 23.1% of international tourist arrivals in Spain. Furthermore, Catalonia is the most popular destination for tourists from within Spain: in 2018 Catalonia received more than four million Spanish tourists and Catalans themselves took 20.4 million trips around Catalonia. These figures translate into over 44 million tourist trips taken in Catalonia.

The increasing importance of the tourism and hospitality sector requires an important effort to obtain more knowledge about our sector. As stated by Lashley (2018), sometimes we focused our energy on "how to do", not on a deeper analysis of the reasons or to obtain a research knowledge of our sector. The tourism and hospitality industries, in the present and in the near future, need to increase critical thinking and the knowledge of their professionals and graduates.

The economic impacts of tourism is ever-present in the literature on tourism (Song et al., 2012; Tyrrell & Johnston, 2006), since many countries recognise the importance of accurate information about the impact of tourism on their respective economies. The main reason is that tourism is considered to be one of the key sectors when looking to develop a country's economy. Various researchers confirm that tourism is able to generate important economic impacts, leading to an increase in GDP and job creation (Duro & Rodriguez, 2011; Dwyer et al., 2006).

In that sense, recent research into tourism growth has focused on analysing the real link between economic growth and tourism. Chatziantoniou et al. (2013) present the main hypothesis and references drawn from this substantial body of work: A

tourism-led economic growth hypothesis (TLGH); economic-driven tourism growth (EDTG); bidirectional causality (BC); and a no causality hypothesis (NC). The study by Balaguer and Cantavella-Jordà (2002) was one of the first to present the TLGH theory, following by the export-led economic growth hypothesis (ELGH), as presented in Brida et al. (2016). Both theories are linked in that they conceptualise tourism as a type of export. The same authors included a broad review of the tourism-growth literature based around the TLGH theory, which included more than 100 research papers. A recurring theme throughout these papers is that tourism is one of the main determinants of economic growth. Regarding Spain, Perles-Ribes et al. (2017) presented an in-depth analysis of the relationship between tourism and economic growth in which they found that tourism and economic growth are demonstrably linked. The authors argue that the two phenomena are correlated through a bidirectional causality, which is significant for Spain given that the tourism sector is central to the national economy.

Over the next few paragraphs, we present a brief review of the literature on the methodologies employed in the analysis of the economic impacts of tourism. Various methodologies have been used to calculate the economic impacts of tourism. One widely used technique is the Keynesian multiplier methodology, developed by Archer (1977). With this methodology, we can calculate an exact number to quantify the economic impact of an increase in the demand in tourism. In recent years, researchers have used this technique to estimate or forecast the impacts of events on local areas, especially when there was limited data available (Llop & Arauzo-Carod, 2012). However, using Keynesian multipliers to analyse impacts over larger regions can be problematic, due to the difficulty in discerning intersectoral effects, and the choice of these relationships between sectors is very subjective (Fletcher, 1989). Other authors, for example Frechtling and Smeral (2010), apply alternative methodologies like econometrics models or structural equations models. But those methodologies do not easily offer consistent results with respect to the identification of the economic impacts of tourism (Assaker et al., 2010; Van Leeuwen et al., 2009).

Another widely-used methodology is input–output (IO) analysis. Archer (1977), Fletcher (1989) and Archer and Fletcher (1990) developed some applications for the tourism sector. The literature on tourism provides many examples of the use of the IO methodology to analyse economic impacts for a country or region. These include the studies conducted by Archer and Shea (1977) on the impacts of tourism for Wales, those carried out by Archer (1995) for the Bermuda islands and by Archer and Fletcher (1996) in their analysis of the impact of tourism on the Seychelles. For the Spanish regions, Polo and Valle (2008) provide an analysis of the economic impact of tourism on the Balearic Islands, and three studies for the specific case of Catalonia by Baró and Vilafaña (2005), Baró (2010) and another by Polo et al. (2008), specifically about the economic impact of hotels in the city of Barcelona.

Fletcher (1989), Briassoulis (1991) and Polo et al. (2008) describe the advantages of using the IO methodology as opposed to other methodologies. They argue that IO is a valuable methodology for the following reasons: First, it is capable of fully analysing the linkages between tourism and other sectors; second, it reveals the impacts of tourism activity on other economic sectors; third, it is a *neutral* methodology and does not imply previous considerations concerning the sector; and, finally, this methodology reveals all the effects, including direct, indirect and induced effects.

Miller and Blair (2009), in their seminal book, explain the limitations of the IO methodology which are based around several assumptions. First, the model supposes that the technical coefficients are fixed such that there are no economies of scale or externalities. In addition, it also assumes that the trade relationships between sectors, the economy and the rest of the world are stable. Secondly, resources are assumed to be infinite and able to cover all output requirements. Finally, regarding the job market, the method assumes that there is unemployment and, that, when the economy needs a labour force, it is easy to find it.

In recent years, this methodology has received various criticisms, and some authors prefer to apply social accounting matrix (SAM) models as an evolution of the IO model (Jones, 2010; Polo et al., 2008), or the computable general equilibrium models (CGE) to analyse the economic impact of tourism. Authors, including Dwyer et al. (2004), Blake (2009) and Pratt (2011), assert that IO methodology is not flexible enough to consider problems involving prices and the assumption of full factor availability, linearity in consumption and production functions and the difficulty with its application to long-term analysis, because the tables are prepared for a fixed point in time. However, CGE models also display serious limitations. These include the addition of a series of additional simplifying assumptions and the fact that they require significantly more information. This often leads to work with very low levels of sectoral disaggregation. Despite these limitations, according to Mules (2005), the application of input-output or CGE models leads to similar results. Recently, the appearance of Tourism Satellite Accounts (Diakomihalis & Lagos, 2011; Frechtling, 2010; Madsen & Zhang, 2010), following UN recommendations, has improved the level of information which can be extracted and applied through an IO methodology.

In this article, we apply a specific IO technique, the subsystem methodology, to study the sectoral interrelations of tourism activities. Subsystem analysis provides a highly detailed level of disaggregation on the linkages between branches within the subsystem, and outward connections from the subsystem branches to the rest of the economy. Following Alcántara and Padilla (2009), we apply a recent development in this methodology to the tourism sector, with the aim of estimating the empirical impacts of tourism on other sectors in the economy, and in the tourism sector itself. Similar and recent studies applying subsystems methodology, related to tourism but centred around cultural issues, such as Llop and Arauzo-Carod (2012) and others, apply similar methodologies to different activities. For example, Saari et al. (2013) look at agriculture, or Butnar and Llop (2010) consider health care institutions.

The application of this methodology allows us to separate activity caused by an increase in the final demand of the tourism sector into the activity produced in the tourism sector, the so-called internal component, as well as the spill-over component referring to the activity produced in external sectors. Applying this methodology to tourism has the added benefit of providing more information about the structure of that sector, which as mentioned above, is critical for the Catalonian economy. Baró and Vilafaña (2005) and Baró (2010) analysed the Catalonian tourism sector as a whole and does not consider the relationships between the different subsectors. Overall, the application of the subsystems methodology has

various advantages, it can provide a better understanding of the structure of the tourism sector in Catalonia, while also enabling us to observe the relationships between the various subsectors that make up the tourism system.

This methodology gives us the chance to estimate the impact that the tourist system has on other sectors. A wealth of existing literature, which includes Sinclair (1998), Balaguer and Cantavella-Jorda (2002), Durbarry (2004), Dritsakis (2004), Figini and Vici (2010) and Pablo-Romero and Molina (2013), among others, study how tourist activity helps economic development through the connections which exist between tourism and other key economic sectors. This has extended the literature on tourism-led economic growth (TLEG). As stated in Bastos and Rejowski (2015), more research in methodologies is needed in our research field and this article is an attempt to increase our knowledge and to have more tools to do research in tourism and hospitality.

One of the main problems which arises during research into tourism is how to precisely define the tourism sector, and we discuss this question in the following sections. Having established a definition, we ask what the optimal way is to use our categorisation to adjust the information taken from the input-output tables to discover the underlying configuration of the tourism sector. We can then adjust the information obtained by the input-output tables and make accurate calculations of the activity rate related to tourism. One clear example of this is the activity generated by tourism in the transport sector. The required data is contained in the input-output tables, but it is very difficult to distinguish which activity is driven by changes in the tourism market, and which not. This investigation is a first attempt to estimate the significance of the tourism subsector and its relevance in the overall national economy using this methodology. The structure of the article is as follows: the second section presents the methodology employed by the analysis. The third section presents the results and finally, the fourth section presents the conclusions.

Methodology

To start with, we will discuss our work on a key topic when investigating tourism, which is the definition of the activities which belong to the tourism sector. To form a coherent definition, we will discuss several previously conducted studies which focus on defining tourism. Tyrrell and Johnston (2006) report that tourism and other related elements have been defined in different ways and that the criteria applied may affect the results and conclusions of research into the tourism sector. We will highlight a few proposals from the existing literature alongside our own about the industries which we consider as belonging to the tourism sector.

Fletcher (1989), who studies the impacts of tourism in Spain using the IO methodology, defines five subsectors as belonging to the tourism sector: Hotels, catering, entertainment,[1] transport and other industrial sectors. In another study, Frechtling and Horváth (1999) identify key sectors as road, urban and suburban transport, the retail sector, with the exception of catering activities, car rental, accommodation and other entertainment services. These projects chose these sectors intuitively and none of them used clear logical or economic criteria to define the tourism sector.

Finally, in 2001, the UN Statistics Division, with the Eurostat, the Organisation for Economic Co-operation and Development (OECD) and the United Nations World Tourism Organisation (UNWTO) proposed the Tourism Satellite Account (TSA), giving rise to a list of the activities which can be considered to belong to the tourism sector and a guideline to define the tourism sector for researchers. The TSA includes 18 subsectors.[2] From these, the sector labelled "Other services" includes financial and insurance services, in addition to other rental services, and it is very difficult to identify which of these activities is strictly confined to the tourism sector. To do so, additional and more detailed statistics are required, which are not currently available. Finally, the TSA defines 12 tourism characteristic subsectors.[3]

In this article, we considered two options. The first is to follow the list outlined by the Spanish TSA, as defined by the Institute of Tourism Studies (IET, 2004), adapted to the input-output tables for Catalonia. These activities (accommodation, food and beverage, passenger transport, travel agencies and tourism guides, cultural, sports and other entertainment, and other services) have also been proposed by the UNWTO. The second potential option is to consider only the core tourism subsectors (accommodation, food and beverage, travel agencies, entertainment and leisure services). We opted for the second option as a tourism subsystem.[4] The main reason is that we have strong doubts about our ability to accurately estimate our model if we include transport activities as a subsector of the tourism system. Transport services include important activities not related to tourism, such as freight transport or dairy transport, and there is no precise way to separate these different activities, given the available data.

As we stated in the introduction, the aim of this article is to discover the real impacts of the tourism sector through an IO analysis of the tourism subsystem. The first researcher to use the subsystem method was Sraffa (1960) and, subsequently, so have Harcourt and Massaro (1964), Pasinetti (1980; 1986; 1988), Sinisalco (1982), Deprez (1990) and Heimler (1991). Alcántara (1995) adapted it to the analysis of different atmospheric emissions for Spain, and Alcántara and Padilla (2009) developed this methodology to analyse the CO_2 emissions of the services subsystem in Spain. To do so, the authors developed the IO methodology to find matrix equations which allowed them to mathematically decompose the CO_2 emissions generated to satisfy demand in the services sector into different components, determining the importance of each inter-sector connection and simultaneously the importance of links between each subsystem and external sectors. We will not analyse emissions, but we will use these authors' development of the IO methodology to examine tourism activity and discern which sectors are more affected by fluctuations in tourism demand. Readers not familiar with the IO methodology can obtain a solid understanding from the book by Miller and Blair (2009). There is a great amount of literature on how this methodology can be effectively applied to tourism, for example Briassoulis (1991) explains the fundamentals of using the IO methodology in tourism.

As stated by Alcántara and Padilla (2009, p. 906), "[i]n the framework of input-output analysis, the study of a particular sector, or a group of sectors, without delinking it from the rest of the system, might be made by treating this sector or sectors as a subsystem generating a single final output, the output of the sector or sectors". A leading advantage of this methodology is the ability to extract information on linkages

between subsectors and from each subsector to other areas of the national economy (Alcántara & Padilla, 2009; Navarro & Alcántara, 2010; Piaggio et al., 2013). This provides sufficient support for using this methodology and we think that it is a good method for estimating the importance of tourism isolated from the wider economy. It is common to run into problems when defining the tourism sector and its importance in comparison with other economic sectors, so this methodology allows us to analyse the importance of subsectors in isolation and across time.

This research tries to answer some questions about the tourism sector and to develop new research methodologies to increase the knowledge of tourism. Our research questions are:

- Can we use input-output subsystems as a methodology to study the tourism activity?;
- Is the tourism sector correctly explained by the relation between the tourism subsectors?;
- Does the economic importance of this sector come from the relation between the subsectors?; and
- Has the tourism sector significant relations with the other economic sectors?

To answer these questions, we present the methodology and our results. First, we define the variables, parameters and vectors used:

A = Matrix ($n \times n$) of technical coefficients of the Leontief model. The economic system is composed of n sectors that belong to set N.

N = (1, 2,..., m,..., n), where 1, 2,..., m are the m subsectors not belonging to the tourism sector and m+1,..., n are the t subsectors of the tourism sector ($t = n-m$).

I = Identity matrix

B = $(I-A)^{-1}$ Leontief inverse matrix

x^R = column vector ($m \times 1$) which denotes the production of the m subsectors which do not belong to the tourism sector.

x^T = column vector ($t \times 1$) which denotes the production of the t subsectors which belong to the tourism sector.

y^R = column vector ($m \times 1$) which denotes the final demand of the m subsectors which do not belong to the tourism sector.

y^T = column vector ($t \times 1$) which denotes the final demand of the t subsectors that belong to the tourism sector.

Production and final demand can be then expressed as:

$x = \begin{pmatrix} x^T \\ x^R \end{pmatrix}$ is the production vector

$y = \begin{pmatrix} y^T \\ y^R \end{pmatrix}$ is the demand vector

We can present the tourism subsystem model in its different components. We adapt the Leontief matrix:

$$\begin{pmatrix} A_{TT} & A_{TR} \\ A_{RT} & A_{RR} \end{pmatrix}\begin{pmatrix} x^T \\ x^R \end{pmatrix}+\begin{pmatrix} y^T \\ y^R \end{pmatrix}=\begin{pmatrix} x^T \\ x^R \end{pmatrix} \quad (1)$$

Where the first element is the matrix A; separated according to the relationship of its coefficients with the tourist and the other sectors. We operate with this model until we obtain expression (2):

$$\left[\begin{pmatrix} A^D_{TT} & 0 \\ 0 & A^D_{RR} \end{pmatrix}+\begin{pmatrix} A^O_{TT} & A^O_{TR} \\ A^O_{RT} & A^O_{RR} \end{pmatrix}\right]\begin{pmatrix} B_{TT} & B_{TR} \\ B_{RT} & B_{RR} \end{pmatrix}\begin{pmatrix} y^T \\ 0 \end{pmatrix}+\begin{pmatrix} y^T \\ 0 \end{pmatrix}=\begin{pmatrix} x^T_T \\ x^R_T \end{pmatrix}$$

We then obtain:

$$A^D_{TT}B_{TT}y^T + A^O_{TR}B_{RT}y^T + A^O_{TT}B_{TT}y^T + y^T = x^T_T \quad (3)$$

$$A^D_{RR}B_{RT}y^T + A^O_{RR}B_{RT}y^T + A^O_{RT}B_{TT}y^T + 0 = x^R_T \quad (4)$$

Expression (3) gives us the vector of tourism production for the tourism subsystem, that is, the tourism production needed to satisfy the final demand of the tourism subsystem, and so gives us the internal effects of tourism. The second expression (4) gives us the production necessary in all additional sectors to cover the tourism sector demand, and so indicates the external effects of an increase in demand in the tourism sector.

The impact of each of the tourism subsectors on other service branches, in regard to their structural relationships with non-tourism sectors, is determined by diagonalising . Where:

$A^D_{TT}B_{TT}\hat{y}^T$ indicates the quantity of own inputs that each tourism subsector purchases to obtain its own final demand, aka the internal own component.

$A^O_{TR}B_{RT}\hat{y}^T$ indicates the input production that tourism produces for the non-tourism sectors, so that these obtain the output that the tourism sector demands to them, aka the feed-back component.

$A^O_{TT}B_{TT}\hat{y}^T$ indicates the production required by tourism subsectors from other subsectors of the tourism subsystem, aka the internal spill-over component.

Some examples:

Internal-own component: A travel agency places an order for rooms at an accommodation company to create tourist packages. In that case, the travel agency demands inputs (rooms) to create its outputs (trips).

Feed-back component: A travel agency sells trips to an architecture business to draw the plans for a hotel.

Internal spill-over component: A hotel asks an events company to organise a special event. In that case, the hotel does not need inputs from the events business, the hotel wants an output created by an events company. And $\hat{y}^T$ is the demand volume component, which indicates the final demand of the sectors that belong to the tourism sector. And the different parts of the component of the second equation (spill-over component), which show the spill over on the rest of the economy, are:

$A^D_{RR}B_{RT}\hat{y}^T$ captures the demand of within-sector inputs for a non-tourism sector, due to demand from the tourism sector.

$A^o_{RR}B_{RT}\hat{y}^T$ captures the input quantities of non-tourism sectors purchased by the other non-tourism sectors, to cover demand from the tourism sector.

$A^O_{RT}B_{TT}\hat{y}^T$ indicates the input production of the non-tourism sector allocated to the tourism sector.

Those vectors give us the strength of the connections between the tourism subsystem and the rest of the economy and for the connections between the economic branches which constitute the tourism subsystem. Thus, it allows for a better understanding of the subsystem itself, and the size of shocks to any given branch on the subsystem itself and on the rest of the economy. The following are some specific examples:

Case 1: A hotel needs inputs from the textile industry, and the textile industry orders ink from the chemical industry.

Case 2: A restaurant needs food and asks a farmer to cover the inputs, the farmer in turn asks a transport service to deliver the product.

Case 3: An event business orders flowers from a florist to be used for decoration.

We decided to analyse the internal tourism subsystem, as specified in equation 3, because the interest of this article is to demonstrate the existence of a tourism subsystem in itself. In the next section, we will present our research on the Catalonia case study.

Results

This article has one main objective: to estimate the size of the internal effects on the tourism sector and the external effects on other sectors of the economy derived from fluctuations in the demand and supply of products in the tourism sector. In Table 1, we present the different subsectors and the weight of their influence on other subsectors of the tourism sector and over the other non-tourism sectors (feedback).

During the first calculation process, we see that the main impacts come from the demand side (), with a minimum of 90% of the origin of the activity. Those results show that demand in a subsector is mainly driven from within that subsector. But the most significant results come from the analysis of other impact components, the internal own component, the feed-back component and the internal spill-over component. The economic activities explained by those effects are of little importance, but the research into the tourism subsystem structure provides some interesting results.

(1) The main effects over the accommodation subsector come from the internal spill-over component in two of the input-output tables (2001 and 2011).[6] The accommodation subsector uses other subsectors as a supplier for its activities, for example the entertainment or food and beverage industries. Accommodation has some restrictions in its capacity to meet demand and, sometimes, needs to trade with other subsectors to offer a complete product. For example, when a hotel hosts a large conference, the catering services need help from other companies.

(2) Food and beverages, travel agencies and entertainment obtain the most significant results for the internal own component, except for one observation (Food and beverage year 2001). These results are intuitive since they simply confirm traditional working patterns for these subsectors. For example, retail travel agencies purchase inputs from wholesale travel agencies, or entertainment service providers contract other entertainment companies.

(3) The feedback component shows little significance. The tourism subsectors are not often used as inputs by non-tourism subsectors, but we can provide some preliminary results. Over recent years the number of events such as congresses or business fairs organised by non-tourism subsectors has increased globally.[7] This leads to a considerable increase in input demand for the accommodation and food and beverage subsectors. In the case of Barcelona, the number of large meeting events increased from 373 in 1990 to 2 134 in 2017 (Barcelona council, 2017). Some of these events are organised by businesses not related to tourism, for instance for incentives or courses, many of them organised by the companies on its own or by the sector related to the event. The medical sector is one of the most active, to the point where the medical association of Barcelona has its own events manager[8] as part of one medical educational foundation. In contrast, travel agencies have seen a reduction in demand as a result of the boom in e-commerce and the popularity of buying flights online. Over the last few years, the increasing presence of the internet in our lives has made the purchase of these types of products (accommodation, flights, rentals, tourist guides, etc.) very accessible and simple (Xiang et al., 2015). This has ultimately led to a large reduction in the size of the travel agency market.

Another important issue to consider is the importance of the outsourcing. Research conducted by Espino-Rodríguez and Padrón-Robaina (2004), Hjalager (2006) and Lamminmaki (2011), among others, presented some general facts about the accommodation sector. Most accommodation companies had started a process of outsourcing some services in their hotel and accommodation business. The main reason was to reduce costs. For example, some services such as laundry or cleaning services have been outsourced to external companies. These, however, are not the only services to be outsourced as we also find evidence of similar practices in food and beverages and entertainment. This represents a change for these subsectors as activities which were traditionally performed in-house are now performed by other subsectors in tourism. This may explain some of the changes during the period analysed.

It is true, according to Kirschner (2015), that accommodation and entertainment services are not sectors which report a high percentage of outsourcing in the European Union-28 (EU-28), just 19% and 18% of their production respectively. This is significantly less than other sectors, such as construction (38%) (Kirschner, 2015). The internal own component shows increasing values over the years studied, which means that the different subsectors increase the use of inputs from other subsectors to create their final output. This provides additional supporting evidence for the increasing importance of outsourcing in the tourism sector.

The other hypothesis of the article is about the structure of the tourism subsystem itself. We are interested in showing that a set of different subsectors, all offering a service related to tourism, constitute a subsystem. Table 2 provides the values from the input-output tables and it is clear that the majority of links between different subsectors has strengthened over the last ten years.

As highlighted previously, the largest fraction of activity comes from the demand side of the market, however, the use of other subsectors as input suppliers is also worth mentioning. For example, under the internal own component results, three of the subsectors (food and beverages, travel agencies and entertainment) report the highest values when the different tourism subsectors sell inputs to the other tourism subsectors. In addition, when we consult the final column, the internal spill-over component, we see high levels of output generated by tourism subsectors for other tourism subsectors. The links between the subsectors are strong and demonstrate that tourism subsectors are cooperating between themselves and beyond the travel agency subsector.

Conclusion

This article looks to provide new tools to improve research into the economic impacts of tourism. There is well-established literature about the impact of tourism and how to apply

TABLE 1: Internal own, internal spill-over and feedback values

Subsector	Internal own		Feedback		Internal spill over	
	2001	2011	2001	2011	2001	2011
Accommodation	6.60%	17.80%	6.30%	11.40%	87.10%	70.80%
Food and beverage	27.30%	58.20%	12.10%	11.20%	60.60%	30.60%
Travel agencies	73.20%	77.20%	10.50%	0.70%	16.40%	22.10%
Entertainment*	71.10%	85.50%	11.80%	7.10%	17.10%	7.40%

*The entertainment subsector has been divided in two different subsectors in the 2011 input–output table, being impossible to operate with the different subsectors, we preferred to continue with just the entertainment subsector to maintain the comparison between the different input-output tables.

TABLE 2: Destinations and basic prices

Subsector	2001 € million	2011 € million	2001 € million	2011 € million	2001 € million	2011 € million	2001 € million	2011 € million
Accommodation	13.1	45.2	1.1	6.5	275.9	185.8	44.2	42
Food and beverage	2.4	33.7	25.2	240.5	51.5	165.8	12.7	36
Travel agencies	12.5	34.5	–	0.9	180.7	122.8	8.7	10
Entertainment	25.9	22.0	21.0	1.0	1.8	0	448.9	928

the input-output methodology. Despite this, the use of this methodology to study the impacts of tourism specifically is relatively underdeveloped and this article contributes by offering a valid methodology to estimate the real impact of the tourism activity, beyond simply providing descriptive evidence or estimating multipliers. Then, IO subsectors is an interesting methodology to increase the knowledge in our field.

Second, we defined the tourism sector around four subsectors. Namely, accommodation, food and beverages, travel agencies and entertainment activities. Future research should include the transport sector in this subsystem. However, to do so, we need additional literature and tools which will give us an indication about how to separate tourism from non-tourism transport activity.

Third, we have shown that the tourism sector is made up of different subsectors which each have strong links between them. The subsystem methodology provides accurate and relevant information about the cooperation between these subsectors. Tourism subsectors are regular suppliers for other tourism subsectors. The results demonstrate that there does exist a subsystem in the tourism sector and that considerable economic activity flows across this subsystem. If the transport sector can be effectively included into this subsystem, then this work will be advanced even further due to the obvious relevance of transport for tourists. Therefore, our research questions 2 and 3 are well explained by the use of the IO subsystem methodology. We found that tourism is defined by four sectors and the economic importance lies in the relation between them.

The last research question is: Are the relations with the other sectors significant? This question requires a deeper analysis, because we saw that it has economic importance, but not as big as the relationship between the economic subsectors. As we said, we focused in the intra relations and we will continue the research, expanding the calculations to the rest of the economic sectors.

As we stated in previous sections, Alcántara and Padilla (2009) developed this research to know the CO_2 emissions, so maybe this methodology could be used to know the environmental impact of tourism and the hospitality sector and to obtain ways to reduce the environmental impact of our sector.

Notes

1 Cinemas, theatres, museums and galleries, sports, bullfights, radio and TV channels and others.
2 Find the complete list at http://www.ine.es/metodologia/t35/metosateln.pdf
3 Accommodation, second home ownership (imputed), food and beverages, passenger transport services by rail, passenger transport services by road, maritime transport services of passengers, air transport services of passengers, additional services for the carriage of passengers, vacation goods passenger, travel agencies and similar, cultural services, services for sports and other recreational activities.
4 When we obtained the first results through option 1, including transport, they were very inconsistent, showing that the inclusion of transport in the subsystem generates some inconsistent results. We had some data constraints and to try to differentiate between the transport related to tourism and the transport related to other activities had the potential to give us some insurmountable methodological problems.
5 The 2005 input-output Catalan table is an update from the 2001 input-output table, and it can give some results differing from the other years (2001–2011).
6 In 2014, the UN World Tourism Organization presented a document *Tourism Highlights* (https://www.e-unwto.org/doi/pdf/10.18111/9789284416226), which reflected the growing importance of the events subsector.
7 Acadèmia de Ciències Mèdiques i de la Salut de Catalunya i les Balears [Academy of Medical Sciences and Health of Catalonia and the Balearic Islands].

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Effects of mindfulness on occupational stress and job satisfaction of hospitality and service workers

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ABSTRACT: Hospitality and service workers commonly work under psychological and physical pressure with long working hours, resulting in high levels of occupational stress that affect their overall well-being and job satisfaction. This study investigates the effects of a mindfulness intervention on occupational stress and job satisfaction of hospitality and service workers. A total of 14 professionals participated in the study. They integrated a 15 to 30-minute audio mindfulness session into their daily work routine for fifteen days. A quasi-experimental pretest-intervention-posttest design was used. To measure the effects over the intervention period, a paired samples t-test was conducted. When data were not normally distributed, the Wilcoxon rank-sum test was performed to assess changes. After the intervention, participants showed significantly higher values in general mindfulness and job satisfaction and significantly lower scores in occupational stress. The present study shows that even low-cost, self-directed mindfulness training has a beneficial impact with significant work- and health-related relevance. Based on these findings, managers in the hospitality industry are recommended to invest in mindfulness training and integrate it into their human resources strategy.

KEYWORDS: mindfulness, occupational stress, job satisfaction, human resource management {Use terms NOT in the title}

Introduction

In Western countries, the desire for a healthy lifestyle is influenced by social and cultural factors. Meditation, yoga and healthy eating are trends that have gained prominence and, in a post-COVID hybrid work environment, further necessitates the need for renewed balance. According to the International Food Information Council (2020), 54% of US consumers surveyed in the Food and Health Survey are paying more attention to the healthfulness of their food and beverage choices in 2020 than in 2010. In addition, Clarke et al. (2018), who surveyed US adults aged 18 years and older, found an increase in the use of complementary health approaches from 2012 to 2017. Yoga use increased from 9.5% to 14.3%, while meditation use more than tripled from 4.1% in 2012 to 14.2% in 2017. The new lifestyle in demand is characterised by the desire for quality of life and self-realisation to achieve balance and satisfaction. This shift toward a more post-material set of values is also carrying over into the business world, where increasing emphasis is being placed on health promotion and a better work-life balance.

The performance culture of today is characterised by speed and an efficient flow of information, which puts employees under increased pressure to perform (Xu et al., 2021). Several researchers have identified occupational stress as a critical issue in many organisations, as there is a growing body of literature showing that workplace stress can contribute to work-related illnesses that affect both physical and psychological well-being (Bohle & Quinlan, 2000). Lazarus and Folkman (1984, p. 19) state that "psychological stress is a particular relationship between the person and the environment that is appraised by the person as taxing or exceeding his or her resources and endangering his or her well-being". Occupational stress can also be observed in the particularly fast-paced and highly competitive hospitality industry, where employees are exposed to a very high level of emotional demands. Many hospitality workers are at risk of compromising their mental and physical well-being due to poor working conditions, such as shift work and long working hours (Lo & Lamm, 2005). According to Hurley (2015), the burnout rate of hospitality workers is among the highest of all industries. This also has implications for job satisfaction, which is defined as the emotional state that results from evaluating one's work and work experiences (Locke, 1976).

In recent years, organisations in Western societies have also increasingly used spiritual practices to train employees and managers (Bell & Taylor, 2003; Purser & Loy, 2013). In particular, the concept of mindfulness has gained increasing attention in academic literature, and its implementation in the corporate world is gaining popularity. Mindfulness originated in Buddhist meditation practice and is a particular way of directing attention by observing the present moment and taking in all experiential content consciously, nonjudgmentally and with acceptance and kindness (Heidenreich & Michalak, 2003; Kabat-Zinn, 2003). It is believed that participation in mindfulness-based practices leads to a reduction in discomfort, increased productivity and

minimised stress (Heidenreich & Michalak, 2003). While large companies such as Google already offer mindfulness-based programmes for their employees, many businesses, managers and human resource professionals, including those in the hospitality industry, may not be aware of this (Reb & Atkins, 2015).

Employees in the hospitality industry are exposed to a high level of emotional demands and stressful situations, as one of the most important requirements is to be empathetic, positive and friendly at all times when dealing with customers to achieve adequate customer satisfaction (Grandey, 2003; Hochschild, 1983; Sardiwalla, 2003). Dealing with angry or impatient customers and a hectic pace of work is common among hospitality and service workers (Pizam, 2004). This requires employees to maintain a high level of self-control and can lead to emotional exhaustion, job dissatisfaction and even burnout (Pizam, 2004). With the ever-increasing demands to work faster and more efficiently, many employees become overwhelmed, causing them to look for another employer that promises better working conditions.

Human resources are the most valuable asset in the hospitality industry, as the talents, skills and knowledge of employees are the only sustainable source for any organisation (Nel et al., 2014). While many employers outwardly claim to genuinely care about the well-being of their employees, the reality can be quite different. A key indicator of employee dissatisfaction in the hospitality industry is that employee retention rates are among the lowest of any industry, which in turn leads to poor customer satisfaction and lower profitability due to high annual additional costs (Pranoto, 2011). Low job satisfaction is cited as a contributor to these high staff turnover rates, which are primarily caused by occupational stress and work overload (Lo & Lamm, 2005; O'Neill & Davis, 2011). Companies should therefore acknowledge the pressures on hospitality employees and provide behavioural interventions to address and alleviate these issues.

Purpose and relevance of the study

There is little to limited existing research related to the use and implementation of mindfulness for hospitality and service employees. Therefore, the rationale of this study is to investigate whether the utilisation of mindfulness can help employees better manage occupational stress and simultaneously increase their job satisfaction.

The findings of this study are particularly relevant to managers and human resource professionals to consider whether mindfulness-based training should be invested in and thus integrated into employee development and well-being to reduce high staff turnover rates. Furthermore, if the intervention proves successful, each employee can benefit by routinely integrating mindfulness training into their daily work routine and thus using it specifically as a prevention and coping strategy against occupational stress and for greater job satisfaction. In addition, the results of this research may also be relevant to education and training institutions, as they may offer mindfulness-based interventions as preventive measures for students who are the future employees in the industry.

Literature review

The literature review summarises the theory about mindfulness, including the definition of key concepts. In addition, research is reviewed that addresses the association between mindfulness, occupational stress and job satisfaction. Studies are included that applied a similar intervention approach as implemented in the current study, thus allowing for a valuable comparison between the results. Given the setting of the study and the fact that there are very few studies on similar interventions in the hospitality industry, the selection of literature was based on comparable service industries, operating in a Western European context.

Mindfulness

Kabat-Zinn (1994) defines mindfulness as a specific kind of attention given purposefully in the present moment with a non-judgmental gaze. This non-judgmental attitude allows one to perceive and observe present circumstances and events as they are, without distorting them emotionally or intellectually through any form of evaluation (Buchheld & Walach, 2004). It further requires a conscious focus on the present experience in which the individual is not entangled in worries and reflections about the past or the future (Brown et al., 2007). Thus, it is a process of gaining insight into the nature of the mind and adopting a decentred perspective on one's thoughts and feelings (Bishop et al., 2004). The basis for mindful behaviour is an open and accessible mindset that allows the individual to become aware of their own inner experience, including emotions, thoughts and behavioural intentions, as well as engaging with external events (Brown et al., 2007). The practice of mindfulness is associated with increased resilience, as well as greater vitality and a reduction in perceived stress (Aikens et al., 2014). According to Zeidan et al. (2010), it is further thought to help improve performance by increasing cognitive flexibility and alertness and protecting against distractions and performance errors.

Mindfulness and occupational stress

The best-known documented benefits of mindfulness activities are psychological, and perhaps the most cited psychological benefit is stress reduction. According to Allen et al. (2015), there is sufficient evidence that mindfulness-based training can be effective in reducing employee stress and strain. This finding is consistent across the literature reviewed, regardless of the type of work, the existing stress level of the employee, or the mindfulness programme offered (Martín-Asuero & García-Banda, 2010; Roeser et al., 2013; Bostock et al., 2018). Mindfulness training such as the Mindfulness-Based Stress Reduction (MBSR) programme systematically reduces both psychological and physical stress symptoms (Chiesa & Serretti, 2009) and thus increases overall well-being (McCraty, 2003; Chu, 2010). According to Hyland et al. (2015), companies can increase employee engagement and retention by implementing mindfulness programmes, especially in jobs that involve high levels of stress. Weinstein et al. (2009) argue that the perception of stress is not only the result of an event itself, but more importantly the individual evaluation of the event as negative and exceeding their coping capacity. According to Hülsheger et al. (2013), mindful individuals encounter the present moment in a receptive, non-judgmental way and thus perceive stressful events more objectively and refrain from attaching any particular meaning or evaluation to them. Thus, the individual is prevented from being influenced by negative thought patterns that can lead to an overdramatic evaluation of the situation. Mindfulness facilitates the adaptive evaluation of stressful events, resulting in the employee having fewer negative and more positive affective

reactions, which in turn leads to a positive attitude toward the work situation (Hülsheger et al., 2013).

This finding is also corroborated by Shapiro et al. (2006), who argue that mindful individuals are better able to self-regulate and adapt effectively to stressful situations in the workplace. This is further evidenced by Wolever et al. (2012), who conducted a study on mind-body stress reduction in the workplace. During the study, 239 volunteers were randomly assigned to a therapeutic yoga programme for stress reduction at work, one of two mindfulness-based programmes, or a control-only group. It was found that participants of the mindfulness-based interventions showed significantly greater improvements in stress management, sleep quality and heart-rate variability ratio in direct comparison with the control group. Furthermore, Nadler et al. (2020) conducted a randomised, waitlist-controlled trial to examine the efficacy of an eight-week online mindfulness training programme in a sample of adults employed full-time at a company in the United States. In this study, the intervention group showed a statistically significant increase in resilience and positive mood and a significant decrease in stress and negative mood compared to the control group.

Mindfulness and job satisfaction

Given the non-judgmental component of mindfulness, researchers have identified that mindful individuals experience higher levels of job satisfaction (Hülsheger et al., 2013). This is because a mindful attitude promotes higher levels of self-directed behaviour, which in turn positively impacts employee satisfaction (Glomb et al., 2012). Furthermore, Shapiro et al. (2006) explain that it helps to focus attention and awareness entirely on the present experience, with automated routines becoming less frequent, thus helping individuals to stay more in touch with their basic values and needs. This is beneficial as job satisfaction and value fulfilment are closely related (Judge et al., 2005). Reb et al. (2017) also argue that employees' mindfulness competence is positively correlated with task performance, with this relationship mediated in part by the lower emotional exhaustion experienced by more mindful employees. Hülsheger et al. (2013) implemented a two-stage research design by first surveying 219 employees recruited from various organisations and measuring components such as job satisfaction and emotional exhaustion. The study further included a two-week mindfulness self-training programme with participants. It was found that particularly for employees engaged in emotionally demanding jobs, the utilisation of mindfulness is beneficial, as it can help reduce emotional exhaustion, prevent burnout and increase overall job satisfaction (Hülsheger et al., 2013). The results indicate that mindfulness can contribute significantly to better cope with the challenges in stressful and emotionally demanding occupations. Job satisfaction, in turn, is a strong indicator of staff turnover (Chen et al., 2011). According to Dane and Brummel (2013), mindful individuals are less likely to show turnover intentions because they are able to first cope with and then effectively manage stressful workplace demands. Chaskalson (2011) describes that the integration of mindfulness in the workplace leads to lower absenteeism and reduced employee turnover intentions. This is confirmed by Andrews et al. (2014) who argue that mindfulness is negatively associated with employee turnover. According to Hyland et al. (2015), companies can increase employee engagement and retention by implementing mindfulness programmes, especially in occupations that involve elevated levels of stress. As shown in Figure 1, the independent variable in the current study is mindfulness, while the dependent variables are occupational stress and job satisfaction.

Problem statement and research questions

The problem statement is formulated as follows: What is the effect of a mindfulness self-training intervention on occupational stress and job satisfaction of hospitality and service workers?

More specific research questions are:

1. Does completing a three-week mindfulness self-training intervention increase the perceived level of mindfulness values among hospitality and service employees?;
2. Does a three-week mindfulness self-training intervention reduce the perceived occupational stress among hospitality and service employees?; and
3. Does attending a three-week mindfulness self-training intervention increase job satisfaction among hospitality and service employees?

Method

Research design

The current study was conducted according to a quasi-experimental pretest-intervention-posttest design. The same variables were collected before and after the intervention to test its effectiveness. Next to testing the impact of the mindfulness training, some descriptive data were collected and some correlational analyses on relevant variables were also performed.

Instrumentation

Quantitative data was collected from the sample using a questionnaire that contained three main sections, namely the introduction, demographic information such as age, gender and weekly working hours, and a series of items related to mindfulness, job satisfaction and occupational stress. The independent variable *mindfulness* was measured using nine modified items from two of the most popular psychometric measures, the Mindfulness Attention and Awareness Scale (MAAS; Brown & Ryan, 2003) and the Freiburg Mindfulness Inventory (FMI; Buchheld et al., 2001). An example item is "When my attention is briefly diverted, I can easily refocus afterward". Job satisfaction was assessed using a seven-item scale in which items are partially modified from the Overall Job Satisfaction Scale (OJS) (Brayfield & Rothe, 1951). A sample item is "My job fulfils me". For measuring *occupational stress*, eight items were adopted and revised from the Occupational Stress Indicator (OSI) (Cooper et al., 1988). A sample item is "I often feel tense or stressed during the workday". All items

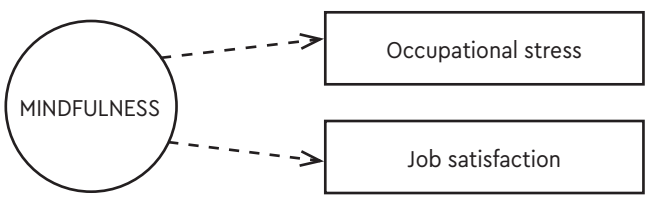

FIGURE 1. Conceptual framework representing the influence of mindfulness on occupational stress and job satisfaction

were answered using a five-point Likert scale, with 1 = never true; 2 = rarely true; 3 = sometimes true; 4 = often true; and 5 = always true.

The survey was pilot tested on a number of volunteers, which led to some minor changes in the formulation of a few items. For example, the items related to the variable of mindfulness were adapted from a general to a more work-related context based on the feedback received. The reliability and validity values for all scales were satisfactory and similar to the values reported in earlier studies.

Sampling

The target group and population of this study are in theory all employees in the service industry, broadly defined, including hospitality, tourism, leisure and retail business. Hospitality and service employees from different companies and departments in Germany and the Netherlands were included in the sample. To ensure comparability and reliability, the literature investigation predominantly included research studies that were also conducted in Western countries, such as Germany and the Netherlands.

To participate in the study, participants were required to be in paid employment for at least 30 hours per week and be willing and motivated to do the mindfulness training. The final sample consisted of nine female and five male individuals, including hotel employees from different departments, hospitality students currently working in the hospitality industry and service staff.

Data collection procedure

For this study, potential participants were recruited personally by the researchers. Recruitment methods included phone calls, email invitations, by word of mouth and direct personal contact. Upon initial contact, information about the study was provided by the researchers and participation was subsequently requested. To participate in the study, employees had to be willing to practise 15 to 30-minute mindfulness meditations daily for 15 working days and agree to complete a 15 to 20-minute online survey twice. Participation in the study was on a voluntary basis with no financial compensation.

After initial contact and giving consent to participate in the study, participants received detailed instructions of the mindfulness training with access to audio meditations. Participants received two different questionnaires at two separate times, which they could submit via Google Forms or complete in hard copy. Thus, the pretest was administered at the beginning of the three-week intervention and the posttest immediately after the treatment period. All data were stored in a database and then statistically analysed.

The intervention

The mindfulness intervention used for the sample was based on a pure self-training approach, without any group intervention. Each participant needed to be in possession of a working electronic device with *Spotify* installed to access the designated audio files on mindfulness. The planned intervention period was three weeks with a total of 15 working days. The mindfulness programme contained 15 mindfulness meditations of 15 to 30 minutes each. Due to its brevity, each meditation was easy to integrate into the participants' daily work routines. The audio files were available and accessible to the subjects at all times. Participants were free to conduct mindfulness sessions before starting work, during a break, or after work. In the posttest, participants were asked to indicate at what moment they had completed the mindfulness sessions. To check the regularity of implementation, participants were also asked how many sessions they had skipped. This served to filter out participants who did not regularly participate in the training and thus ensure the validity of the study. All audio sessions were offered through the *Mindful Movement Podcast* programme by Sara and Les Raymond, who are experienced trainers in the field of mindfulness meditation. Over the three-week period, participants were guided by the trainers through mindfulness meditations designed to cultivate an accepting, non-judgmental attitude toward what one is experiencing at that very moment. During the first week, participants received beginner's level meditations which focused on becoming more aware of their surroundings and the sensations happening in their bodies. Participants were also guided to focus their attention on specific anchor points, such as their breathing, to gain a calmness they could always return to when experiencing stressful moments. In the following two weeks, participants were introduced to various meditation topics, revolving around acceptance, letting go, decentring and loving-kindness. The goal was to remain mindful of inner and outer experiences in order to respond more consciously and to reduce stress.

Data analysis

Data analysis was performed using the statistical software package IBM/SPSS25. First of all, appropriate descriptive statistics was calculated for all variables in the survey. As this study was conducted according to a pretest-intervention-posttest design, we assessed whether the relevant variables had changed between two time points. A paired samples *t*-test was applied to detect and reveal changes over time. Each subject was measured twice, resulting in pairs of observations. When the data were not normally distributed, the Wilcoxon rank-sum test was performed to determine changes over time. To test the relationships between the designated variables, correlation and regression analyses were conducted.

Ethical considerations

According to Zegwaard (2015), in addition to the importance of selecting an appropriate research methodology, ethical considerations are critical to take into account when conducting this kind of research. Since this is a study of human subjects, it was imperative to obtain informed consent from all participants. Research participants were fully informed from the outset on what was required of them and how the research data would be collected and processed (Denzin et al., 2006). The collected data was safely stored, only used for research purposes and not disclosed to third parties. Informed consent also ensured that all subjects participated in this study of their own free will. Participants were further fully informed about the procedure of the intervention and possible risks and benefits. Furthermore, subjects were asked for their consent for possible publication of the study results. Informed consent was considered as a contract between the researchers and the participant, ensuring absolute anonymity, discretion and confidentiality to subjects throughout the research project.

Results

Descriptive statistics

Initially, 21 subjects participated in the study, of whom 13 were female and eight were male. Four subjects did not return the post-intervention survey and were excluded from the study. Another subject had to discontinue the study after the first week due to illness. A sixth subject dropped out after two weeks due to time constraints and a seventh participant was excluded from the study as she indicated in the post-questionnaire that she had skipped the mindfulness intervention four times. In total, seven participants were therefore not included in the study further. Finally, as indicated in Table 1, 14 subjects participated in the study, nine of whom were female and five males, ranging in age from 21 to 45 years old ($M = 28.36$, SD = 6.51).

On average, subjects worked 38 hours per week ($M = 38.29$; SD = 3.58). Two of the participants reported that they performed the mindfulness intervention before work, ten participants indicated that they completed the mindfulness intervention during their break from work (as recommended by the researchers before the study) and two participants completed the mindfulness intervention after their daily work. Of the fourteen participants, three participants (21.4%) had prior experience with mindfulness, while the other eleven participants (78.6%) indicated that they had no experience.

An independent samples *t*-test indicated that there were no significant differences in mindfulness scores between participants with previous mindfulness experience ($M = 2.67$, SD = 0.19) and those without ($M = 2.67$, SD = 0.47) in this sample ($t(12) = 0.00$, $p = 1.00$ [two-tailed]). An independent samples *t*-test revealed that there were also no significant differences in occupational stress scores between participants with previous experience of mindfulness ($M = 4.08$, SD = 1.05) and those without ($M = 3.88$, SD = 0.55) in this sample ($t(12) = -0.486$, $p = 0.636$ [two-tailed]).

As shown in Table 2, before the intervention, respondents most strongly agreed with the statement "I often rush through my work activities without really being aware of what I am doing". The lowest score before the intervention was given to the statement "I pay attention to sensations, such as the wind in my hair or sun on my face". The item "I am patient with myself and with others" was the highest rated after completion of the mindfulness intervention.

In regard to occupational stress, respondents most strongly agreed with the statement "I have trouble relaxing at work" before the mindfulness intervention. After participating in the mindfulness intervention, the highest score was measured on the statement "When I have stressful thoughts, I usually 'take a step back' and am aware of the thoughts without being consumed by it" as indicated in Table 3.

As indicated in Table 4, the highest pre-intervention rating regarding job satisfaction was given to the statement "I feel valued and affirmed at work", while after the mindfulness intervention, respondents most strongly agreed with the statement "I have the tools and resources to do my job well".

Testing for change between pre-and post-intervention scores

To determine the effects of the mindfulness intervention on occupational stress and job satisfaction, paired-samples *t*-tests were conducted with pre- and post-intervention outcomes as variables as shown in Table 5.

Mindfulness

Table 5 shows that mindfulness significantly increased from $M = 2.67$ to $M = 3.58$ between the measurement before and the one after the intervention ($t(13) = -11.93$; $p < 0.001$; $d = -2.267$).

Occupational stress

As indicated in Table 3, occupational stress significantly decreased from pre-intervention to post-intervention ($t(13) = 11.38$; $p < 0.001$; $d = 2.058$).

Job satisfaction

Job satisfaction significantly increased from pre-intervention to post-intervention ($t(13) = -5.32$; $p < 0.001$; $d = -1.044$).

TABLE 1: Characteristics of the sample

	Frequency	Per cent
Sex		
Female	9	64.0%
Male	5	36.0%
Working hours		
30	2	14.3%
38	2	14.3%
40	10	71.4%
Mindfulness training		
Before work	2	14.3%
During work	10	71.4%
After work	2	14.3%
Prior experience		
Yes	3	21.4%
No	11	78.6%

TABLE 2: Descriptive statistics for mindfulness

Item	Pre-intervention		Post-intervention	
	Mean	Standard deviation	Mean	Standard deviation
I pay attention to sensations, such as the wind in my hair or sun on my face.	1.86	0.66	3.07	0.73
I find it difficult to sustain focus.	3.29	0.99	2.43	0.76
When I have distressing thoughts, I just notice them and let them go.	2.21	0.80	3.57	0.51
When my attention is briefly diverted, I can easily refocus afterward.	2.64	0.84	3.29	0.73
While I am working, I often find myself daydreaming.	2.21	0.89	1.93	0.99
I often rush through my work activities without really being aware of what I am doing.	3.36	1.22	2.64	0.63
When I talk to my colleagues, I am aware of the emotions I am experiencing.	2.71	0.83	3.79	1.12
I feel connected to my experience here-and-now.	2.57	0.51	3.50	0.52
I am patient with myself and with others.	2.86	1.17	4.00	0.88

Conclusion

The affirmative results of this study imply that it has been an effective intervention to reduce occupational stress and increase job satisfaction in hospitality and service employees. The findings of this study confirm previously published scientific causal and correlational studies on the effectiveness of mindfulness in an organisational setting.

Discussion

Interpretation of the findings

Both organisational scholars and hospitality professionals have paid too little attention to individual-level mindfulness and its consequences for employees in the highly dynamic work environment of the hospitality industry. To rectify this omission, this study tested the effects of 15 days of mindfulness training integrated into the daily work routines of subjects who worked in different hospitality and service companies.

Results suggest that the intervention was successful and significant changes occurred in all variables analysed. Hospitality and service employees who participated in this study demonstrated increased mindfulness, decreased occupational stress and increased job satisfaction. As all hypothesised relationships were confirmed, this encourages further research on the potential impact of mindfulness on work and health-related benefits among hospitality and service workers.

Mindfulness

The majority of participants showed an increase in their ability to stay focused after the intervention, and they reported being able to let go of stressful thoughts. This is consistent with Karlin's (2018) findings that employees had higher levels of energy and increased levels of concentration after a mindfulness intervention. Furthermore, this result is also in line with the findings of Buchheld and Walach (2004), who describe that mindfulness is characterised by a non-judgmental attitude towards perceived thoughts without being emotionally or intellectually distorted by them, making it easier to let go of negative thought patterns. The post-intervention evaluation statistics of this study further showed an increase in improved refocusing when general distractions occurred, supporting the claim that mindfulness increases cognitive flexibility and thus protects against distractions (Zeidan et al., 2010). Furthermore, participants exhibited a higher form of general self-regulation by being more intensely aware of themselves and their surroundings, for instance becoming more aware of their emotions when interacting with colleagues and feeling less rushed through work activities. This

TABLE 3: Descriptive statistics for occupational stress

Item	Pre-intervention		Post-intervention	
	Mean	Standard deviation	Mean	Standard deviation
I often feel tense or stressed during the workday.	3.86	0.86	2.93	0.48
I often feel pressure from deadlines.	3.93	0.83	3.00	0.56
I have trouble relaxing at work.	4.14	0.86	2.64	0.49
I feel mentally exhausted due to the high workload.	3.86	0.86	2.57	0.65
I experience moments of inner calm and serenity, even when things get hectic and stressful at work.	2.00	0.68	3.71	0.73
When I have stressful thoughts, I usually "take a step back" and am aware of the thoughts without being consumed by them.	1.93	0.62	4.14	0.66
I can calm down quickly after experiencing stressful thoughts and impulses.	2.14	0.86	3.43	0.85
My mind is at ease while working.	2.36	1.01	3.14	0.66

TABLE 4: Descriptive statistics for job satisfaction

Item	Pre-intervention		Post-intervention	
	Mean	Standard deviation	Mean	Standard deviation
I feel positive and excited about my work most days.	3.50	0.65	4.07	0.62
My job fulfils me.	2.71	0.91	3.36	0.49
I look forward to going to work on Monday morning.	3.00	0.56	3.57	0.51
I have the tools and resources to do my job well.	3.57	0.65	4.29	0.61
I feel valued and affirmed at work.	3.71	0.83	4.14	0.66
I never think about quitting my job.	3.07	0.92	3.57	0.65
I have energy at the end of each workday to engage in personal interests.	2.93	0.99	3.71	0.47

TABLE 5: Pre- and post-intervention scores for mindfulness, occupational stress and job satisfaction

Variable	Mean	Standard deviation	*t*-value	*p*-value	Effect size
Mindfulness pre-intervention	2.67	0.42			
Mindfulness post-intervention	3.58	0.24	−11.93	<0.001	−2.267
Occupational stress pre-interventio	3.92	0.64			
Occupational stress post-intervention	2.59	0.33	11.38	<0.001	2.058
Job satisfaction pre-interventio	3.21	0.61			
Job satisfaction post-intervention	3.82	0.35	−5.32	<0.001	−1.044

finding is supported by Shapiro et al. (2006), who identified that mindful individuals are capable of higher self-regulation.

Occupational stress

From previous literature, the most reported psychological benefit of mindfulness was stress reduction. And indeed, occupational stress showed the highest downward effect from pre- to post-intervention. A reduction in the experience of stress during employees' daily activities was noted, supporting the finding that mindfulness-based practices are effective in reducing employee stress and strain (Martín-Asuero & García-Banda, 2010; Roeser et al., 2013; Allen et al., 2015; Bostock et al., 2018). In addition, higher self-regulation was observed post intervention, as employees indicated calming down more quickly when confronted with stressful thoughts and impulses. The study participants also indicated that they perceived the pressure of deadlines and the general workload to be lower. This supports the claim of Hülsheger et al. (2013) that the application of mindfulness can prevent and reduce emotional exhaustion, especially among workers in emotionally demanding jobs. In line with the hypothesis of Shapiro et al. (2006), this finding also suggests that individuals who exhibit higher levels of mindfulness can adapt more effectively to stressful situations at work and thus experience less pressure.

In addition to an increase in self-awareness and self-regulation, results also showed that participants displayed higher resilience than before the intervention, for instance by experiencing more frequent periods of inner calm, even in hectic and stressful situations. This is in line with the findings of the waitlist-controlled study by Nadler et al. (2020) in which participants in an eight-week mindfulness intervention noted a statistically significant increase in resilience compared to the control group.

Job satisfaction

The mindfulness intervention increased job satisfaction among hospitality and service employees. Employees reported feeling more positive and enthusiastic in their day-to-day work, confirming Hülsheger et al.'s (2013) finding that mindful individuals experience higher job satisfaction. Furthermore, an increase was found in the perception of having the necessary resources to perform well at work, indicating a higher level of satisfaction with their work environment, even if nothing objectively changed externally. This could also indicate that the employees' resources changed as a result of the mindfulness intervention, and they transferred this to their external circumstances. Shapiro et al. (2006) previously described that increased job satisfaction is achieved because the practice of mindfulness leads to automated routines becoming less frequent and individuals getting back in touch with their basic values and needs. Another important finding of the study is that employees reported thinking less about changing jobs after the intervention. Thus, it appears that increased job satisfaction is a strong indicator of intentions to change (Chaskalson, 2011; Chen et al., 2011). Mindfulness has therefore been shown to be negatively associated with turnover intentions, as reported by Andrews et al. (2014).

Limitations

Given some limitations in the study design presented, which are important to consider for an overall evaluation, the results should be interpreted with caution. These limitations to a sufficient interpretation of the results arise from the weaknesses of the study.

Self-report data collection method

It should be noted that the results are subject to methodological limitations. The one potentially problematic aspect is the chosen method of data collection, which in turn may have affected the reliability of the study. The only data collected in this research study was based on self-assessment. Although self-assessment is primarily used to measure acquisition cognition, it can lead to systematic judgment bias in response behaviour.

Homogeneity of sample

Another consideration that invites cautious interpretation is the characteristics of the sample. It is critical to note that this study is based on an extremely small sample. Furthermore, especially about the generalisability of the results, it should be emphasised that women are overrepresented in the study, and possible self-selection influences cannot be excluded. The sample has a young average age of 28 years, which indicates a high proportion of young professionals and students. Respondents in the age groups above 35 years old are almost not represented at all. This could be due to the format of the survey. Participation in the survey required internet access and a certain level of technical knowledge to get access to the mindfulness programme, which may ultimately have been an obstacle to reaching an older target group.

No control group

Due to the small sample size, no control group was included in the project. As this was an experimental research design, this is a limitation of the study as the inclusion of a control group, as a basis for comparison, would have enabled a demonstration of a more credible cause and effect relationship.

Non-randomised sample

Another limitation to the internal validity of this study is that the subjects were self-selected by the researchers. Therefore, it should be noted that without a control group, there is a possibility that the individual motivation of each subject may have an impact on the results.

Participant bias

At the beginning of the study, all participants were informed in detail about the procedure and background of the study. Participants may have anticipated that a positive cause-and-effect relationship on the dependent variables was sought through the mindfulness intervention. This assumption may have manipulated their results in the post-assessment.

No longitudinal study design

As this was a short-term intervention of 15 working days and only two data collection points, potential long-term effects were not assessed. However, the results indicate that positive changes can be achieved even within a short time.

Non-validated questionnaire

A self-constructed questionnaire by the researchers was used to measure effectiveness, and all items examined were based on previously published and reviewed questionnaires on mindfulness, occupational stress and job satisfaction, and were replicated almost identically. However, the questionnaire as

used in the present study has never been used in this form in scientific research and is therefore not validated. No reference values exist.

Recommendations for further research

The study included a relatively small sample and data collection was based only on self-reported survey data. In future studies, we recommend extending the research design in the following ways: include a larger and more heterogeneous sample; apply a randomised control group design to enable more valid conclusions about experimental effects; consider using a longitudinal design to compare short-term and long-term effects of the intervention; use a more diverse set of outcome measurements, including physiological indicators; and implement a combination of qualitative and quantitative research methods to collect a comprehensive data set that will enrich the overall analysis. As a qualitative research method, interviews should be applied to better assess the experiences and behaviour of the subjects over time, in addition to quantitative research such as a self-assessment questionnaire. In addition, more background information on participants would enable a more differentiated analysis of the impact of the mindfulness intervention for people with different personality profiles or in distinct positions.

Implications for business practice

This project has shown that a mindfulness intervention, in a relatively short time, with little effort and flexibly integrated into the daily work routine, can benefit hospitality and service workers. Hospitality companies should therefore consider incorporating the concept of mindfulness into their human resources policies, in attempting to minimise stress, increase job satisfaction and consequently decrease employee turnover.

As hospitality managers have a pivotal role in managing and promoting the mental and physical health of their workforce, they are strongly recommended to implement mindfulness programmes as part of their employee development strategy. It is suggested that an individualised one- to two-month, sponsored mindfulness training session for all employees be introduced, regardless of which department or position they work in. Each manager should be responsible for promoting the mindfulness programme in their department. Such top-down initiatives foster employees' interpersonal skills to open up and be more attentive so that overwork and the accompanying stress and job dissatisfaction have fewer chances of occurring in the first place. Depending on the financial resources of the company, the mindfulness intervention can either be implemented at low cost, for instance via certain online streaming platforms such as *Spotify*, or more cost-intensive measures can be initiated, such as in cooperation with mindfulness trainers who can conduct the training on site with the employees. Further, it would be reasonable to offer employees an online tool on the respective communication channels or intranet of the company that contains all relevant information on the topic of mindfulness and how to carry out certain exercises. Employees can thus proactively inform themselves and have access to specific mindfulness exercises.

It is further recommended to implement measures by asking employees to complete a self-assessment questionnaire on mindfulness, occupational stress and job satisfaction, in addition to regular feedback or appraisal meetings with their respective managers. Regular changes in the above factors could thus be monitored. In conjunction with regular feedback meetings, the manager could identify negative developments early on and take appropriate actions.

Hospitality workers are recommended to use mindfulness as a toolbox to enhance their well-being and find ways to become more satisfied in their daily work. Incorporating a 15 to 30-minute mindfulness training session into the daily work routine in a noise-free environment should be done consistently and daily on their own initiative.

Mindfulness training should be part of hospitality management education programmes. This would provide early orientation for students and young professionals and draw general attention to the importance of the topic. Through the awareness created, young professionals would have access to this resource to combat stress and dissatisfaction at an early stage in their careers.

Conclusion

The results of this study indicate that mindfulness activities are effective in reducing occupational stress and increasing job satisfaction of hospitality and service employees. The findings of this study confirm previously published scientific studies on the effectiveness of mindfulness in an organisational setting. Occupational stress in the workplace harms the health and well-being of many employees, their productivity, and their overall job satisfaction. Therefore, a mindfulness programme can be an effective intervention to equip employees with the tools and knowledge to strengthen their psychological well-being while reducing employee turnover in the workplace.

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Exploring the impact of rebranding on stakeholders: a case study of Hotel Management School NHL Stenden

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ABSTRACT: The purpose of this study is to provide a better insight into the impact of rebranding on stakeholders; the case for this study is the rebranding of the Hotel Management School (HMS). This research has explored how the stakeholders have experienced rebranding and how the rebranding has affected the brand identity, image and loyalty. A qualitative research method was used and data was gathered conducting semi-structured, face-to-face interviews with the students, staff and industry partners. The data illustrates that due to effective internal communication the employees were not affected by the rebranding. Nevertheless, the brand identity, image and loyalty did not have the same effect on the students and industry partners. Thus, it is recommended that HMS pay more attention to improving the communication, rebuilding and expansion of the brand identity.

KEYWORDS: brand identity, brand image, brand loyalty, communication

Introduction

A brand is a name, term, sign or symbol that identifies the maker or seller of a product (Armstrong et al., 2017). The act of using brand names for advertising and communication with stakeholders is corporate branding (Bhasin, 2019). A successful brand is expected to have a personality and a vision of the world. 21st century brand communication dynamics are different due to shifts in consumer perceptions (Barnham, 2008) and organisations frequently consider refreshing their brand. Hence, countless companies consider rebranding. Rebranding can be defined as creating a new personality by developing a new brand name, logo, symbol, or design (Plewa et al., 2011). The objective of rebranding is often "the creation of a new name, term, symbol, design, or a combination of those, for an established brand to develop a differentiated or new position in the mind of stakeholders and competitors" (Muzellec & Lambkin, 2006, p. 805). As a result, rebranding can range from a small makeover to significant changes such as changing a strategy or even a company name. Furthermore, a brand has a portfolio of meanings, sensations and emotions that are established between a customer and a company (Iglesias & Ind, 2020) and rebranding would subsequently mean a change in this portfolio as well.

The reason why so many companies rebrand could be changing factors concerning their consumers' image of the brand. Moreover, changing the name of an organisation and the brand influences an organisation's brand (Williams, 2012). Researchers have written about rebranding, yet there has not been much research about the stakeholders' opinions, feelings and experiences of rebranding and whether rebranding affects brand identity, image and loyalty. Thus, this study focuses on these specific aspects.

The Hotel Management School (HMS), a brand of the NHL Stenden University of Applied Sciences in Leeuwarden, the Netherlands, is one of the largest hotel schools in Europe. The school offers different programmes, such as a Bachelor's degree, an Associate degree, a Work and Study degree, and a Master's degree. The education is highly regarded, which led it being awarded with the "TOP Opleiding Keuzegids 2021" [Top Education Choice Guide]. HMS is among the best programmes in higher education in the Netherlands. Besides this, HMS is one of the most diverse hotel schools in Europe with more than 3 000 students of more than 50 nationalities.

HMS also offers Associate degree education in another location in the Netherlands, Emmen. For this research, the focus is the Leeuwarden main brand. Third-year students of the bachelor programme have the unique possibility to follow two modules or minors in other locations in the Netherlands or abroad. The options for going abroad are to go on exchange to one of 150 schools in 40 countries, go to another higher education institution in the Netherlands, or go to one of the five campus sites connected with HMS. Hotel Management School was formerly known as the school for International Hotel Management of Stenden University of Applied Sciences before the merger of both NHL and Stenden Universities of Applied Sciences in 2018. After the merger in 2018, it rebranded itself and became the Stenden Hotel Management School of NHL Stenden. On 8 February 2021, Hotel Management School (HMS) announced a rebranding. This rebranding had several consequences and changes for HMS's

employees, (current and future) students and industry partners. The changes and consequences are examined in this research.

The first step of the rebranding was changing the name. Previously the school was called "Stenden Hotel Management School", and has changed to "Hotel Management School NHL Stenden". Because of the rebranding, HMS became a sub-brand of the brand NHL Stenden. Besides the new name, the school also changed its appearance by creating a new identity, including a new logo, a new colour palette, a new website and a new educational concept. As a consequence of this rebranding, many students, employees and industry partners have become familiar with the new brand identity. Thus, this study investigates the impact of rebranding on these three stakeholders.

This research aims to determine the opinions, feelings and experiences of the rebranding of HMS on the key players or dominant stakeholders who must be given key consideration (Cornelissen, 2020) as well as the effect on these stakeholders regarding the brand identity, image and loyalty. Next, it could be interesting for HMS's future to gain an insight into how the stakeholders think about the new sub-brand and how they have experienced the changes so far. Therefore, this research explores the impact of the rebranding of Hotel Management School NHL Stenden on its stakeholders. This study focus is on brand identity, brand image and brand loyalty.

The problem statement for this study is: "Exploring the impact of the rebranding of Hotel Management School NHL Stenden on its stakeholders". The research questions for this research are focused on the following subtopics:

RQ1: How did the stakeholders of Hotel Management School NHL Stenden experience rebranding?
RQ2: Does the rebranding of Hotel Management School NHL Stenden affect brand identity?
RQ3: Does the rebranding of Hotel Management School NHL Stenden affect the brand image?
RQ4: Does the rebranding of Hotel Management School NHL Stenden affect brand loyalty?

Literature review

Brand identity

Brand identity comprises the core values, visions and beliefs of a company. It communicates the purpose, principles, related background issues and ambitions of the brand (Kapferer, 2008). Brand identity is described as an identity that originates from a single source and is communicated to the product through symbols and messages as a non-visible element (Kazemi et al., 2013). In addition, the researchers state that a brand's identity defines its core and authenticity. A brand becomes a channel through which we can connect with consumers and identify ourselves concerning other brands. A brand is a living identity that allows a company to act in the short and long term (Barbu, 2016). If a company or organisation wants to establish a long-term image, it must first establish a brand identity. After that, a brand image can be generated based on the brand identity. So, brand identity is one of the most essential things for an organisation (Kazemi et al., 2013). That is why these two topics are being explored, as they could change positively or negatively through rebranding. This change could have consequences for HMS as a sub-brand. An organisation's identification is the most important, distinguishing and long-lasting feature it has (Barbu, 2016).

Companies try to reveal their true identity to the general public for the following well-known reasons: increasing sales and creating a more attractive image. Brand identity supports positioning by allowing brands to identify themselves by comparisons to other brands (Barbu, 2016). Therefore, HMS must establish a strong brand identity to have a good position compared to their competitors. The better the brand identity of HMS is presented, the more attractive it will be for the students and the future students it will reach. With a strong brand identity, more employees will be proud representatives of the brand and the brand will continue to make positive impressions in the hospitality industry.

Brand image

How a brand is perceived and decoded is a result of communication sent by that brand to consumers (Kapferer, 2008). A brand image will be created after a brand identity has been established and brand image can be defined as the consumer's impression of the brand's connections, evocations and meanings. To create this brand image, the initiator of an organisation or company creates and projects an image to the general public. In addition, the brand image is the public's view of the brand (Barbu, 2016). So, it is essential to examine whether the public's view is the same as before or has changed due to the rebranding of HMS.

The picture is what others think about us, while the personality is what we feel about ourselves. The public's perception of the brand rewards the initiative to reveal the identity. The brand image should, in theory, be as similar as possible to the one wanted by the company. Attempts to enforce the new identity often face opposition (Barbu, 2016). Hence, this research will investigate whether HMS conveys the correct perception of the brand to the public.

Brand loyalty

Brand loyalty is characterised as a customer's behaviour or attitude toward their purchase intention for a particular brand (Worlu & Ahmad, 2019). Multiple factors could affect brand loyalty. First of all, rebranding a company's name or some other part of the business is seen as a factor that can affect brand loyalty positively or negatively, depending on the situation (Worlu & Ahmad, 2019). HMS has also changed its name, so HMS's task is to make sure this is positively changed. Second, changing the logo could affect brand loyalty. Specifically, different degrees of logo modification (evolutionary and revolutionary redesign) would affect brand loyalty (Titi & Anang, 2018). However, if the difference between the old logo and the new logo is not as noticeable, the impact is reduced or eliminated (Ha et al., 2011). HMS has radically changed its logo: the old brand "Stenden Hotel Management School" had a blue swallow as its logo. The new brand HMS has a pink logo with a block around the name. Therefore, the difference is significant and the impact can also have substantial consequences.

Research has shown that customers are more likely to embrace a new brand if the visual identities are similar to the old brand (Bamfo et al., 2018). Besides that, rebranding can also negatively impact brand loyalty due to modifications in core values initially introduced to the consumer (Bamfo et al., 2018). Next to that, without anything new to give, rebranding a logo in the name of aesthetics may not be very effective (Goi & Goi, 2011). The values of HMS remain the same, namely offering high-quality education at the same location with the same employees. By researching

the effect of rebranding on brand loyalty, one can understand whether brand loyalty has changed and whether this is positive or negative.

Rebranding

Rebranding can be defined as creating a new personality by developing a new brand name, logo, symbol, or design. Researchers claim that rebranding aims to create a new position for the organisation or company in the market and create change in an organisation (Plewa et al., 2011). For example, HMS has opted for rebranding to better link up with the main brand (NHL Stenden) and improve its position, as seen in this research. Namely, rebranding aims to reposition an organisation or company by creating a new identity aligned with its goals. In addition, the effectiveness of rebranding depends on aligning the name and logo as soon as possible (Barbu, 2016). HMS has done this by changing the name and incorporating this into a new logo that matches the main brand.

One of the reasons for rebranding could be changes in an organisation, or a company's internal and external environments (Prakash, 2012). After NHL and Stenden merged, there was a change in the internal and external environment. The merger is, therefore, the main reason for the rebranding. In such instances, a metamorphosis — a process that transforms a brand's image — occurs (Plewa et al., 2011). Furthermore, the changes in the image are both radical and widespread (Mróz-Gorgoń & Szymański, 2018). When a company or organisation undergoes such a metamorphosis, a new brand must also be more appealing than the old one, and consumers must feel linked to the location where services are offered, thus, such a broad and radical change in the brand image is essential to investigate properly (Collange, 2015). The brand image of HMS should become more attractive and more robust than the former Stenden Hotel Management School brand. In addition, the connection with the location and services must be maintained.

There are also multiple disadvantages of rebranding an organisation or company. First of all, a brand can lose the reputation and loyalty it has built up. Previously, Stenden had a strong brand called "Stenden Hotel Management School". If the rebranding is not carried out properly, there is a risk of losing its brand identity, brand image and brand loyalty. Moreover, if the reputation and value it has built up is lost, this may result in fewer students, less revenue and less staff. Secondly, there could be a possibility that the stakeholders no longer agree with the new brand. If the stakeholders of HMS no longer agree with the new brand, brand loyalty can be in danger. That is why it is essential to investigate what the rebranding of HMS does to their brand loyalty, to make sure that the stakeholders agree with the new brand and if anything should be changed to keep these stakeholders satisfied. Thirdly, rebranding can also cost a lot of time and money (Goi & Goi, 2011). If rebranding fails, it could have severe consequences for the company or organisation, damaging its brand image (Williams et al., 2021). The reasons for rebranding must be carefully considered since rebranding is not a simple or inexpensive undertaking (Goi & Goi, 2011). For that reason, the brand image, brand identity and brand loyalty should be adequately investigated. If the rebranding is not carried out properly, one or more of these factors could be negatively affected, resulting in severe consequences. By adequately investigating these factors, damage can be prevented, and aspects could be adjusted before it is too late.

Stakeholders during a rebranding

Research has attempted to gain a better understanding of rebranding by measuring induced cognitive and emotional responses (Peterson et al., 2015) and assessing acceptance or resistance to a rebranded organisation or company (Collange & Bonache, 2015). Prior research on rebranding has established the importance of recognising the various stakeholder groups impacted by a company's rebranding (Miller & Merrilees, 2013). Nonetheless, on the one hand, most of the literature on rebranding has focused on managers' behaviour or customer expectations (Tarnovskaya & Biedenbach, 2018). Since it has shown that indicating different stakeholder groups is essential for the rebranding, three different such groups of stakeholders were interviewed for this study, namely students, employees and industry partners. On the other hand, few studies have discussed rebranding failures in this research field (Tarnovskaya & Biedenbach, 2018). Studies that integrate multiple stakeholders' viewpoints and understand how interactions between them can influence the outcome of rebranding are lacking in this field of study (Tarnovskaya & Biedenbach, 2018). Therefore, the opinions and experiences of the stakeholders of HMS were carefully explored and represented. As a result, the outcome of the rebranding can be positively influenced, and the various stakeholders and brand loyalty can be promoted for the new brand. Lastly, an additional obstacle for effective rebranding implementation could be brand identity differences among multiple stakeholders (Wilson et al., 2014). Hence, the intent is to avoid these obstacles by clearly representing the different opinions of the stakeholders of HMS.

Branding of higher education

Multiple studies, such as Williams and Omar (2014), Hemsley-Brown et al. (2016), Rachmadhani et al. (2018) and Esteky and Kalati (2021), have been done on the effect of branding on higher education. Each of them demonstrates that higher education prestige is an essential factor in determining the uniqueness of higher education. However, the adoption of concepts such as brand identity, brand image and brand loyalty is becoming increasingly important with the rise of branding. In addition, this is the reason why organisations are eager to create distinctive university logos, recognise multiple definitions held by stakeholders, strengthen recognisable imagery and enhance credibility in this increasingly competitive global world (Hemsley-Brown et al., 2016).

HMS has been awarded "TOP Opleiding Keuzegids 2021" [Top Education Choice Guide], which means that HMS belongs to the best higher education programmes of 2021 in the Netherlands. However, this award is not enough to be unique. That is why HMS needs to rebuild a strong identity and strengthen HMS's brand image to be competitive with other hotel management schools. Before students enrol in higher education, they shape their conceptions of brand image, brand identity and meaning, which they maintain during their studies and even after graduation (Dennis et al., 2016). That is the reason why HMS needs to promote the sub-brand. Establishing a solid brand identity and brand image will have positive consequences for the brand loyalty of HMS. Next, the more appealing the university's brand is to students, the greater their identification is, resulting in common interests, identities and beliefs between the university and the students. However, their ability to

understand the university's brand depends on how the university communicates it (Hemsley-Brown et al., 2016). A university's continuation depends on the quality of its students, which has an equal effect on brand recognition (Rachmadhani et al., 2018). So, one of the essential things for higher education is the proper way of communicating its brand in such a way that students can identify with it. The marketing of HMS is therefore essential to get high-quality students. More marketing increases brand awareness, which results in an improvement of the brand image. The greater the identification with HMS, the higher the brand identity, resulting in more brand loyalty.

Conceptual model

The conceptual model is used to give an overview of the literature review. This will aid in answering the problem statement and research questions (Figure 1).

Research method

We applied inductive theory to examine the topic and decided to adopt the interpretivism paradigm, and the ontology is based on constructivism. The qualitative method has been chosen for this study and, as an instrument, interviews were used to find the answers to the problem statement and research questions. The data from the interviews were analysed to see if the rebranding affected the brand identity, brand image and brand loyalty and to find out what the stakeholders' experiences were in the rebranding of HMS. Research questions for this research were gathered with eight in-depth semi-structured interviews. The population and the participants for these interviews were students, employees and industry partners involved in HMS. They were invited via e-mail, and the interviews took place via Microsoft Teams. The first group were the students studying for a Bachelor's degree at HMS. The second group of stakeholders were employees working at HMS. The third group of stakeholders were HMS's industry partners.

The procedure of collecting the interviews was done via e-mail. The participants received an invitation e-mail, including a participant information sheet and a consent form. The participation information sheet included the topic description of the research, the purpose for doing this research and how their privacy was protected. Furthermore, the consent form entailed an agreement, followed by place for the participant's signature. The participants were asked if the interview could be recorded for later review and analysis. After creating the transcript in English and Dutch, the recording was deleted. Lastly, the names, age, origin, etc. were not mentioned in the transcribed interviews to protect the participants' privacy. To process interviews, a coding process was used to analyse the data. The coding process was conducted in five steps: preparation, reading, open coding, axial coding and selective coding. The outcome of the coding steps formed the base and structure of the findings.

Results

Students

A total of three students, three HMS employees, and two industry partners were interviewed. The interviewer made use of a semi-structured interview guide. The open coding led to the main codes "effectiveness of communication", "consequences of COVID-19", "brand identity" "brand loyalty" and "brand image". Axial codes generally acknowledged by students were "impact of communication" and "recognition". Axial codes analysed in the employee stakeholders were "identity", "impact" and "image". Whereas the axial code most highly recognised in the analysis of interviews with industry partners was "impact of communication". Topics discussed in this section are based on selective coding.

First, the students' results are presented by looking at the effectiveness of communication. The students were asked what they thought about the rebranding announcement of HMS. All students did not notice the announcement as one of the students pointed out:

> *I did not notice the message at all. We received so many e-mails from school that I did not open them. I*

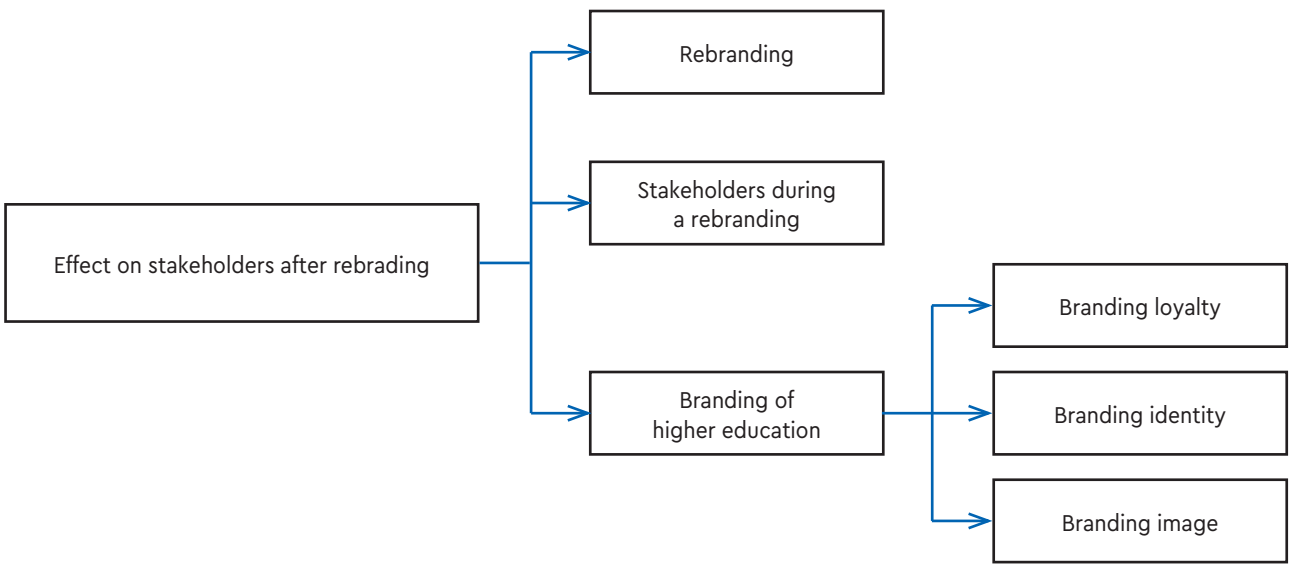

FIGURE 1: Conceptual model

think that just one e-mail is not enough to announce something with such a big impact.

The students felt ill-informed, which resulted in the fact that the students had no idea what the rebranding entailed.

Even though the students had no idea about the rebranding, they were asked what they thought about the reason or purpose for the rebranding: "*Maybe the fusion with NHL Stenden, but I am not sure…However, it is just guessing since the reasons are not mentioned to us"*.

Students highlighted that communication could be improved and HMS should inform the students more since one e-mail could be easily missed. Also, they would like to know the actual reason behind the rebranding. In addition, the students were also asked about things that should be changed or should be done differently:

…I would inform all the students from each school year about the rebranding. For example, give a presentation about what has changed and especially the main reasons behind it. Now, I hear many negativities around me of students complaining about new changes or lack of clarity. I think you will gain a lot of positivity when everyone informs you aptly.

HMS could have informed the students in a different way. If this is carried out, negativity can turn into positivity. Besides that, there is also mentioned that HMS could become more professional if everyone used the same name and logo. If this happens, everyone at HMS will promote the same identity, resulting in a more professional attitude. This consistency is necessary since many students and lecturers still use the old brand in presentations and e-mails.

Employees

Employees of HMS were asked how the rebranding was communicated internally. All employees gave the same answer, namely HMS announced the rebranding regularly via the "coffee break meeting" (weekly meeting with all the staff) and multiple times via the newsletter employees receive weekly. Furthermore, all employees confirmed that they had been informed enough and that the information received was clear. Additionally, good internal communication was confirmed by the following answer to the question about what the reason was for the rebranding:

Well, I think there are multiple reasons…but the main reason is becoming part of the main brand (NHL Stenden) and that we are becoming a sub-brand. This is well communicated.

This quote shows good internal communication with the employees. Good communication is vital for this study to compare this way of communicating with other stakeholder groups.

Industry partners

Lastly, the results of the industry partners about the effectiveness of the communication will be discussed. The industry partners were asked how HMS communicated its rebranding with their company. Two interesting answers were given: "*Well, I am somehow involved in HMS. I heard about it that way. However, they have not announced anything to my company*".

Well, they did not communicate a rebranding to our company. So, to be honest, I am not sure if I can do this interview with you. I also have contact with many other companies in the region, and they are also not aware of the rebranding.

Since the industry partners were not informed, it became more challenging to continue the interviews. However, they were continued, as they could result in more interesting recommendations for HMS. On the other hand, not all the questions could be asked since the participants could not answer them.

Further, all participants were asked what they thought the reason or purpose was for the rebranding. One industry partner had no idea about rebranding and could not answer the question. However, the other participant, who is somehow involved in HMS, mentioned multiple reasons for the rebranding:

It has become clear to me that one of the reasons is the fusion and strengthening the position with a whole new appearance. Nevertheless, again, they did not mention this to my company.

Both industry partners agree that HMS should communicate more and inform all the industry partners about rebranding and significant future changes. According to one of the industry partners, poor communication has resulted in a negative brand image for HMS. Lastly, the industry partners were asked if they think the changes made by the rebranding will affect brand loyalty. The answers differ, but they come down to the same solution, namely to improve communication:

I think if they communicate their identity better, this will positively affect the image of HMS, and it could bring the industry and HMS closer together, which increases the loyalty.

It could become negative since they are not communicating with us.

HMS could improve the external communication with industry partners. If not, it could negatively affect brand loyalty.

Consequences of COVID-19

The COVID-19 pandemic has been with us for nearly two years now. Therefore, it is not surprising that several participants mention this theme in their answers.

Students

All the interviewed students mentioned that they did not see the rebranding changes in, for example, the school building because of the online education they had had for one and a half years.

Well, I saw it when I got back to school again (physically) after one and a half years of online education…but I did not notice it during the online education, so it was a bit of a surprise.

The COVID-19 pandemic has made communication with students more complex, which has resulted in the students feeling ill-informed.

Industry partners

One of the industry partners mentioned that the COVID-19 pandemic has negatively affected the brand image of HMS:

I think the image of hospitality management education, in general, is negative at the moment due to COVID-19. This can also be seen in the decrease in the number of students registering for hospitality management education. COVID-19 has shown that our industry can be insecure/uncertain. However, this has to do with COVID-19, not with the education itself…

Brand identity, brand image and brand loyalty

The following three themes are combined since they were often interrelated during the interviews.

Students

When the students came back to class, they saw the changes in physical expressions:

> *When I now walk in school, I see that the name and logo has changed on the banners. However, due to online education for so long, I had no clue at all.*

However, most of the students are optimistic about the new changes:

> *I like the new logo and the new colour palette they are using. I think the old colours were a bit too old. This is more 2021.*
>
> *It is good that our new name has the words "NHL Stenden" in it. In previous years, it felt like we were separated from the other academies since our name was "Stenden", and now it feels more like we are all studying at the same school. I think this is a good finalisation of the merger process.*

Most students like the new brand because of the changes mentioned above. However, one of the students said that they missed the old brand and regretted that the old one is gone. They think that people abroad may not be familiar with the brand anymore. HMS should monitor this by possibly investigating this sensitive aspect of rebranding.

The opinions about the brand image varied among the students. As the industry partners also mentioned, most students think the brand image has negatively changed due to poor communication. However, one student thinks it has positively changed since it is now future-proof. Furthermore, the students were asked whether they believe HMS will attract another type of student because of rebranding. The students believe the kind of student will remain the same.

> *Maybe more students since the whole appearance looks way better now, but not another type. Besides, HMS can become more attractive, especially for students who just graduated from secondary school and are doubting which education path to choose.*

However, another student thought it would attract fewer international students since they are no longer familiar with the brand. This unfamiliarity is something that HMS should monitor as this can have a negative effect. In addition, the students all agree that HMS should work to rebuild its identity. Especially for the external environment since there is a possibility that this group will not recognise the brand anymore. Furthermore, the following recommendation was given by one of the students:

> *I think HMS could profile themselves more like a school, not only for hotels and restaurants, but also as a school that is way more than that. I say this since 10–20% of the students continue working in the restaurant or hotel sector, but the other 80–90% go to another sector in the industry. I think if you would show this more in the identity, it could attract way more students.*

On top of that, all students agreed that the new identity should be communicated further than currently done. Students believe that if this happens, they can familiarise themselves with the new identity. Eventually, everyone will promote the same identity. The last question was whether students think HMS has to rebuild their brand loyalty. All students agree that brand loyalty will stay the same. However, the following sidenotes were made:

> *I think that alumni will not say that they are from Hotel Management School NHL Stenden. I think they are saying they are from Stenden.*

Nevertheless, the following student disagreed with this:

> *If you are talking to someone on the other side of the world, I think they will still recognise the Hotel Management School in Leeuwarden.*

Employees

The employees noticed some changes due to the rebranding, such as the new name, logo, banners and curriculum. Further, all three employees mentioned that HMS is profiling itself differently, which is more future-proof. That is why it is not surprising that all interviewed employees prefer the new brand instead of the old brand because it is future-proof. Even though the employees like the new brand, the following comment was made:

> *I prefer the new brand. However, I miss the old brand because I was so used to it. Nevertheless, the new brand is future-proof, and I like the new style.*

One of the employees mentioned that they miss the old brand, just as one of the students did. HMS should carefully investigate this in a follow-up study to determine if HMS paid sufficient attention to the emotional part of the rebranding. According to the employees, nothing has to change or should be done differently, confirming excellent internal communication. Not all employees were sure if the brand image was changed positively or negatively. Two employees thought that it is up to the future to decide, while another employee was certain about a positive change:

> *The brand image is positively changed. The rebranding showed so many changes, and it shows that we are assertive and have more guts than before. I think it is more extrovert, with an identity that shows that we are standing up for ourselves.*

The employees also think it is up to the future to figure out how HMS will attract another type of student. Moreover, the employees were asked if they believed HMS had to rebuild a new identity. Most of the employees thought HMS does not have to rebuild, but expand the brand identity:

> *I think we changed a lot in the identity, for example from the outside, what you can physically see (the image), but because of that, I think we changed ourselves as well, in a positive way. However, this will take some time. It will not change within a few days.*

So, the employees thought HMS should expand their identity. Here, a suitable recommendation can be made for HMS. The last question entailed whether employees believed that HMS should work to rebuild brand loyalty. Most employees thought HMS should not rebuild, but expand its brand loyalty.

> *I think, not rebuilding but expanding more. We have a new office for our industrial relations, and I think the rebranding with a new identity was perfect timing and it fits perfectly in this new office. This will help us in the right direction of expanding.'*

Industry partners

Both industry partners did not receive a message about the rebranding of HMS. However, one of the industry partners was informed about the rebranding, but not via their company. The industry partners were asked what they thought about these changes. It is somehow logical that both answers differ since one of the participants was (indirectly) informed, and the other industry partner was not:

> *I prefer the new brand. I think it is good that they are working to future-proof themselves. They are moving with the changes in the industry.*

The other industry partner had no opinion about the new changes. He stated that he was not aware of the recent changes. However, the other industry partner who was involved said the following:

> *I think HMS needs to show more what they have changed. Many industry partners are not aware yet of all the changes. I think HMS should start promoting its unique selling point. What does the school stand for, how are they unique and how does HMS do differently and better than other hotel schools in the Netherlands? I think they should especially strengthen their identity in this.*

Discussion

How did the stakeholders of the Hotel Management School NHL Stenden experience rebranding?

All students did not see the rebranding announcement of HMS. Students felt that they were not fully informed and the actual reason or purpose had not been conveyed. Because of that, the students barely noticed the rebranding and did not know what it entails due to limited communication by HMS in their view. Students felt they should be informed adequately because this could positively affect HMS. The internal communication with the students should be improved by informing students more about the rebranding and the reasons behind it.

On the other hand, looking at the employees, there was good internal communication about the rebranding, and the main reasons for the rebranding were clear. Both interviewed industry partners did not receive a rebranding announcement of HMS through their company. Both industry partners were left with a feeling of being insufficiently informed by HMS. If HMS does not improve communication with the industry partners in the future, it could risk losing its reputation and credibility. Hence, external communication should be improved by informing all industry partners about rebranding.

Does the rebranding of the Hotel Management School NHL Stenden affect brand identity?

Based on the results, it can be said that the internal communication with HMS employees was good. The new brand identity is clear, the reasons and purpose are well explained and the employees are optimistic about the new brand identity. However, it is recommended that HMS should expand its identity and show its unique selling point, aiming more at what the brand stands for and what makes HMS a better hospitality education institution than others in Europe. One of the industry partners (who is a little involved in HMS) agreed with this opinion. Since both industry partners did not know about the rebranding, there was no clear answer if the brand identity had changed. Both industry partners thought that HMS should enhance communication to develop a better relationship with the industry partners.

Due to COVID-19, students received online education for more than a year. Hence, they did not physically observe the changes in brand identity. Nevertheless, once they started attending classes on campus, they have started observing modifications, and most of the students liked the new brand identity. The students thought that the new brand identity is future-proof, which helps to finalise the merger. However, the students believed that the brand identity should be better communicated to familiarise themselves with the new identity to support the same brand identity. In addition, the students also agree with the employees and industry partners that HMS should rebuild and expand the brand identity. So, the rebranding has affected the brand identity of the industry partners. By improving communication, this could be solved.

Furthermore, the rebranding has not affected the brand identity of the employees, but they would like to expand the brand identity more. Lastly, the students were optimistic about the new brand identity. However, HMS communication should improve, and HMS should rebuild and expand the brand identity more. It will no longer negatively affect the brand identity if this is done.

Does the rebranding of the Hotel Management School NHL Stenden affect the brand image?

Most of the students and one of the industry partners thought the brand image had become more negative since the changes were not communicated sufficiently, from their perspective. Since changes in the brand image are radical and widespread (Mróz-Gorgoń & Szymański, 2018), it is important to communicate more with these stakeholders; otherwise, it could cause differences within various groups of stakeholders (Wilson et al., 2014). The employees were not sure yet if the brand image had changed. Employees thought the future will clarify this, and if HMS promotes the new brand more, it will positively change the brand image. Thus, the rebranding affected the brand image.

Does the rebranding of the Hotel Management School NHL Stenden affect brand loyalty?

The students did not think that rebranding affected brand loyalty. Students believed it would remain the same if HMS keeps in touch with the alumni. In addition, it could be that people will use the old brand name on the other side of the world; nevertheless, according to the students, this will take some time. For the employees, brand loyalty was not negatively changed due to the rebranding. However, students thought HMS should expand their brand loyalty by having more contacts worldwide. Brand loyalty has become negative for the industry partners since HMS did not communicate about the rebranding. It also appeared that some of the stakeholders were still missing the old brand. HMS needs to see if attention has been paid to the emotional part of the rebranding. So, the rebranding has not affected the brand loyalty of the students and employees, but it has affected the brand loyalty of the industry partners.

Exploring the impact of the rebranding of Hotel Management School NHL Stenden on their stakeholders

Comparing the conclusions of the research questions, it can be concluded that the rebranding has impacted the students and industry partners. The rebranding did not significantly affect

the employees, as there had been good internal communication about the new brand and changes. The answers to the research questions have shown significant differences in communication. First, the students were informed, but not enough from the students' point of view. The employees were, according to themselves, well informed, and the industry partners were inadequately informed. Properly informing the two stakeholder groups (students and industry partners) could avoid negative complaints and confusion. If this point of improvement is not carried out, higher education could risk losing the reputation and appreciation it has built up (Goi & Goi, 2011). If that happens, it will result in fewer students since they could hear from other students about the communication, resulting in less revenue and staff retention. All of this shows that HMS should keep the stakeholders satisfied. If not, the stakeholders will no longer agree with the brand (Goi & Goi, 2011). For that reason, it has been essential to do this research by correctly mapping the (emotional) feelings and experiences. If HMS does not react to these (emotional) feelings and experiences, it could have severe consequences for HMS's future.

Limitations and recommendations

This research was conducted during the COVID-19 pandemic, meaning that the interviews were held online (MS Teams). Working online made it more challenging to see the body language and expressions of the participants during the interview. Furthermore, it appeared that industry partners were not fully informed about the rebranding of HMS. For this reason, it was not easy to gain answers.

In addition, many factors have common ground and influence each other, such as brand identity, brand image, brand loyalty and feelings, experiences and communication. Considering that the network of stakeholders for HMS is large, this research had a small sample. Therefore results could have been compromised and should be seen merely as indicators.

From this study's purpose, findings and discussion, some suggestions for the business practice can be derived. HMS should communicate differently about the rebranding and increase external communication about the rebranding by highlighting significant future changes. It is essential to ensure everyone is using the new brand identity to ensure everybody is spreading the same identity. It is recommended to put more effort into developing a good quality connection between HMS and the industry partners. Finally, it is recommended to examine the emotional part of rebranding.

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DISCUSSION
PAPER

Working strategically with Big Data in the tourism sector: a qualitative study of twelve European destination management organisations

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ABSTRACT: This article presents the results of 12 semi-structured in-depth interviews with data experts from destination management organisations across Europe. The analysis revealed three overarching themes concerning the use of Big Data in the tourism sector: (1) size matters when it comes to utilising the information from Big Data sources – bigger is not perhaps better, but larger companies are more capable of harvesting the full potentials of the information; (2) companies lack the required competencies to work with Big Data strategically; and (3) one of the proposed solutions from the respondents was surprisingly a desire to share their data with the competitors thereby gaining a competitive leverage. Concluding on the above we suggest further areas for potential research: clarification of relevant competencies when working with Big Data, furthering collaboration between tourism companies to maximise the potential of sharing, and research into the effect on COVID-19 on Big Data and strategy.

KEYWORDS: DMO's, hospitality industry, strategy, leadership, Covid-19, competency development , HRM (Human Ressource Mangement)

Introduction

Big Data is without a doubt a pertinent topic in the current technological debate in the tourism and hospitality industry. Together with artificial intelligence (AI) and machine learning, Big Data is something that has an increasing influence on how many companies make their everyday decisions. It has also drawn the attention of scholars from various fields, and new knowledge on the topic is constantly being produced.

This discussion paper is written as a part of a research project running from 2020 to 2023. The purpose of the overall research project is to formulate a model which will enable companies from the tourism sector to understand how to transform the vast amount of information that is to be gained from numerous Big Data sources into something tangible on a strategic level.

The objective of this discussion article is to present the results of 12 in-depth interviews with various destination management organisations (DMOs) from across Europe about their current use of Big Data, and how they viewed the potential of using Big Data in a more strategic way going forward. This study focuses on the DMOs due to the overall strategic focus of the question frame, which we doubted that a single operator from the tourism industry would be able to answer sufficiently on their own.

Methodology

The overall research design of the project running from 2020 to 2023 is an *explanatory sequential mixed-methods* design rooted in the pragmatic worldview, combining both qualitative and quantitative sources. This article presents the *qualitative* results from 12 semi-structured interviews conducted with DMOs from across Europe from September to November 2020. As part of the interview process, all 12 respondents signed consent forms which allows for the use their full names and job positions in all types of publications. Due to COVID-19, and the ensuing traveling restrictions, all the interviews were conducted and recorded on Zoom and subsequently transcribed and analysed by the research team.

Initially, a list was compiled of 120 potential candidates from DMOs across Europe working with Big Data. Subsequently, the following criteria were applied to narrow down the number of respondents:

1) The respondent should have a minimum of five years of experience in the field of Big Data and strategy;
2) The DMO where they were employed should be *actively* working with Big Data as part of their business model; and
3) The study sought to include both smaller, medium and large DMOs from a variety of countries throughout Europe to obtain as wide a range of respondents as possible.

All 12 respondents interviewed met the requirements listed above and there was an equal distribution in terms of the size of DMOs. Of the 120 potential candidates contacted, 40 showed an interest in participating; however, 28 were excluded from the study as they did not meet the criteria for participation. Before moving on to the results of the interviews, we will give a definition of the term Big Data based on the prevailing research literature.

Definition of "Big Data"

In terms of the concept of "Big Data", a lot of research has been conducted over the past years, and Big Data is a concept that has been defined in various ways. However, it appears clear that there are similarities among different scholars' interpretations of the concept. In his review from 2016, Hilbert mentions three characteristics which describes the core of the Big Data concept. These characteristics are *volume, variety* and *velocity*.

Volume

The term Big Data is based on the understanding that a significant amount of data is being analysed and interpreted at any given moment. Hence, conclusions are based on a solid foundation of data (Hilbert, 2016). This viewpoint is supported by Chen et al. (2017, p. 425), who refer to Big Data as "datasets whose size is beyond the ability of typical database software tools to capture, store, manage, and analyse". Vinod (2016) adds another aspect to this perspective in the sense that Big Data volume should be seen as dynamic. For instance, his study in the travel industry suggests that the amount of data increases in time, based on consumer actions and purchase decisions.

Variety

Another important aspect when working with Big data is the fact that data is much more than numbers. Hilbert (2016) mentions data sources such as video, audio and text as valuable sources for gathering data. Some support for this perspective is given by Miah et al. (2017, p. 771), who state that "Big Data is characterized by its volume, velocity, variety" and Chen et al. (2017, p. 425) who say that Big Data "...can be generated through multiple information technologies and systems...".

Velocity

In addition to the perspectives of volume and variety, there is a shared understanding of the importance of velocity as a characteristic of Big Data. According to Kitchin and McArdle (2016), the term *velocity* means that data is produced in real-time. A contribution to this viewpoint is one of the most commonly cited definitions: "Big Data is high-volume, high-velocity and high-variety assets that demand effective, innovative forms of information processing for enhanced insight and decision making" (Hartmann et al., 2016, p. 1384).

Among scholars, there has been an addition to the definition and understanding of the Big Data concept. The fourth characteristic is *veracity*.

Veracity

This contains the perspective that data can be both messy and ambiguous (Kitchin & McArdle, 2016). The same perception of Big Data is mentioned in a study by Cheah and Wang (2017, p. 230), who argue: "With availability of consumer data at high volume, velocity, variety and veracity, new business opportunities are presented". Veracity deals with the uncertainty and reliability of a certain type of data.

In our question frame for the interviews presented in this study, and in the overall research project spanning from 2020 to 2023, the abovementioned four characteristics of Big Data have been used extensively to understand the nature of Big Data and how companies are working with Big Data on a strategic level.

Themes

Below we will present the findings from the interviews with the DMOs. We chose to divide them into three overall themes that were prevalent among the respondents: 1) size of the DMO and its effect on the usage of Big Data; 2) competencies (or lack of competencies) of the DMO; and 3) the benefits of sharing knowledge to counteract strategic disadvantages.

It is important to stress that these were not the only themes accentuated throughout the interviews. Issues such as lack of an overall strategy for handling Big Data, challenges concerning the General Data Protection Regulation (GDPR) that was instituted by the European Union as a way of protecting citizens' data (which was seen as an obstacle by several of the respondents) and using Big Data to enhance the company's sustainability efforts were also mentioned throughout the interviews. These topics were, however, more dispersed and had different meanings to the different respondents and thus were not considered to be overarching themes in this study.

Another noteworthy topic that could have been interesting to delve deeper into was COVID-19, which was mentioned several times as a potential gamechanger concerning the use of Big Data and the shift towards a more digitally driven DMO. However, none of the respondents had suggestions for how this could come about.

Theme number 1: size matters

The first major commonality among the respondents was the notion of size. The smaller DMOs are often not equipped with the right tools to handle the vast amount of data available. According to several of the respondents, most small to medium-sized DMOs choose to ignore the flow of information or use it minimally due to the lack of understanding of the data. The cost of hiring trained personnel or acquiring the expertise from external consultancy agencies dissuades them from doing more with the data they are able to obtain. It is thus not a lack of available data that prevents small to medium-sized DMOs from using Big Data, but rather a question of the necessary funds and competencies. Analysis of data requires trained personnel, and as mentioned before, this is usually not a viable option for small entities.

> *I think it links to the size of the company. Larger companies are more equipped to use data in their process and in their business. But of course, there are good examples of small businesses that do it as well, but we kind of see a line between the size of the business and to what extend they use data* (Dagný Hulda Jóhannsdóttir, managing director, Visit South Iceland, Iceland).

The competition from the large online travel agents (OTAs), and their ability to harvest and utilise Big Data because of their size, was a recurring theme throughout the interviews. The inherent digital nature of the OTAs has given them a head start due to their accumulation of data sources over a substantial period of time since the first OTA's entered the market from around 1995. Combined with their size, they pose a formidable challenge to small and medium-sized DMOs in terms of using Big Data to gain a strategic leverage.

Theme number 2: competencies

A considerable challenge for several of the interviewees was a lack of sufficient competencies in the company to collect and

process the vast amount of information flowing from Big Data sources. This was again connected to the size of the company as larger entities were seen as more likely to have the capacity to hire a specialist to work with collecting and processing data.

Andrew Sutherland, a tourism strategist at Visit Västerbotten in Sweden, explains what comes to mind when thinking about Big Data:

> *Competence, ability to understand what you're processing it for and what the value is. It's easy to get lost in the jungle and the swamp of data. I mean any form of analysing, it's particularly easy to get lost in there. No matter the usage, knowing exactly what you're looking for, milling through it and finding what you're looking for is such an important thing. So, your competence and experience and what you're looking for and value.*

Later in the interview, Andrew Sutherland elaborates on this issue and points specifically to the problem of size and competencies:

> *It is quite obvious that digitalisation and tourism and such is important, but the situation in the smaller and medium-sized company is quite different. There is a lot of need for skilled people and a new strategy.*

In summary: size matters when it comes to the ability to collect and process knowledge gained from Big Data sources. The larger the entity, the greater is the chance of having people with the right competencies present in the organization.

Theme number 3: sharing data

As a resource, Big Data can be valuable if used correctly. Sharing that resource with other stakeholders could hold numerous benefits, according to several of the respondents. The first one is decreasing the problem of usability for the smaller companies and DMOs.

> *For me, the main issue is to get people to understand that Big Data isn't valuable unless you use it. And actually, even sharing data enhances its value. If I speak in terms of challenges, that is when I speak to the people who finally become aware of Big Data and that it exists, and when they are told that it is valuable, they gather it and then they kind of hold it like a pot of gold and they sit on it, and that alone doesn't create value and they still do not understand that because "someone told me that it's valuable"* (Inga Rós Antoníusdóttir, Digital Development, Icelandic Tourist Board, Iceland).

Making data more obtainable in smaller but more targeted ways might be the way to optimise usage. Working with the data in-house and joining forces with other DMOs and tourism companies could be a feasible way to eliminate costs and promote sustainable advantage through mutual cooperation rather than competitiveness.

> *Using traditional ways of collecting data, combined with big data for the near future, I think more companies will start to do that, and especially if it's possible to do that in combination with other companies, like we've done...That's a development that is pretty new — that we are more willing to share data. More than we did, for example, 10 years ago, then we were only looking into the competitive advantage, never looking at, okay by sharing data we can obtain a competitive advantage, which is more or less a paradox* (Yvonne Cornax, Marketing Strategist, Visit Drenthe, the Netherlands).

Topics of interest for further research

When comparing the different themes, two of them stand out as obvious topics for further research:

1) If a recurring problem is that tourism companies fail to employ big data due to a lack of competencies (which, according to the respondents, seems to be related to the size of the company), more research into a clarification of the necessary competencies is needed. This is especially relevant in small to medium-sized tourism companies; and
2) Sharing — if there is a common consensus concerning the willingness to share data, this warrants further research into ways of collaboration between tourism companies.

In addition, as mentioned, quite a few respondents pointed to COVID-19 as a potential gamechanger in Big Data; however, without any indication of how this was to happen. When the dust settles, and the pandemic (hopefully) finally recedes in 2022/2023, this would be a most interesting topic to delve into further.

Conclusion

Initially, the prevailing research literature on the topic was used to define the term Big Data. Subsequently, we have presented some findings of the 12 interviews conducted with DMOs from across Europe. This yielded several interesting conclusions. However, three were paramount among the respondents: 1) size matters when it comes to utilising the potential of Big Data; 2) specific competencies are required to work with Big Data; and 3) several of the respondents accentuated the sharing of data with stakeholders as a possible way of harnessing the power of data sources. As suggested, further research on specifically "competencies" and "sharing" is warranted, together with the potential ramifications caused by COVID-19.

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DISCUSSION
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Creating sustainable competitive advantage in the hospitality industry through commercial friendships: connecting the host and guest on a social and emotional level

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ABSTRACT: A large part of quality and competitive advantage in hospitality comes from friendly service. A lot of research in the hospitality industry is done from the viewpoint of management and aimed at how businesses should be designed to be friendly, yet little research is done into the perspective of the guest to show if the design works. This article tries to start the discussion and drive research towards a better understanding on how interaction between a host and a guest could lead to a concept called Commercial Friendship (CF), which comes from a connection on an emotional and personal level. CF is known to be beneficial to marketing investments, yet little research is done on friendship in marketing in general and even less in the hospitality industry in particular. This article puts forward a conceptual framework grounded in theory from hospitality, marketing, psychology and experience design. Research questions are given along with new ways to do research in hospitality design using a combination of verbal, behavioral and psychophysical measures.

Keywords: commercial friendship, experience design, guest behavior, human interaction, neuromarketing, social and emotional connection.

Cheers, my friend!

In the 1980s and the beginning of the '90s, the popular TV show *Cheers* aired in several countries around the world (https://en.wikipedia.org/wiki/Cheers). The show is about a bar with a lot of regular guests that have close personal relations with each other and the staff. They are somewhat friendly, which is the reason why these guests come back so often. The show had a theme song with the lyrics "*...and they're always glad you came. You want to be where you can see troubles are all the same. You want to go where everybody knows your name*" (Portnoy, 1982). The writer of the theme song captures some important elements of what it is that people long for in a place where they meet other people and become friends. The lyrics are commonsensical; however, very few researchers have attempted to substantiate if this is true or how these relations form in a hospitality setting, or how they lead to a drive for guests to come back over and over again, turning them into loyal customers. In this discussion paper, an attempt is made to show why creating friendships in commercial settings through building personal and emotional connections between hosts and guests can lead to better profit margins, what risks are involved and how this can be studied in the hospitality industry.

To build towards the final conceptual model in this article, which will explain how sustainable competitive advantage can be reached through adding social and emotional connections to a service, it is argued that these connections are similar to friendship, which is the core of hospitality. A description of the current status quo on knowledge about commercial friendships in hospitality is given, leading to a series of questions that should be answered to address an existing knowledge gap.

Sustainable competitive advantage

Marketing managers are developing ways to attract and retain customers to increase the return on investment (ROI; Rust et al., 2004). Retaining is better than attracting because it leads to a higher ROI, due to lower costs (Reichheld & Teal, 2001). Customers choose to stay and spend their money at certain companies because these companies are adding value to an offering in better ways than the competition does. When a company succeeds in doing so, they have a competitive advantage. When the added value helps to outperform competitors over longer periods of time and at an acceptable cost level, it is known as a sustainable competitive advantage (SCA; Coyne, 1986).

In the services industry, it is hard to maintain an SCA for several reasons. Firstly, because services are easy to copy, competitors can create the same offering fairly quickly. The second reason comes from the fact that customers' perception of service

quality is influenced by previous experiences (Zeithaml, 1988). Once they have had a good experience, this level is what they will expect in a future service encounter, turning the current level of service into a "hygiene" success factor (Balmer & Baum, 1993). In other words, if an offering stays the same over time, recurring guests will eventually become dissatisfied with a service, because their expectations have changed. That is why an adage in the hospitality industry is "exceeding customer expectations" (Feng et al., 2015), which means to continuously improve the experience of the guest, or as Hemmington (2007, p. 752) suggests, "put in lots of little surprises". Businesses need to create better service experiences for their customers each time they come back, or their patrons might get bored. Yet innovating is a costly endeavour without certainty of financial returns (Christensen, 1997).

Jantzen (2013) describes two ways to prevent boredom or disappointment in experiences, namely by improving them or deviating from them. When companies keep improving, they will sooner or later run into the limits of their capabilities and resources. Not everybody is capable and willing to work to earn a Michelin star. The problem with deviating from a service is that customers might not recognise it as being part of the core offering. For instance, one could add a show element like a magician to a dining experience in a restaurant. But at what point does the restaurant turn into a dinner show, and when does the dinner show turn into a circus with an accompanying meal? Next to the guests' perception, when deviating too far, the company's core capabilities are not suitable anymore. A chef knows how to cook, but may not know how to train animals.

As a result, businesses are left with the gradual devaluation of service quality in the eyes of repeat guests. The more often a customer returns, the less their expectations are exceeded, and thus arguably the lower the quality perception. However, repeat patronage is something worth striving for because it leads to a higher ROI. The solution to this problem might therefore lie in focusing on friendships between a company's host and its customers. An important part of friendship is that it grows each time people have pleasant interactions with each other. And this is perhaps where the key lies in creating a sustainable competitive advantage. In this way, the service quality would be perceived as better every time a customer returns and has pleasant interactions without exceeding the resources and competencies of the operation. To show how this could work, the following sections will discuss the concepts of the experience economy, commercial friendship and hospitality.

Experiences in the experience economy

The term *experience* as an economic offering was coined by Pine and Gilmore (1998). The difference between a service and an experience is characterised by a shift (1) from the mechanic to the humanic (sic) cues (Carbone & Haeckel, 1994), (2) from the physical to the social (Pullman & Gross, 2004), and (3) beyond transactional exchanges (Gill, 2018). This process has also been described as connecting on a personal, social and emotional level (Pine & Gilmore, 2019). These three differentiating points are very similar to what constitutes a friendship, i.e. "a voluntary interdependence between two persons over time, which is intended to facilitate socio-emotional goals of the participants" (Hays, 1988, p. 395). Feelings of trust, spontaneity and intimacy grow due to enjoyable interactions in which self-disclosure becomes more intimate, eventually leading to self-validation, positive affect, support and reaching socio-emotional goals (Banerji et al., 2020).

When these definitions of the experience economy and friendship are considered, many similarities can be found in the hospitality industry. Brotherton (1999) describes hospitality as a human exchange based on products and services, and which can be seen as adding "hostmanship" to products and services. This is said to be "the art of making people feel welcome" (Gunnarsson et al., 2011). This feeling of welcome is created by a genuine connection between a host and a guest, where the guest (1) feels appreciated, (2) connected to a person or a community and (3) has a sense of belonging (Medema & de Zwaan, 2020), making it almost equal to friendship. This similarity between hospitality and friendship becomes apparent when we look at the German word for hospitality being *Gastfreundshaft* which translates to "guest friendship". It could therefore be argued that the combination of friendship and service is the same as an experience and is the same as hospitality. Therefore, practitioners that want to create experiences that have an SCA need knowledge about how to design experiences such that they will lead to a friendship, yet the knowledge on how to do this does is incomplete.

Social and emotional connection

An experience is built from physical and human interacting parts which are governed by systems and processes. Human interaction is arguably the most important element because it leads to positive emotions and loyal behaviour (Pullman & Gross, 2004). Experiences can be broken down into a series of experiential episodes (Bastiaansen et al., 2019) which evolve over time and where five components (sensory, affective, cognitive, behavioural and relationships) rise and fall in importance (Pearce & Zare, 2017). This links to the appraisal theory of emotion (ATE), where emotions are conceived of as episodes where there are changes in feelings (affective), information processing (cognitive), action tendencies and physical responses (behavioural) (Moors, 2017), suggesting that the proper design of an experience leads to the elicitation of emotions. ATE also shows that different stimuli lead to a multitude of different emotions, each with its subjective feelings and behavioural responses (Moors et al., 2013).

It is perhaps surprising that most research only measures the valency of an emotion instead of the description of a discrete emotion, like happiness, joy, or contentment, which is seen as an omission by Prayag et al. (2019) in their review on consumer satisfaction in hospitality. They state that the relationship between discrete emotions and satisfaction should be examined more. Zhang and Zwaal (2021) also call for more research on using psychology in hospitality.

Another lack of knowledge comes from the fact that much research in hospitality and tourism management measures emotions via self-reports and that measurement scales are "largely borrowed from psychology without considering the specific characteristics of hospitality and tourism contexts", according to Tuerlan et al. (2021, p. 2741). The literature on neuromarketing shows multiple measuring techniques (e.g. verbal, behavioural and psychophysical) that can be combined to create more reliability and validity (Wang & Minor, 2008; Zeeland, 2016). Tuerlan et al. (2021) also show that there is a lack of consensus on the elicitation of consumer emotions. They

show that we do not know how experiences can be designed to create emotions that lead to a feeling of social connection and friendship.

Commercial friendship

Even less is known about friendship in marketing. In a literature review on this topic, Banerji et al. (2020) proposed a taxonomy of friendships. They categorised research based upon a "friendship formation dimension" and a "consumption timeline dimension". They classified a friendship between an employee and a customer as a commercial friendship. The consumption timeline is divided into before, during and after a purchase or consumption. Only 21 articles were found to address commercial friendship, of which two were focused on during consumption. None of them were done in a hospitality setting. In these articles, it is shown that relations between employees and customers are beneficial for marketing investments, but none of them are about ways to influence or enhance these relationships. What is known is that a genuine connection is correlated to a feeling of welcome (Medema & de Zwaan, 2020). This feeling shows several similarities with guest satisfaction. However, no quantitative scales have been developed.

It must be noted that having commercial friendships is not without risk for businesses. Grayson (2007) showed there could be a negative effect because people have exclusively intrinsic expectations from a friendship. When they are simultaneously confronted with more instrumental goals of business, they could feel they are being exploited, which would have a negative effect on business results.

This distinction between intrinsic expectations and instrumental goals is recognised in hospitality literature, where there is a distinction between authentic hospitality, which takes place in a private and social environment, and commercial hospitality, where it is part of a transaction. Lashley (2008, p. 1) says that "it is not inevitable that commercial hospitality is necessarily inauthentic", meaning that it lacks true intrinsic motivations and therefore is not hospitable in the true sense of the word. However, "customers prefer a synthetic smile to a genuine scowl and therefore staff are actors displaying parts of their whole to meet expectations of the customer" (Nailon, 1982, p. 140). This suggests that there is a need to pretend to be a friend through acting in the hospitality industry. It might be wise to borrow a concept known as the suspension of disbelief from the theatre world. It describes how artists try to take "a semblance of truth sufficient to procure for these shadows of imagination that willing suspension of disbelief for the moment" (Coleridge, 1985, p. 6), which means that if done correctly, people are willing to accept the fake as being real under certain circumstances.

Research questions

This discussion in the literature raises a series of unanswered questions. First and foremost is the question: (1) what are the causal relationships between elements of human interactions in a hospitality experience and the elements of commercial friendship? A pragmatic view on research is taken here. Answering this question is done in two stages. First, one would start with the conceptualisation of all the important elements of friendship and human interaction in hospitality. Since friendship is a social construct stemming from the minds of the participants, an interpretive view on the research method is called for. Through a qualitative study of the literature about friendship and a series of interviews with hosts and guests, it can be deduced what elements exist in their minds. The same can be done for human interactions. A categorisation of elements in human interaction can come from literature research and interviews with hosts and managers of hospitality businesses. The inquiry will be on what elements of interactions can be distinguished. From this, hypotheses can be formed. After this is made clear, experiments need to be set up to find causality. The elements of human interactions should then be manipulated to find changes in elements of friendship. This calls for a combination of both a positivist view as well as an interpretivist view, because emotions have different components (Moors et al., 2013), of which some are subjective such as feelings or cognitive appraisals, others are more objective such as the physical responses and the actual behaviour. To measure the social and psychological constructs, proper measurement techniques need to be developed and tested. When combining several measurement techniques, an attempt is made to close the gap between the two philosophies. In consumer research, three different types of measurement techniques can be used: verbal, behavioural and psychophysical. The first two are interpretations of social constructs by either the respondent or the researcher. Measurements of bodily functions can be seen as observable phenomena independent of social actors and which are free of value. Methods that combine verbal techniques with behavioural and psychophysical are more valid, but knowledge on how to do this accurately is still being developed. To answer these questions, a quasi-experimental setup can be planned in a restaurant or bar setting where staff will receive instructions on how to act. At the same time, both host and guest are monitored using different techniques.

The next question is: (2) how can we measure components of friendship in situ? The same philosophical view for answering the causal relationships of the first research question is used here. The reason that the research needs to be done in situ is because the experiment would need to feel genuine to participants. Putting two people in a lab and having them interact with each other would be unnatural and would impede normal human interactions.

Because of the limited knowledge on friendship in marketing, the phenomenon needs to be explored. Instinctively, one can assess that a true friendship between two persons is different than a friendship between a host and a guest. The latter probably being more equal to what Aristotle (2009) describe as friendships based on usefulness and pleasance. So, it is known that there is a difference in types of friendship, but how to measure the strength of such a relationship is not defined. This then raises another question: (3) are there different stages or levels in commercial friendships? This question can then be combined with: (4) how does friendship evolve during a series of experiential episodes? This would mean that a longitudinal study is necessary.

Since a commercial friendship would be the result of a designed experience, the question arises if it would be believable in the eyes of a guest. This leads to the question: (5) under what circumstances is the act of friendship accepted as genuine by the guest? Only then would it be possible to answer the more practical question: (6) how can we design experiences in such a way that they would lead to a commercial friendship? For practitioners that

want to create SCA, this is very important to know and will fill a gap in current academic literature and knowledge. Design-based research would be the best way to go about doing this, since this is a more purpose-driven type of research.

Scope

This research will be done in the hospitality industry, which is logical because "hospitality is rooted in social engagement" (Lashley, 2008, p. 1) and hospitality is about making people feel welcome through genuine connections (Medema & de Zwaan, 2020). So, the researched phenomena can be assumed to appear here. Commercial friendship was chosen out of the different types of friendships (Banerji et al., 2020), because "personal friendships" have already formed before the individual uses the experience. "Contextual friendships" were discarded because of the difficulty of influencing the independent variables. Employees can be instructed while two different guests are mostly autonomous. "Business friendships" would not lead to SCA and were also omitted.

Contributions

Several theoretical contributions will come from this research. It will make clear what causal relations there are between the components of a hospitality experience and a social and emotional connection between the host and the guest. Existing measurement techniques are combined, and it will be shown that they increase the validity and reliability of the measured phenomena. The relationship between commercial friendship and sustainable competitive advantage is shown. Through the literature on suspension of disbelief, it is shown that emotional and social connections between a host and a guest are seen as genuine under certain circumstances.

With all this knowledge in hand, a practitioner is now well equipped to design experiential episodes to create social and emotional connections leading to a sustainable competitive advantage. Figure 1 shows the conceptual framework that comes from this discussion. It shows that the experience is made up of physical and human/relational components connected through systems and processes. It shows that part of the experience is a series of interactions between the host and the guest. This interaction than leads to a commercial friendship, which is built up from discrete emotions and social connections. This in turn can lead to a sustainable competitive advantage.

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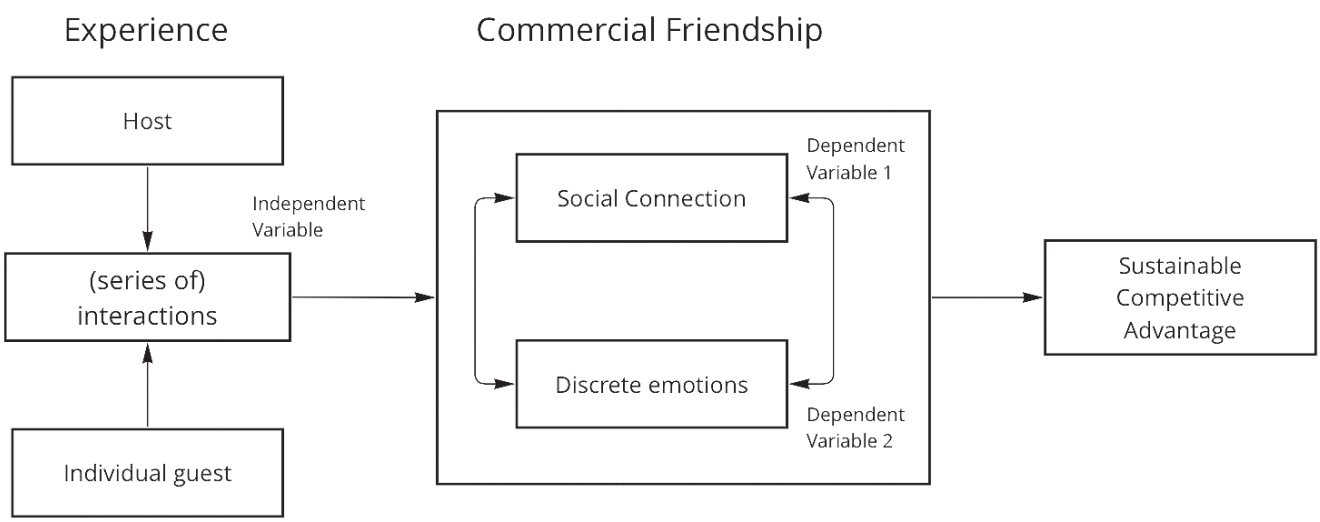

FIGURE 1: **Conceptual map**

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The Delphi technique: a tutorial

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ABSTRACT: The Delphi technique is a recognised research technique designed as a futures-oriented methodology that gathers data by engaging a panel of experts to make judgements on a specific real-world issue. The technique enables the researcher to interact with key stakeholders and decision makers in the field, who are well experienced and trained in the specialised area of knowledge related to the target issue of the research, enabling researchers to gain a deeper understanding of real-world opinions. The Delphi technique has been described as a qualitative, quantitative and mixed methods approach as the collection of narrative group opinion, coupled with the strictly structured nature of the process and quantitively described results, poses a challenge to situate the approach in a specific methodological category and its usage. This methods tutorial discussion aims to illustrate the usage of the Delphi technique by providing a worked example to demonstrate the proposed method in a hospitality industry setting.

KEYWORDS: experts, future oriented, HR, hospitality industry, research approach

Introduction

The Delphi technique can be understood as an anonymous iterative process of expert judgments on a specific issue, with the aim of collecting consensus and dissent in the judgments and justifications (Ab Latif et al., 2016). Therefore, the Delphi method can be defined as a comparatively highly structured group communication process in which coarse facts are judged by experts about the uncertain and incomplete knowledge that exists (Jeste et al., 2010). The aim of the Delphi method is to combine the knowledge of several experts to come to a future prognosis (Ab Latif et al., 2016; Robertson et al., 2017). The rationale is that several experts can give a better prognosis than a single expert. Creswell (2007) and Skulmoski et al. (2007) suggest that it is the knowledge, experience and background of the panellists that makes them experts in a Delphi study. This assumes that experts in their field can give valuable insights about future developments (Keeley et al., 2016). The Delphi technique has been described as a qualitative, quantitative and mixed methods approach as the collection of narrative group opinion, coupled with the strictly structured nature of the process and quantitively described results, poses a challenge to situate the approach in a specific methodological category. However, the Delphi method is mostly used as a multi-level qualitative method using a series of rounds of data collection in a highly structured group interaction.

According to Sobaih et al. (2012), the experts' explanations are particularly beneficial in qualitative research studies and enhanced by the iterative and consensual nature of the three stages of a Delphic study (initial, core and final). The Delphi method is often used when there is insufficient empirical data to make a valid prognosis (Robertson et al., 2017). In summary, Sobaih et al. (2012) sum up the objectives of the Delphi studies into four points:

1. Collecting and distilling knowledge from a group of experts;
2. Achieving consensus and/or gaining judgement on complex matters where precise information is unavailable to underpin a prediction of the future;
3. The reliable and creative exploration of ideas; and
4. The production of suitable information for critical decision-making.

The Delphi technique is characterised as a method for structuring a group communication process so that the process is effective in allowing a group of individuals to deal with a complex problem (Robertson et al., 2017). Data is generated through an interaction between the interviewer and the participant. In a Delphi study, it is important that random deviations, different understanding of the statements, or misunderstanding of numbers (for example with assessment scales) and the actual difference in responses are separated in the assessment to reach objectivity (Keeley et al., 2016; Robertson et al., 2017; Sohaih et al., 2012).

This article focuses upon the usage of the Delphi technique in qualitative research, particularly in the hospitality industry in the Netherlands. It presents the collection of narrative groups (expert) opinion and quantitively describes the results based on the six-phase framework for thematic analysis of hospitality experts' responses. The article is part of a study whose main aim is to develop hospitality industry recruitment and retention guidelines that a panel of experts is likely to use (McMillan et al., 2016) in informing hospitality industry human resource management (HRM) strategies. The study aimed to research consensus on the strategic HR approaches required to improve recruitment and retention in the hospitality industry.

Attracting, retaining, developing and motivating hospitable talent is a perennial problem in hospitality industry's talent management (TM), more so in the 21st century and post-COVID-19 when the hospitality industry became seriously impacted. To contribute to further understanding of TM challenges and opportunities in the hospitality industry, I looked for in-depth, robust information from human resources experts in the hospitality sector. The Delphi technique allowed me to go in-depth with the panellist's independent opinions through a back-and-forth engagement till consensus was reached. This Delphi methodology tutorial discussion aims to act as an inquiring research methodology vehicle with teaching and application benefits to researchers and students who are seeking to explore forward-looking research. The Delphi method is such a future-oriented methodology, as it asks experts to evaluate and/or to make judgements about how they see a certain theme developing in the future. The Delphi process could be beneficial to research students, presenting them with an opportunity to directly engage with experts in their field of research and actively take part to forecast and raise potential solutions as it involves multiple interactions in conversations with key stakeholders on a number of occasions. These rounds of interaction could also help the students to create and develop a specific professional know-how and enlarge their network to present robust perspectives on the particular theme they are researching.

The Delphi process experience

The choice for the Delphi method was influenced by various factors, such as the aim of the study, which required the opinions of experts on the subject to make valid judgements (Sobaih et al., 2012) and that a consensus by the experts is reached (Harvey & Holmes, 2012). This was reached under an interpretivist paradigm, where a panel of hospitality industry experts was engaged in a discussion on human capital strategy. The guiding question for the discussions was: how the hospitality industry can attract and retain the right talent. According to Mason (2018), research questions should address the intellectual and theoretical contributions of the overall research. Therefore, to further understand the importance of personal attributes that could enhance the hospitality industry's recruitment and retention from the industry's perspective, experts' individual opinions were sought.

The aim of this research study was to develop hospitality industry recruitment and retention guidelines that the panel of experts is likely to use (McMillan et al., 2016) in informing the hospitality industry's HRM strategies. The development of guidelines requires a rigorous process, with consensus needed from the experts to give authority to the final decision (Bloor et al., 2015). Further, the associated practicalities and limitations such as time and geographical logistics involved had an influence (Keeley et al., 2016). It became unrealistic for me to gather all the experts in one specific area due to their "always-full" agendas and still provide the required anonymity. The Delphi technique allows experts to deal systematically, anonymously and in their own time with complex issues for which their level of knowledge is necessary (Bloor et al., 2015; Okoli & Pawlowski, 2004; Sekayi & Kennedy, 2017; Yousuf, 2007). Thus, the use of the Delphi method was appropriate as it preserved participants' anonymity, the participants were not able to influence each other and therefore were conducive to independent thinking and thus gradual formulation of reliable judgements and results forecasting (Bloor et al., 2015; Sekayi & Kennedy, 2017).

Using the Delphi method (semi-structured, open-ended interviews) for this study ensured that there was a balanced participation from the panel of experts, while ensuring that the experts brought direct in-depth knowledge to the discussion (Sobaih et al., 2012). Unlike a focus group where the facilitator must control and minimise the risk of a dominant participant influencing the outcomes (McMillan et al., 2016), a semi-structured Delphi format helps to ensure that the most important aspects are covered, while allowing the participants the flexibility to explore relevant concepts. However, in Delphi studies, issues that are of interest to an academic researcher may not seem obvious to the practitioner or vice versa. Thus, to avoid high participant withdrawal, well-constructed research questions are essential (Sobaih et al., 2012).

In focus groups, data is generated through an interaction between the participants, facilitated by the researcher (Keeley et al., 2016). Participants can listen, discuss, agree, question, or clarify points that are raised by other participants in the group. This synergistic approach may help the participants explore outcomes that they deem to be relevant to them about talent management challenges and opportunities in the hospitality industry. It would enable them to see how their experiences and opinions differ from that of the other panellists in the group. However, there were also drawbacks to this approach for this research study.

The logistics involved in setting up a focus group for this study was a challenge. Further, group discussions can be intimidating and inhibitive to an individual participant (McMillan et al., 2016). I was not able to offset the shortcomings associated with pooling opinions obtained from focus group interaction, i.e. participant anonymity, influences of dominant individuals and group pressure for conformity (Hsu & Sandford, 2007; McMillan et al., 2016). The panellists were drawn from the hospitality industry in the Netherlands, are associated with an educational institution (stage 1 of this study) and were expected to be unbiased in their opinion with a genuine aim of improving hospitality industry recruitment and retention. This panel's characteristics meant that there was a need for a trusting environment where the panel could be reflective and share their talent management experiences and opinions as employees and as policy makers, with the required anonymity assured as per my capabilities. Moreover, Sobaih et al. (2012) suggest that using the Delphi technique enables the researcher to easily control the discussion should it stray into areas peripheral to an ongoing public debate regarding hospitality industry issues and behaviours.

The hospitality industry is a tribe (micro-community) where employees, regardless of their position, provide services to various customers ranging from a typical hotel guest to an employee as the organisation's asset (Robinson et al., 2014). Experts may know each other through working together for the same organisation at different career points or being members of the same association (Paraskevas & Saunders, 2012). The panellists, regarding their position in the hospitality industry, are also expected to maintain a positive attitude, even though they may experience obstacles. Thus soliciting their opinion in an open-group setting could have hindered their level of responses. On the other hand, completely eradicating the aspect of personality is difficult in the Delphi technique too as the experts may use informal channels of communication which

the researcher has no access to, such as in the case of Lugosi et al. (2012) where investigative research on internet streaming needed to gain permission to enter a blog. The Delphi technique ensures that each participant would have no pressure, either real or perceived, to conform due to social norms, customs, organisational culture, or standing within the profession (Hsu & Sandford, 2007).

This study sought to provide "solutions" to recruitment and retention challenges facing the industry and found it logical to engage the opinion of a panel of experts where there was no chance that they would influence each other's opinion (McMillan et al., 2016). Using the Delphi method enabled me to engage the panellists to look for solutions which were then prioritised and agreed upon.

Panellists selection: population and sampling

What constitutes an optimum number of participants in a Delphi study has not reached a consensus in the literature (Delbecq et al., 1975; in Hsu & Sandford, 2007; Sekayi & Kennedy, 2017). Some of the published studies seem to clearly agree that there are no existing criteria to identify the ideal sample size in a Delphi study (Hsu & Sandford, 2007; McMillan et al., 2016; Robertson et al., 2017). However, a Delphi study does not require a large statistical sample that attempts to be representative of any population as it is a group decision mechanism (Okoli & Pawlowski, 2004) where the quantification of incidences is not the focus (Ritchie et al., 2013). The purpose is to collect rich data that allows in-depth exploration and understanding of a specific topic (Keeley et al., 2016). However, an expert panel (sample) size ranging from seven to fifteen (Hsu & Sandford, 2007; Sobaih et al., 2012) and rarely exceeding 30 (Sekayi & Kennedy, 2017) is considered appropriate as the sample should be a representative pooling of judgement and information processing capability (Ritchie et al., 2013). This study's panel of experts sample group comprised of 14 hospitality industry experts who hold different levels of leadership positions in the hospitality industry.

Hospitality experts in the Netherlands acknowledge the industry's recruitment and retention challenges (*Stichting Vakbekwaamheid Horeca* [Professional Competence in Hospitality Foundation], 2018). However, they would differ on individual perceptions regarding talent management challenges and opportunities such as employee wellness, job and character fit and the right personality profile for the industry. According to Sobaih et al. (2012), these differences highlight the importance of including variation in a sample, in this case diversity of experience and employment profiles.

Sampling

For the purposes of this article, the term *sample* is interchangeable with participants and/or the selected panel of experts. The sampling strategy that facilitated data collection is purposive sampling. A carefully selected panel of hospitality experts were sampled as it was critical for this study's aim to identify and recommend recruitment and retention strategies that are relevant for all hospitality industry stakeholders. Purposive sampling can be used to recruit heterogeneous maximum variation samples where participants differ by selected characteristics to identify a maximum variation sample (Keeley et al., 2016). I believe that the chosen panel (sample) size constitutes a good representation of hospitality expert opinion. The panel (sample) is derived from the hospitality industry population in the Netherlands and comprises senior managers from international chains of hotels ranked as four and five stars, as well as senior consultants with globally reputable hospitality organisations. The participants have a wide range of hospitality experience having worked their way up from mid-level management to directorship positions. Therefore, the panel composition is representative as the experts have an average of 15 years of hospitality industry experience in and beyond the Netherlands, meaning that their responses were based on a broader perspective.

As is the tradition of the Delphi process, selected participants (panel of experts) should be well versed and experienced in the research topic for the findings to have critical authority (Sobaih et al., 2012). This study's sample choice and size was found to be appropriate for this study's aim due to the following criteria:

1. The panellists have a high level of authority about talent management due to their employment history in the hospitality industry (Paraskevas & Saunders, 2012; Sekayi & Kennedy, 2017);
2. The panellists are associated with the education institution used to collect data in the first stage of the study on an advisory board level, thus their opinion is recognised in the development of future hospitality industry employees (Sobaih et al., 2012);
3. The panellists were willing to participate, likely to be committed to support the study's topic and aim and had effective communication skills and a good command of the English language (Okoli & Pawlowski, 2004; Donohoe & Needham, 2009); and
4. The sample size of 14 was appropriate as a point of diminishing return was noted (conceptual saturation was achieved) (Keeley et al., 2016).

Informed consent to participate was sought from the participants, confirming that they understood the purpose and procedure of the study, their rights in the course of this study and the benefits of their participation.

Case study: example of a qualitative Delphi study

Data collection procedure

Data was collected using the Delphi method's semi-structured interview technique. The semi-structured, open-ended questions were shared with 16 panellists that responded to my request and agreed to participate in the study. The panellists shared their responses electronically in a series of three iterations designed to develop a consensus. A three-round Delphi process was chosen as three rounds are considered adequate for panellists to achieve consensus (Skulmoski et al., 2007). Iterations refer to the feedback process viewed as a series of rounds where each participant responds to a semi-structured questionnaire that is then returned to the researcher (Hsu & Sandford, 2007; Saldaña, 2015).

A description of each ranking based on the following identified themes is presented below, namely hospitable personality, HRM talent management strategies and policies, employee well-being and work environment. According to Sekayi and Kennedy (2017), a description of each ranking is provided to enhance the consistency in meaning of panellists' responses:

Strongly endorsed: Panellists fully agree with the presented statement with no further modifications necessary.
Moderately endorsed: Panellists agree to a certain degree with minor but important modifications (present hindrances and suggestions on the cause of the presented outcome).
Minimally endorsed: Panellists disagree with the statement.
(Bloomberg & Volpe, 2016; Sekayi & Kennedy, 2017).

The first round of the data collection was initiated where all the panellists were presented with a set of open-ended questions in the form of six statements about hospitality industry recruitment and retention opportunities and challenges to respond to and endorse independently. The statement rankings were agreed upon after engaging with the panellists in debating and discussing the presented statement and responses to a theme in several rounds.

The six statements were shared via electronic means i.e. e-mail and phone communication between the participants and me. It is important to start the Delphi process with carefully selected themes which are normally grounded in theory, and thus the statements were informed by a critical review of literature and the findings of the first phase of this study. I communicated response deadlines, which were not completely adhered to for a variety of reasons. For practical reasons, a decision was made to work with the received responses of $N = 14$, thus there was a response rate of 87.5%. The entire data collection process took four weeks.

Upon collection of the narrative comments on the statements provided by the participants, the data were sorted and overarching categories and concepts were identified and labelled using open and axial coding (Saldaña, 2015; Mason, 2018). This step consisted of assigning descriptive labels and identifying how these descriptive codes fit together to make meaning (Brinkmann, 2014; Sekayi & Kennedy, 2017). The generation of a list of statements using the generated categories from the axial coding process followed. According to Sekayi and Kennedy (2017), this data reduction step requires that some statements are reworded to create a composite group response. The data was analysed once again. Participant comments and responses were integrated into the statements and new statements developed and presented to the participants. Finally, the findings of round one were shared with the panellists, as a summation makes each participant aware of the range of opinions and the reasons underlying those opinions (Hsu & Sandford, 2007).

Round two comprised four open-ended statements for the panellists to respond to. Each of the panellists were asked to review and react to the statements summed up by myself, based on information collected in round one. The four statements were formulated as a representation of round one panellists' opinions. The statements focused on the HRM best practices that could improve employee well-being by developing resilience support mechanisms for employees. The panellists were asked to respond to the statements and include any modifications within a week. Upon receipt of the responses, I analysed the data and generated clear and inclusive statements while maintaining the original purpose and meaning. There were no modifications that arose from the responses that altered the original statement and thus there was no need for additional statements to reflect the new idea (Sekayi & Kennedy, 2017). The participants were given an extra opportunity like in round one to revise their responses, but there were no adaptations to their original judgements. Therefore, consensus was achieved and the outcomes were presented among the participants' responses. The number of Delphi iterations depends on the degree of consensus sought, which can vary from three to five (Delbecq et al., 1975; in Hsu & Sandford, 2007).

In round three, the final presentation of the findings to the participants was based on their level of endorsement from rounds one and two of the Delphi process. The expert opinion supported this study's final contributions, which was the development of an effective recruitment and retention toolkit that supports the industry to remodel their recruitment and retention strategies to encourage employees' emotional resilience, and ultimately, improve talent attraction and retention. This final part of the study was to develop findings and generate knowledge for industry practitioner use (Ritchie et al., 2013). The toolkit addresses hospitality talent management issues such as work-life balance, remuneration, scheduling, career development and training.

After the data was analysed, the panellists were contacted and the research findings shared with them. The panellists were invited to comment on the findings and conclusions drawn in this research study. A response timeframe was set to a week and all the panellists shared their findings response within this period. The number of panellists (14) was found to be appropriate for this study as it did present enough diversity of perspective (Sekayi & Kennedy, 2017) on talent management opportunities and challenges in the hospitality industry. According to Ritchie et al. (2013), the appropriate panel size can be determined by a representative pooling of judgement and information processing capability.

The first draft of the proposed strategic HRM recruitment and retention toolkit was drafted and circulated to the experts for their feedback. The participants were asked to read through the proposed toolkit and give their feedback within two weeks, which they adhered to. Received feedback contained minor comments for alterations regarding the toolkit content, i.e. use of industry jargon such as mentorship was replaced with competitive mentorship and professionalism was replaced with the surprise economy in the toolkit. According to the panellists, the surprise economy entails an employee having unexpected positive experiences throughout their experience journey.

I incorporated the experts' feedback and once more circulated the re-adapted toolkit for final comments. The response time took an average of ten days, with reminders to respond being sent out to the participants. The initial deadline communicated was five working days. In this third and final round of feedback, the responses were committed and inclusive of the participants opinions and recommendations as there was total agreement because the panel of experts reached a hundred per cent consensus. The experts endorsed the proposed hospitality industry strategic HRM recruitment and retention toolkit as user friendly and of relevance to both the operational and strategic operations in hospitality industry. In the end, there were four expert rounds of discussions to achieve consensus and endorse this research study's findings by hospitality industry experts.

Data analysis

For this study, abductive data analysis thinking is used as the goal is to understand and offer valid explanations (Brinkmann, 2014) as to why the industry is struggling to attract and retain talent. The data analysis aims are to interpret hospitality experts' meanings and interpretations of recruitment and retention experiences and opinions to develop new theories from the data using sensitising concepts (Mason, 2018), as well as to inform on possible solutions for improving recruitment and retention strategies. Therefore, an interpretive content analysis is used to depict what is meant by the data (Ritchie et al., 2013).

The raw data set was taken through three iterations as consensus was determined and achieved. Hsu and Sandford (2007) confirm that three iterations are often enough to collect the required information and to reach a consensus in most cases. However, the kind and type of criteria to use to determine and define consensus in a Delphi study is subject to interpretation as consensus can be decided if a certain percentage is reached (Sekayi & Kennedy, 2017). Some criteria recommend that at least 70% of Delphi subjects need to agree on the statement, the subjects need to rate three or higher on a four-point Likert-type scale and the median should be at 3.5 or higher (Miller, 1956). However, Hsu and Sandford (2007) reveal that the use of percentage measures is inadequate. They suggest that a more reliable alternative is to measure the stability of subjects' responses in successive iterations. To undertake a valid analysis, this study borrowed from the six-phase framework of Braun and Clarke (2006). However, according to Braun and Clark, the six phases are not necessarily linear, and one can move back and forth, especially when dealing with complex data.

Analysis process

Data was analysed and triangulated using elements of the six-phase framework proposed by Braun and Clarke (2006). This framework for thematic analysis ensured rigour in the data analysis process with a rich thematic description and a valid reflection of the data set (Bree & Gallagher, 2016). I implemented an easy and practical method to thematically analyse the hospitality experts' panel responses using Microsoft Excel. An abductive approach was implemented where the data was coded and categorised for analysis, ensuring that the analysis process was determined by collected data during the evaluation phase (Bree et al., 2014). Identified themes were initially analysed in a descriptive form to show patterns in a sematic manner and thereafter the analysis progressed to an interpretive form, thus looking beyond the surface (latent) to present data with broader meanings (themes/patterns are deduced via engagement with literature) as advised by Braun and Clarke (2006).

Once the data was sorted and ordered, I started to make some interpretive sense of the data to create a transparent data display (Mason, 2018). Thereafter, categories of information were generated, referred to as codes (open coding), and positioned in the theoretical model (axial coding) as emerging themes were identified and recoded. Each of the response categories had one or more correlated idea that gave a deeper meaning to the data. Various coding groups would be summarised under an overarching theme. Saldaña (2015, p. 142) defines a theme as "a phrase or sentence that identifies what a unit of data is about and or what it means". Theming of concepts is also referred to as conceptualisation, labelling shifts from raw data to a more abstract representation (Brinkmann, 2014; Mason, 2018). This allowed room for gathering different phenomena with the same properties under its corresponding abstract concept (Saldaña, 2015). This article does not claim that the interrelationship among these steps is necessarily linear (Bloomberg & Volpe, 2016). Each phase in this multi-round process leads logically to the next. Once the results were clear, I reviewed the literature and observations to find correlations.

Validity, reliability and credibility

To demonstrate reliability, I incorporated Delphi process research practices that enhanced the research credibility by minimising the errors and biases in the research so that if the same research were to be conducted following the same procedures, the same findings and conclusions would be drawn. To increase the study's validity, the panel was selected from the field of study, i.e. the hospitality industry. Such participants are directly affected and are likely to benefit from the study's research findings. Fourteen hospitality experts with a diverse range of expertise were engaged in three iterations, which helped me to minimise the likelihood of access to a panel that was not representative of the hospitality community, thus increasing the study's relevance to both academics and the industry. Further, the use of three rounds of the semi-structured interview statements assisted in increasing the concurrent validity, while engaging panellists who are hospitality experts (knowledge, experience and interest) increased the content validity. Delphi panellists are typically selected, not for demographic representativeness, but for the perceived expertise that they can contribute to the topic (Sekayi & Kennedy, 2017).

To further demonstrate credibility, the 14 panellists shared opinions and decisions were strengthened by reasoned argument in which assumptions were challenged till consensus was achieved. Therefore, through prolonged engagement, the modifications helped to ensure the research credibility as several distinct questions were presented to the experts who were encouraged to offer detailed examples of their opinions and experiences. I asked follow-up questions where necessary and the raw data (interview responses) was studied until a theme under the study's phenomenon emerged. In addition, I constantly read and reread the raw data, analysed and themed it, while revising the concepts accordingly, to develop the codes and concepts to examine the data characteristics to provide the intended depth of insight.

To demonstrate sensitivity to context, I related the study to previous relevant research on hospitality industry recruitment and retention challenges. I noted not only where the study's findings echo the previous studies, but also where they differ and offered suggestions on new ways of conceptualising the effect of employees' emotional resilience on hospitality industry recruitment and retention. According to Lyons and Coyle (2016), research rigour relates to the completeness of the data collection and analysis, while transparency entails detailing every aspect of the research process of data collection and analysis.

Research ethics in a Delphi study

When asking individuals about their opinions and behavioural patterns, some ethical considerations should be considered. According to the European privacy law, the general data protection regulations pertaining to collecting and utilising

personal data were adhered to. The *Algemene Verordening Gegevensbescherming* (General Data Protection Regulations) demand that any data collected cannot be used unless a participant willingly waives their right to the data (*Autoriteit Persoonsgegevens* [Dutch Personal Data Authority], 2018). For this research study, the participants were asked to waive the ownership of their personal data by signing a consent form before participating in the research. The participants were informed that anonymous codes would be used during the data entering process. The codes are only known to me to identify the participants. I am the sole owner of the acquired data which was handled and treated confidentially. There were two debriefing opportunities for the participants.

In the Delphi process, the panel's anonymity was assured by setting up an interview process that avoided any face-to-face meetings, as the panellists were requested and expected to respond to the statements individually, thus their responses could be unbiased and valid and consensus achieved. Consensual agreement among expert panellists of anonymised opinions and statements was achieved through repeated iterations by email. The panellists were provided with an informed consent form which, upon signing, meant that they understood the aims and expectations of the research. All the panellists agreed to participate in the research due to their expertise in the hospitality industry and their roles as an advisory board members of a hospitality training institution based in the Netherlands. The identity of the panellists was only known to me. To maintain Delphi technique research rigour, a response rate of 87.5% (14/16) was achieved and maintained throughout the process. Even though the panellists may know each other through different channels, their judgement and opinions remained strictly anonymous.

Limitations

It was a challenge to correctly define an expert because job titles differ across the hospitality industry and experts identified early in the research could change employment. This characteristic may affect the research validity if the findings are only drawn from the perspective of a predefined expert. Taking a pragmatic approach in this industry with high levels of staff replacement and fragmentation into large, medium and small operators, it can be difficult to conduct follow-up interviews as experts may have moved on to new employment and no longer be available (Sobaih et al., 2012). Another Delphi caveat is the time commitment required of the participants. A qualitative Delphi technique requires active participation, which can be a challenge as the hospitality industry is labour-intensive (Davis, 2015) and experts may not have enough time to engage in the Delphi process. This means that there is the ever-present risk of participants dropping out before the process concludes (Sekayi & Kennedy, 2017). This limitation was addressed by clearly informing the panellists of the commitments involved in advance, and offering convenient options for data collection, for example having a direct email link where the participants could respond with one click. The transferability of the research might have been challenged as the panel members may have based their opinions on their current employment responsibilities and current talent management challenges, thus their validation may not be as neutral as expected. Another transferability critique could be that the panel comprises a small sample size that is meant to be representative of hospitality industry experts. This article acknowledges that a Delphi sample could be derived from a global pool of hospitality representatives and other direct stakeholders such as union representatives to address this limitation.

Conclusion

The Delphi method is used as a multi-level qualitative method using a series of rounds of data collection in a highly structured, anonymous group interaction. The Delphi technique is insightful and facilitates the collection and evaluation of a depth and breadth of information essential for critical qualitative research. The Delphi technique is an important data collection methodology for researchers eager to gather data from people who are immersed in the topic of interest to provide real-world knowledge.

Employing the Delphi technique enables a researcher to get in-depth data through semi-structured, open-ended interview questions from the perspectives of the research participants in their domain of expertise anonymously. The Delphi technique is an effective way of engaging with experts and collecting qualitative data from a diverse sample of participants that can be restricted by research-associated practicability's and limitations such as time and geography.

The Delphi technique is a flexible tool that enables researchers to explore and discover what is known and/or unknown about a specific research theme. Therefore subject, expert or participant selection should be considered carefully prior to starting such a study. This article aims to add to the limited literature on conducting a qualitative Delphi analysis.

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