# *Journal of* HOSPITALITY & TOURISM *Cases*

Volume 7, Number 3 • 2018 • ISSN 2164-9987

## EDITORIAL



## COMPETITION WINNER*



## PUBLISHED CASES



**** Third winning case study of the 2017 ICHRIE Johnson & Wales Case Study Competition***

# *The* ICHRIE JOHNSON & WALES *Case Study Competition & Publication Series*

is made possible by a generous donation from

JOHNSON & WALES UNIVERSITY

*JOURNAL OF HOSPITALITY & TOURISM CASES*

**EDITOR • Marianna Sigala,** University of South Australia

### Wildlife Tourism as a Form of Ecotourism: The case of the Sacred Monkey Forest Sanctuary of Ubud, Bali

*by Dominique Bragg and Cynthia S. Deale*

This case study describes the impacts of wildlife tourism and two issues of carrying capacity at the site of the Sacred Monkey Forest Sanctuary in Ubud, Bali, Indonesia. It reviews the potential problems that may arise as the resident monkey population continues to grow and more tourists flock to experience the Sacred Monkey Forest Sanctuary.

Key words: wildlife tourism, ecotourism, sustainable tourism, carrying capacity

### Wheelchair Friendliness Versus Compliance in the Hospitality Industry

*by Cynthia Mejia*

Over the last three decades due to advocacy and research, numerous advances in wheelchair accessibility have positively impacted the hospitality industry. In the United States, the Americans with Disabilities Act (ADA) updated several accessibility laws beginning in 2008, which mandated a multitude of structural, design, and operational modifications to public hospitality and tourism-related spaces. While accessibility undergoes continuous improvement, there remains a wide range as to the degree of compliance among hospitality business owners and operators. This case study explores the differences between wheelchair "friendliness" versus "compliance" and the opportunities possible for the service-intensive hospitality industry. Also, students will encounter Self-Determination Theory (SDT) and the latest proposed definition of "disability", which invokes a paradigm shift focusing on the interaction between a person and his or her environment, as opposed to a perceived "impairment". Considering the large number of wheelchair travelers and their companions, in addition to the increasing number of wheelchair users age 65 and older in future years, it is incumbent upon the future leaders of the hospitality industry to meet and exceed the needs of this traveling population.

Key Words: Wheelchair; ADA Compliance; Facilities Management; Accessible Tourism; Hospitality; Disability

### Emirates Airline: The new norm of air travel?

*by Kimberly Mathe, Lauren Finnell and Paige Peterman*

In the year 2017, the airline industry has been at the center of many viral video incidents ranging from a passenger being injured while being dragged off a United Airline flight, to an American Airline's employee challenging a male passenger to a fight. With events like these, it is an opportune time for an airline to position itself as a leader in customer service and travel amenities. Emirates Airline, based out of and owned by the country United Arab Emirates, has long attempted to do just that by providing services to passengers that go above and beyond many of the standard features one would see on any of the big three US airline carriers. This case provides an examination of Emirates Airline, their history, their strategy and positioning, as well as a brief overview of some external threats and internal strengths and weaknesses for analysis. The accompanying teaching note provides educators a series of learning objectives to achieve through a series of discussion, assignments, and a project.

Key Words: luxury branding, airline industry, brand management, strategic positioning

### The Northern Likes: The Case of Northwest Territories' social media campaign

*by Michael W. Lever and Statia Elliot*

This case is designed to assess an awareness campaign created by the Northwest Territories (NWT) tourism marketing organization, known as NWT Tourism, to build engagement with their Spectacular NWT brand. NWT Tourism launched the Secrets campaign to coincide with Canada's 150th anniversary, featuring 150 Secrets of the Northwest Territories, posted daily via social media. At just past the campaign mid-point, the location of each Secret reveals certain patterns that, when used in combination with NWT Tourism's strategic objectives, consumer responses, and visitor trends over a five-year period, can be pieced together to evaluate the overall effectiveness of this social media campaign in Canada's north. Additionally, NWT Tourism's real-world campaign draws upon concepts in tourism and marketing such as destination brand and tourism destination image.

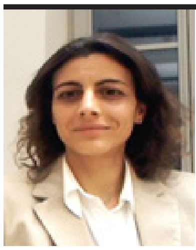
Key Words: Digital Marketing, Social Media, Destination Awareness, Trend Analysis

### When a Food Quality Issue Goes Viral: The Case of Stop Bugging Me with the Broccoli!

*by Tod A. Nissle, E. Oliver Sach and Donald G. Schoffstall*

This case study examines a cafeteria food quality issue that became the catalyst to a negative social media campaign, highlighting the power of social media and the importance of training and quality control. Foodservice is a dynamic business dependent upon a series of events that must be executed precisely to ensure customer satisfaction. Perhaps most challenging is ensuring line level employees maintain choreography even under pressure. Customer satisfaction systems are seemingly more important than others, as the impact of errors is exploitable through social media. Investigatory questions are included to further explore potential issues associated with negative social media.

Key Words: Contract foodservice, Training and process, Social media, Facility condition, Hospitality



***Professor Marianna Sigala***
*University of South Australia*
*Chair, ICHRIE Johnson & Wales Case Study Competition & Publication Series*
*Editor, Journal of Hospitality & Tourism Cases*

Dear ICHRIE members and esteemed colleagues,

## Achievements in 2017

2017 represents another very successful year for both the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition and JHTC!

- the 2017 ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition continues to attract increasing interest from our community with an overall number of 20 case studies submissions in this year
- four case studies were also submitted directly and only to JHTC, which demonstrates a sustained growth and recognition of the journal as a publication outlet within our community

My sincere thanks to all those who have taken time and effort to submit a case study !

## News about the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition & the JHTC during 2017

2017 has been the sixth successful year of the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition and Publication Series. The top three case studies based on the scores of the peer evaluation process have been publicly recognized with prestigious best case studies awards. All the accepted case studies are published in the seventh volume of the Journal of Hospitality & Tourism Cases (JHTC) consisting of 4 issues. It is also great that both the quantity and the quality of the submitted case studies are improving every year, which is reflected in the continuous high acceptance rates and the high evaluation scores achieved by the majority of the case studies.

The seventh edition of the competition has attracted twenty case study submissions, while during the 2017, another four case studies have been submitted directly and solely to JHTC. It seems that the ICHRIE competition continues to be the major source of submissions for the JHTC, and so, increased efforts are still required to try to make the journal self-sustained in the future. To that end, it is now crucial and topical to invest time and effort to list JHTC in journal databases and ranking lists. Indeed, it is the right timing to do this, since JHTC has now achieved and proved the continual publication of seven volumes during the last seven years. This track publication record of JHTC can be a strong argument to support and justify the inclusion of JHTC in internationally recognized journal databases and rankings, since it provides a good evidence of the ability of the journal to have publication consistency of quality case studies. To that end, the time has arrived for promoting JHTC in such journal lists and growing its official recognition. The listing of JHTC in such journal rankings is expected to motivate more scholars to contribute and submit case studies for publication consideration in JHTC.

To further attract quality submissions from an international research body, it is also suggested that the responsible team of the competition and JHTC continues to deliver and organize case study workshops during the ICHRIE, APacCHRIE and EuroCHRIE conferences. The delivery of such workshops during the last years has been proven very useful, as it made a wider and international network of scholars aware of this publication opportunity, equipped them with the necessary knowledge and skills on how to write and use a case study for educational purposes as well as promoted JHTC and the case study competition to a wider international research community.

The increasing number of case study submissions also means that we continuously need a greater number of competent scholars to help with the review and evaluation process of case studies. To that end, the competition and JHTC are always open to volunteers who wish to help in reviewing constructive feedback to case study authors. Case study reviewers are always recognized for their efforts and time by becoming members of the editorial board and committee of the case study competition and JHTC (provided that the reviewers are also ICHRIE members, otherwise they are solely recognized by their name without inclusion in any committee/board). In addition, we also provide Best Reviewers' Certificates in order to recognize and award those reviewers that have demonstrated an outstanding performance in reviewing case studies for both the competition and JHTC. The Best Reviewers' Certificates are presented to the winners during the annual ICHRIE summer conference. The Best Reviewers' Certificates are another good way to recruit, but also to motivate existing reviewers to provide quality and constructive evaluations. The recognition and support to our reviewers are important, since the effective management of the review and evaluation process of the case studies is at the heart of maintaining the quality standards of the competition and JHTC.

## Aims and information about the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition and the JHTC

Case studies provide innovative ideas, business (best) practices, professional dilemmas, and lessons learned from the tourism and hospitality reality. In this vein, case studies are an invaluable source of knowledge for educators, professionals and researchers alike. Simultaneously, case studies can nurture and strengthen knowledge exchanges between research, education and industry. Overall, case studies are also a fruitful and valuable tool that can significantly enhance the quality of both the process and the outcomes of the teaching & learning methods.

In this vein, the aims of the case study competition and the JHTC include the following:

- enhance the services and benefits to all ICHRIE members
- offer an additional publication output of ICHRIE
- provide a new way for ICHRIE and its members to participate in the advancement of tourism & hospitality education
- foster and strengthen the communication between academia and industry within tourism and hospitality
- establish ICHRIE as a valuable source for the production of tourism & hospitality educational material
- reinforce the role of ICHRIE as a communication hub and as a facilitator of knowledge exchanges between research, academia and industry in tourism & hospitality.

Case studies submitted to the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition are double-blind assessed by three reviewers following a rigorous process. The three most highly evaluated and commented case studies receive prestigious financial and material prizes as well as recognition and promotion in the annual ICHRIE conference and other promotional material. In addition, all submitted case studies go through a double-blind review and revision process. Case studies accepted through this review process are published in the JHTC, which is part of the ICHRIE Johnson & Wales Case Study Publication Series.

More information about the competition (e.g. its rules, the submission guidelines) as well as guidelines and information about the submission deadlines for the 8th edition of the 2018 ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition are provided at the following website:

https://www.chrie.org/i4a/pages/index.cfm?pageid=3336

In addition, JHTC welcomes and is open to receive case study submissions at any point of time. Case studies go through a double-blind peer review process as soon as they are received, and provided that they get accepted until November, they are published in one of the issues of JHTC in the following year. **JHTC is an international refereed electronic journal (e-journal) that is published annually by ICHRIE. The mission of the JHTC is to distribute quality case studies to academics and professionals interested in using the case study method as a teaching, research and/or management tool. Case studies provide innovative ideas, business (best or failure) practices, professional dilemmas, and lessons learned from the tourism and hospitality reality. Hence, the JHTC is an invaluable source of knowledge providing understanding and lessons learned to tourism and hospitality academics, researchers, advanced students, and professionals alike.** For more information about the JHTC, the submission guidelines and the past journal issues please visit JHTC's website at:

https://www.chrie.org/i4a/pages/index.cfm?pageid=3333

## Submissions and acceptance rates

During the 2017, 24 case studies were submitted to both the 2017 7th edition of the Case Study Competition and to JHTC (Table 1). After the completion of the double-blind peer review process, 19 case studies were overall accepted for publication in JHTC giving a total acceptance rate in 2017 of 79.1%.

The case studies submitted this year represent a wide range of topics featuring more disciplines and more tourism/hospitality sectors. So, for example, in addition to the traditional tourism sectors (i.e. accommodation, F&B), this year, the case studies also refer to business problems related to other sectors such as events management, sports, airlines, theme parks and resort hotels. This is also an encouraging development, as the competition and JHTC now appeal to a wider community of scholars and researchers.

The 7th edition of the Case study competition shows a sustained growth of the competition since it started in 2011. Acceptance rates are also within the range of previous years, which also provides evidence of the focus of the competition to attract and maintain quality submissions. JHTC has also managed to maintain its direct submissions to the journal (irrespective of the case studies coming from the competition). The acceptance rate of JHTC in 2017 is also within the acceptance rates of previous years, which again provides evidence of the journal's commitment to maintain its publication quality standards. The latter is critically important for JHTC and its aim to be listed in journal databases and rankings.

*Table 1*

**Submissions and acceptance rates (2011, 2012, 2013, 2014, 2015, 2016 and 2017)**

| | 2011 (Number) | 2012 (Number) | 2013 (Number) | 2014 (Number) | 2015 (Number) | 2016 (Number) | 2017 (Number) |
|---|---|---|---|---|---|---|---|
| **Case studies** | | | | | | | |
| **ICHRIE Johnson & Wales Case Study Competition** | | | | | | | |
| Submitted Cases Studies | 8 | 22 | 15 | 31 | 22 | 33 | 20 |
| Accepted Case Studies | 6 | 22 | 14 | 27 | 21 | 30 | 17 |
| Acceptance rate | 75% | 100% | 93% | 87% | 95% | 90% | 85% |
| **JHTC** | | | | | | | |
| Submitted Case Studies | 3 | 7 | 7 | 9 | 13 | 2 | 4 |
| Accepted Case Studies | 1 | 5 | 3 | 6 | 12 | 1 | 2 |
| Acceptance rate | 33% | 71% | 43% | 67% | 92% | 50% | 50% |
| **TOTAL ANNUAL METRICS** | | | | | | | |
| Submitted Case Studies | 11 | 29 | 22 | 40 | 35 | 35 | 24 |
| Accepted Case Studies | 7 | 27 | 17 | 33 | 33 | 31 | 19 |
| Acceptance rate | 64% | 93% | 77% | 82.5% | 94% | 88.5% | 79.1% |

## Winners of the 2017 (7th) edition of the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition

It is my pleasure to present below and to publicly congratulate the following winners of the 2017 edition of the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition and Publication Series.

### First prize

**Aquis Great Barrier Reef Resort case**

*By Femke Vrenegoor, Sarah Seidel and Elena Cavagnaro, Stenden Hotel Management School, Academy of International Hospitality Research, the Netherlands*

### Second Prize

**Is Social Media Marketing a Necessary Evil?**

*By Eun-Kyong (Cindy) Choi, University of Mississippi, USA and Inna Soifer, University of Memphis, USA*

### Third Prize

**Wildlife Tourism as a Form of Ecotourism: The case of the Sacred Monkey Forest Sanctuary of Ubud, Bali**

*By Dominique Bragg, East Carolina University, U.S.A. and Cynthia S. Deale, East Carolina University, U.S.A.*

In addition, I would also like to extend my sincere congratulations and heartful thanks to the authors of all the case studies submitted to the 2017 ICHRIE Johnson & Wales Case Study Competition.

The competition was really very intense, standards and quality have risen substantially, and the evaluation scores of almost all submitted case studies have been above the usual average score of the previous years.

Congratulations to everyone and looking forward to your submissions in the next competition.

Finally, it is also my pleasure to announce the Best Reviewers for 2017 ICHRIE Johnson & Wales case study competition. Please join me to thank the following scholars for the great contributions and review feedbacks in evaluating case studies during the 2017:

*Robert M. O'Halloran, East Carolina University*

*Alistair Williams, Johnson & Wales University*

## Content of the four issues of Volume 7 of the JHTC

Volume 7 of JHTC includes all the 19 case studies submitted and accepted for publication in 2017. Volume 7 features four issues; 3 issues include 5 case studies and one issue includes 4 case studies. Each of the first three issues of JHTC starts by featuring one of the winning case studies; i.e. the first issue begins with the first wining case study; the second issue starts with the second wining case study, while third issue starts with the third wining case study. The case studies published in JHTC address various disciplines and management problems from the travel, tourism and hospitality sectors, including: marketing; sustainability; entrepreneurship; e-marketing; information and communications technology management; human resource management issues; operations management; internationalization and franchise management; financial management; destination management; tourism development and management; events management; food & beverage management; strategic management. Every issue of JHTC provides a collection of various case studies in order to satisfy researchers and educators with diverse interests and disciplinary backgrounds.

Each case study contains information and detailed analyses of the following issues: a) a background of the studied organization, des tination and/or of the topic; b) an analysis of the dilemma and/or the teaching objectives; c) a section explaining the questions and dilemmas of the case study; d) related bibliography and additional reading. Each case study is also followed by a teaching note that offers further help and instructions on how to best integrate the case study in instruction methods and on how to use it in the classroom. In particularly, the teaching notes provide fruitful guidelines in terms of the following: a) explanation of the teaching objectives and the target audience; b) the teaching approach and strategy recommended to be adopted by other educators; c) an analysis of the teaching objectives and the theoretical concepts; and d) any other additional reading and/or references.

## Recognitions and thanks

2017 is actually the last year that I am chairing the ICHRIE Johnson & Wales Competition and JHTC. The term of office of my position has ended, but, of course, I will continue to provide my support and contributions to the competition and the journal with great pleasure. It has been a privilege to have been given the opportunity to found, design, successfully implement and grow the case study competition and JHTC during the last seven years. This initiative has helped me to learn a lot, make new friends and associate with great collaborators. We were able to contribute something valuable to our community within which I have grown as a scholar and as a person, and which I love a great deal.

I would like to take this opportunity to heartfully thank all those that have supported me throughout these years by embracing my idea of the competition and the study and helping me to bring these projects into fruition and great growth. All ICHRIE staff (specifically Amie Grayson and Kathy McCarty), members of the ICHRIE and EuroCHRIE board, all authors and all the reviewers during the last seven years. You have all been so supportive and inspirational to me, and I highly appreciate it. Nothing would have been achieved without your contributions. I therefore ask please continue to serve the competition, JHTC and our community.

An international team of three distinguished researchers will support the competition and JHTC. I feel very happy to leave the competition and JHTC in such competent and dynamic hands. I am sure that the new team will lead and grow the journal and the competition even further. I will be supporting the new team during the 2018 as an advisory editor for JHTC and the competition, but of course, I will always be around to promote and grow them further.

It was my great pleasure and a privilege to have worked with all of you towards these projects. The continuous growth of the competition and the JHTC provide strong evidence of the positive outcomes of everyone's efforts.

Dear friends, dear colleagues, dear all, thank you so much for all your assistance and contributions during the last seven years and for supporting me to implement and grow the ICHRIE Johnson & Wales Hospitality & Tourism Case Study Competition and JHTC.

Enjoy reading Volume 7 of JHTC and do use the case studies in your teaching. The journal is created by you and for you!

Yours sincerely,

Prof Marianna Sigala

Chair, ICHRIE Johnson & Wales Case Study Competition & Publication Series

Editor, Journal of Hospitality & Tourism Cases

University of South Australia, Adelaide, Australia

# Wildlife Tourism as a Form of Ecotourism: The case of the Sacred Monkey Forest Sanctuary of Ubud, Bali

*By Dominique Bragg and Cynthia S. Deale*

## Introduction

Walking into Mandala Suci Wenara Wana, the Sacred Monkey Forest Sanctuary (Monkey Forest Ubud) in Padangtegal, Ubud, Bali, Indonesia around 7:30 a.m., the forest is just coming to life. The village, the traffic, and the hustle and bustle of the streets all fall away. Due to the forest, the sculptures, and the temples, entering Monkey Forest Ubud is like stepping back in time. Rays of sunlight peek through the trees and monkeys (in this case the monkeys are called macaques) are starting to come down from their sleeping sites in the treetops. As the guards prepare the monkeys' morning meal of cut and washed sweet potatoes, the monkeys' excitement and energy increase. During feeding, it is not uncommon for raucous scuffles to break out or to see a higher ranking adult macaque chase off a lower ranked adult or juvenile.

The Monkey Forest Ubud may be seen as an ecotourism destination and an interesting example of wildlife tourism. Although the definition of ecotourism is still contested, most researchers agree on and use the definition of ecotourism put forth by The International Ecotourism Society (TIES). TIES defines ecotourism as "responsible travel to natural areas that conserves the environment and improves the well-being of local people," (TIES, 1990; Koens, Dieperink, & Miranda, 2009). Ecotourism is promoted as responsible travel that demonstrates an appreciation for the environment and local culture, involves a non-consumptive use of nature (scenery, plants, and animals), and creates economic opportunities for the local community (Blamey, 2001). Whereas, wildlife tourism focuses on human interactions with non-domesticated (non-human) animals and intersects with other types of tourism, specifically nature-based tourism, special interest tourism, and ecotourism. Wildlife tourism can be seen as a type of ecotourism when it takes place within the framework of nature-based activities that offer environmental interpretation and embrace environmentally responsible practices (Higginbottom, 2004).

## Background

***Sustainable Tourism and Ecotourism in Theory and Practice.*** Ecotourism, nature tourism, wildlife tourism, and cultural tourism all fall under the larger umbrella of sustainable tourism. The United Nations World Tourism Organization (2017) defines the sustainable development of tourism as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities." Whereas a working definition of sustainable tourism is that, "Sustainable tourism contributes to a balanced and healthy economy by generating tourism-related jobs, revenues, and taxes while protecting and enhancing the destination's social, cultural, historical, natural, and built resources for the enjoyment and well-being of both residents and visitors" (East Carolina University, 2012). Common definitions of ecotourism emphasize responsible travel to natural areas that work to conserve the environment and improve the lives of the local population (Fuentes, Shaw, & Cortes, 2006). Conceptually, ecotourism implies that the conservation of natural resources, including wildlife, is compatible with socio-cultural contexts and economic development (Cater, 2004; Ross & Wall, 1999; Weaver, 2008; Weaver, 2002). Additionally, ecotourism is typically perceived as encompassing active engagement, inclusivity, education, and small-scale development (Cater, 2004). In general, wildlife tourism includes a wide range of activities from spotting animals from a bus, multiple-day hikes, hunting, fishing, seeing wildlife in captive situations such as zoos and wildlife sanctuaries, or visiting free-ranging wildlife attractions (Green & Higginbottom, 2000). In developing countries, with the rise of ecotourism, wildlife tourism has been encouraged as a way of balancing wildlife conservation and grassroots economic development (Campbell, 2002; Jones, 2005; Kontogeorgopoulos, 2005).

Sustainable tourism, ecotourism, and wildlife tourism can be comprehended from a variety of perspectives including actor-network theory (e.g. Rodgers, Moore, & Newsome, 2009), the concept of social capital (e. g Jones, 2005), and the stakeholder approach (Freeman, 1984) and theory (e.g. Byrd, 2007; Freeman, 1994; Freeman, Wicks, & Parmar, 2004; Hurrel & Kingsberg, 1992; Reed, 19 97; Vigor & Healy, 2002). Through the actor-network theory, the interests of all actors, human and non-human, are viewed and assessed equally for analysis (e.g. Rodger, Moore, & Newsome, 2009), while through the lens of social capital, the social networks formed in a community are the focus and via the interactions among those networks shared norms, trust, and reciprocity can be developed and then encourage cooperation toward achieving common goals (Ecclestone & Field, 2003; Harpham, Grant, & Thomas, 2002; Jones, 2005). The essence of the stakeholder approach and theory, which originated in the business arena with regard to the management of companies, is that the

**Dominique Bragg** *and* **Cynthia S. Deale** *are both affiliated with East Carolina University.*

interests of all parties involved need to be considered in the management of resources (Freeman, 1984). With respect to sustainable tourism, those parties can include the present visitors, future visitors, present host community, and future host community (Byrd, 2007), and within those four broad categories can be found tourists and such groups as "investor s, legislators, government agencies, environmentalists, the media, the scientific community, competitors, special interest groups, the general public, and local communities" (Manwa, 2003, p. 46). To effectively manage, maintain, and enhance sustainable tourism efforts, including those related to wildlife tourism in a particular area, all stakeholders need to work together in a cooperative manner; however, frequently the interests of the parties involved compete with each other and therefore, additional issues may arise due to the varied concerns and priorities of the parties involved (Lawrence, Wickins, & Phillips, 1997).

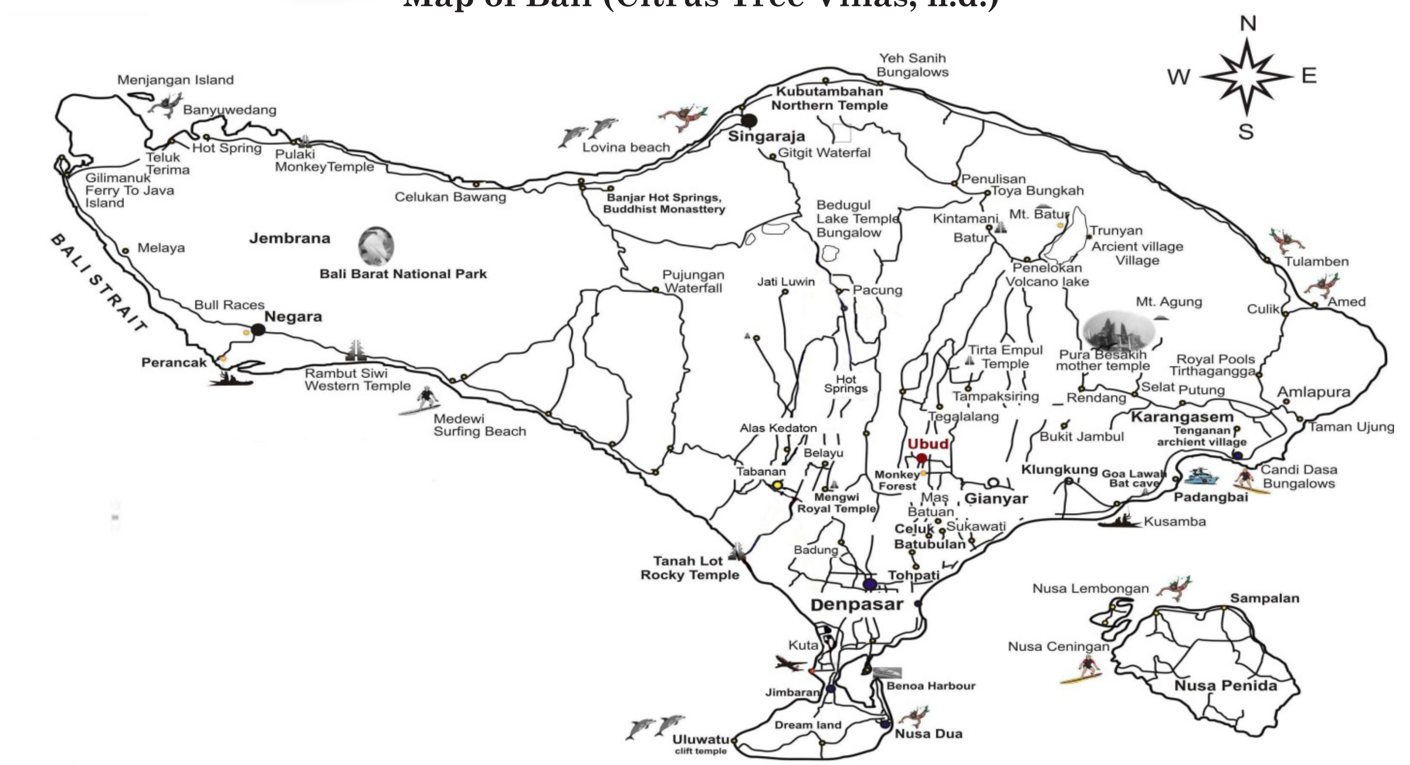
***The Archipelago of Indonesia.*** The country of Indonesia is the largest archipelago in the world composed of more than 17,000 islands. Indonesia is situated between the Pacific Ocean and Indian Ocean (Wheatley, 1999). The population of Indonesia was 258,316,051, as of a 2016 estimate (CIA, 2017). It is the largest Islamic country in the world with 87.2 % of the population Muslim, 7% Protestant Christian, 2.9% Roman Catholic Christian, 1.7% Hindu, 0.9% other (includes Buddhist and Confucian), and 0.4% unspecified (CIA, 2017). Indonesia is the fifth most populated country in the world with more than 250 ethnic groups, the fourteenth largest oil producer, and the most forested Asian country with 51.7% of the land covered in forests (CIA, 2017; Wheatley, 1999).

***Bali: The Isle of Light.*** The island of Bali is one of the 17,000 islands that make up the country of Indonesia; it is only 90 miles long and 50 miles wide, and yet it has over four million residents (The Bali Today, 2014). Bali is home to the majority of Indonesia's Hindu minority. Roughly, 93% of Bali's residents practice Balinese Hinduism. Bali has diverse terrain with volcanic mountains, lakes, rainforests, rice paddies, and beaches; the arc of active volcanoes is in the central eastern section of the island. Bali is divided into nine districts and has a rich cultural and artistic heritage with influences from India. Evidence of trade between India and Bali goes back to the first century B.C.E. Additional influences of India on Bali include Hinduism and its caste system, writing, the introduction of many Sanskrit words, and the arts. Balinese art forms with Indian influences encompass dance, palace and temple architecture, stone and wood carving, drawing, painting, and batik textiles (Wheatley, 1999). Each town or village typically specializes in a particular art form; all of Bali is filled with artistic mastery (Luchman, Kim, & Hong, 2009; Lansing, 1995; Vickers, 2012). See the map of Bali in Figure 1.

***Ubud: Bali's Cultural Center.*** The town of Ubud is located in the southeastern part of central Bali in the uplands, between the volcanic mountains and the sea. Ubud is in the district of Gianyar, one of the most fertile, best cultivated, and most densely populated districts in all of Bali.

***Figure 1***

**Map of Bali (Citrus Tree Villas, n.d.)**



It is also Bali's cultural center. The town of Ubud is both the cultural center of the district of Gianyar, and for all of Bali. Ubud is alive and thriving with culture and the arts. The Ubud Art Market, the shops, the nightly dances at the palaces, the restaurants, and the Sacred Monkey Forest Sanctuary are all parts of a greater whole that make Ubud a cultural center. Ubud's role as the cultural center creates a unique tourism product (MacRae, 2016).

***Mandala Suci Wenara Wana (Sacred Monkey Forest Sanctuary).*** The Sacred Monkey Forest Sanctuary, commonly referred to as Monkey Forest Ubud is in Padangtegal, a village in Ubud, Bali, Indonesia. The monkey forest is comprised of approximately 12.5 hectares (30.8 acres). There are three temples within Monkey Forest Ubud; the Main Temple (Pura Dalem Agung), the Cremation or Death Temple (Pura Prajapati), and the Holy Spring Temple (Pura Beji). Archeological analysis shows that the temples were built in the middle of the fourteenth century. The guiding principle of the Sacred Monkey Forest Sanctuary is the concept of Tri Hita Karana, a philosophy in Hinduism that centers on three means to attain spiritual and physical well-being (Monkey Forest Ubud, 2017). The principle of Tri Hita Karana illustrates the importance of maintaining three levels of harmonious relationships for the Balinese. The three levels of relationships include harmonious relationships between humans and the Supreme God, humans and humans, and humans and the environment. Through Tri Hita Karana, Monkey Forest Ubud conserves the natural environment by providing a protected sanctuary for Ubud's resident monkey population of macaques (Bali Around, 2017).

***The Balinese Long-Tailed Macaque.*** In general, the Balinese long-tailed macaque (Macaca fascicularis) is one of the more successful primate species in terms of its ability to live among human populations (Liedigk, et al., 2015). Commensalism or coexistence between humans and other wildlife is becoming the norm rather than the exception. As human populations continue to grow and spread out into previously untouched and uninhabited regions, humans will increasingly come into contact and conflict with other animals at varying degrees of intensity (Bonadio, 2000; Woodroffe, Thirgood, & Rabinowitz, 2005).

Monkey Forest Ubud is home to roughly 600 Balinese long-tailed macaques. They are split into six groups with overlapping territories within the forest and are one of the most widely distributed primates other than humans. The Balinese and the macaques have shared the island for a long time and as a result have a dynamic relationship. Monkeys feature prominently in the Ramayana, an Indian epic poem. One of the main characters from the epic poem is Hanuman, the monkey commander of the monkey army. Conservation efforts are a vital component of Monkey Forest Ubud. The principle of Tri Hita Karana and Balinese cosmology create a foundation for the conservation of the macaques and the forest (Monkey Forest Ubud, 2017).

***Management Structure of the Sacred Monkey Forest Sanctuary.*** The village of Padangtegal owns and has complete oversight over all decisions related to the Sacred Monkey Forest Sanctuary. The management structure for Monkey Forest Ubud has three levels. The upper level includes an advisory board and auditing board composed of individuals from the community and the "bendesa" or village leader who is elected by the community for a term of five years of service. The village leader is the direct supervisor of the general manager of Monkey Forest Ubud. The general manager oversees the finance, marketing, human resources, general affairs, and conservation divisions. Each division is responsible for a certain set of duties. The finance division deals with accounting, purchasing, and ticketing. The marketing department handles data, information, and publication; public relations; sales; and information and technology. Human resources and compensation and benefits fall under the purview of the human resources division. The general affairs department deals with a variety of entities including the first aid clinic, public area, cleaning service, security, parking, and maintenance. The conservation division focuses on the animals, plants, environment, and animal clinic (General Manager, (GM), personal communication, 2016).

***Tourism at Monkey Forest Ubud.*** Since Monkey Forest Ubud is owned and operated by the village of Padangtegal, all income generated from tourism to the monkey forest stays in the village and the monkey forest. According to the general manager of the monkey forest, in 2015, Monkey Forest Ubud had 2,828 visitors to the forest daily and 1,049,723 visitors total for the year (GM, personal communication, 2016). The forest's gross income was $29 billion IDR ($2,220,848.27 USD). The operating cost and government tax was $8 billion IDR ($612,650.56 USD). Overall, the village earned $21 billion IDR ($1,608,207.72 USD) in 2015 (GM, personal communication, 2016). The peak months for visitors to the monkey forest are January, July, August, and December. Most visitors are from Australia, China, Korea, France, and Russia (GM, personal communication, 2016). The Sacred Monkey Forest Sanctuary provides a combination of ecotourism, wildlife tourism, and cultural tourism within the larger context of its location in Ubud, Bali.

The specific type of wildlife tourism offered at the Monkey Forest Ubud is in the form of macaque tourism, which focuses on viewing and interacting with macaques in a free-ranging habitat and does not always fit all contexts of ecotourism. However, in the case of the Sacred Monkey Forest Sanctuary, macaque tourism to the site conserves both the natural environment and the wildlife within, provides economic benefit to the local community, and brings cultural awareness to visitors regarding the larger context of Balinese culture (Luchman, Kim, & Hong, 2009). Despite these benefits, there is also a potential for conflict along with the commensalism of humans and macaques at the monkey forest. Zhao (2005) defines commensalism as "a positive interaction between humans and macaques, with mutual benefits," while conflict is defined as "a relationship that can be physically injurious to both humans and the macaques" (Zhao, 2005).

## The Dilemma

Possible negative impacts at macaque tourism sites involve disease transmission, altering macaque physiology, behavioral conflicts, and economic conflicts. Macaques at Monkey Forest Ubud are provisioned by the staff of the monkey forest. However, visitors have the ability to buy bananas within Monkey Forest Ubud to feed to the macaques, providing them with an extra food source. Some visitors also bring in snack foods for themselves and either intentionally feed the macaques or the macaques steal the food. These snack foods, although a delicious treat for the macaques, are unhealthy and should not be consumed by the monkeys. This creates a potential problem as these treats can influence the body composition, health, and birth rates of the macaques. Prior to the implementation of the current feeding regimen, macaques were often overweight. The joint efforts of the monkey forest staff and field researchers to develop the current feeding regimen for the macaques has significantly improved the body composition and health of the resident macaque population. Behavioral conflicts and competition can arise as a result of the high degree of overlap between humans and macaques. The high level of interaction and physical contact between humans and macaques creates increased risk potential of macaques transmitting a pathogen to humans and vice versa. In addition, instances of aggression are common when food is involved. Acts of aggression, specifically biting, pose increased risk of disease transmission (e.g. Engel & Jones-Engel, 2011; Leung, Baird, Druce, & Anstey, 2015). Furthermore, economic outcomes from macaque tourism can generate conflict within the local community and between neighboring communities that may be losing income (Fuentes, 2010).

Monkey Forest Ubud also faces two additional dilemmas involving carrying capacity. Carrying capacity is the ability of a destination to effectively and efficiently manage the largest number of individuals within the boundaries of a particular area and limits of the management. When too many people visit a location and the space cannot accommodate the higher traffic flow, the carrying capacity of the destination is compromised, and the natural environment, local community, and economy are negatively impacted (O'Reilly, 1986). There are two separate issues related to carrying capacity at Monkey Forest Ubud. One issue involves the carrying capacity of the macaques while the other relates to the carrying capacity of the visitors to the monkey forest. In 2003, the macaque population was 220 individuals split into three multi-male/multi-female groups. As of May 2016, there were approximately 600 macaques living in six groups. Although the management team of the monkey forest recently purchased some additional land, making their total area approximately 14 hectares, the forest has maximized its growth potential. There is only so much land for the macaques to use within the boundaries of the forest. The forest is bounded by two towns, rice fields, a road, and two rivers (Fuentes & Gamerl, 2005). Additionally, under normal wild free-ranging circumstances, male macaques leave their natal groups at sexual maturity. At Monkey Forest Ubud, male macaques do not have that opportunity.

Several problems have developed because the macaque population is exceeding the carrying capacity of the forest environment. One problem is that additional stress is placed on the macaques that can lead to increased incidents of aggression toward other macaques, staff members, and visitors. Another problem is that the macaques venture farther and farther outside the boundaries of the monkey forest. It is not uncommon to see macaques directly across the street from the monkey forest or even further up Monkey Forest Road. Macaques will even make their way into nearby hotels, restaurants, and businesses.

The other carrying capacity issue at the Monkey Forest Ubud relates to the increasing number of tourists to the monkey forest and its surrounding vicinity. The management of the monkey forest has acquired additional land to expand the forest and has plans to build a new welcome center and facility offering art, culture, and sport. This expansion will most likely help to increase the number of visitors to the monkey forest. Increasing tourist numbers creates potential problems. Possible problems from increased visitors include increased pollution, theft, cultural conflict, and environmental damage.

## Analysis

Macaques exceeding the carrying capacity of their environment in the monkey forest can potentially lead to increased aggression of macaques toward other macaques, staff members, and tourists. Fuentes and Gamerl (2005) rated aggression on a scale of 1 to 4. Aggression 1 (AG1) acts were defined as simple threats, AG2 included lunging at or chasing with no contact, AG3 acts included physical displacement, and AG4 acts involved physical contact including bites (Fuentes & Gamerl, 2005). Bites are most likely to occur when food is present. The majority of biting incidents with visitors happen when the visitor is feeding a monkey or withholding food from a monkey. Banana carts within the forest are prime locations for the occurrence of acts of aggression. The frenzy and chaos that occur around the banana carts when tourists buy bananas to feed to the macaques are probably exciting and stressful for macaques and humans. Tourists often scream, yell, and jump when macaques climb up their bodies or leap onto them. Some even try to withhold bananas from larger adults to feed juveniles and infants. Attempting to withhold food is the easiest and quickest way to see aggression from a macaque. In most scenarios, tourists blame the macaque for the aggressive behavior they just received, even though in the majority of those scenarios the tourists are not correct.

Additionally, this increased potential for acts of aggression, specifically biting, that occur around feeding leads to increased risk of disease transmission. Several diseases are transmissible from monkeys to humans and vice versa (Engel & Jones-Engel, 2011; Leung, Baird, Druce, & Anstey, 2015). Receiving any form of aggression, especially a bite, is going to leave a visitor with a negative outlook on the macaques and his or her experience at Monkey Forest Ubud. Visitors who have negative experiences are more likely to leave negative reviews and encourage their friends and family not to visit, in turn negatively effecting tourism to the monkey forest (e.g. Nerd Nomad, 2016). Macaques surpassing the carrying capacity of the forest can also cause the animals to venture out beyond the boundaries of the forest. This movement of macaques outside of the forest boundaries can create problems for local businesses and also leave tourists with negative feelings about their experiences in Ubud. It is one thing to view and interact with the macaques within the monkey forest, which is the purpose of the monkey forest and why tourists add it to their itineraries; it is quite another to have to deal with macaques while walking down the street, eating lunch or dinner, shopping in a local shop, or seeing them in the hotel swimming pool.

The expansion and additions to the Sacred Monkey Forest Sanctuary will have some negative environmental and social impacts due to the increasing number of visitors. Possible negative environmental impacts include increases in pollution (from increased automobile and motorcycle traffic), solid waste, and energy and water expenditures. The potential social impacts to arise from the expansion and additions to the monkey forest involve potential conflicts with Padangtegal's neighboring village. The recently purchased land actually extends into this neighboring village. However, the residents of the village nearby do not have a say in any of the management decisions regarding the monkey forest nor will they reap the benefits of increased tourism to the forest.

## The Future of the Monkey Forest Sanctuary

The future of the Monkey Forest Sanctuary relies on cooperation between the forest management staff members, primatologists and ethnoprimatologists, ecologists, tourism specialists, tourists, and community members. Note that ethnoprimatologists can play an important role, for they frequently work in teams, and as Fuentes (2010, p. 601) notes, employ " a revised primatological practice—an inclusive view that places humans and all primates in an integrated, shared, ecological, and social space: a space that opens biological anthropology to input from other types of anthropology." Coordinated efforts of the aforementioned stakeholders are needed to help Monkey Forest Ubud continue to survive and thrive as a competitive tourist destination.

## Discussion Points and Questions

- What do you think are the major issues involved with wildlife tourism at the Monkey Forest Ubud and with wildlife tourism in general?
- Who are the stakeholders, public and private, that need to be included in the future plans for managing the Monkey Forest Ubud and what sorts of concerns might each group have and why?
- How can the staff members at the Monkey Forest Ubud deal with the increasing number of macaques?
- What are some positive impacts of the Monkey Forest Ubud expansion? How can the management team of the Monkey Forest Ubud maximize these positive changes?
- What are some negative impacts of the Monkey Forest Ubud expansion? How can these negative changes be minimized by the monkey forest management team?
- How can the management team ensure the forest expansion is done in a sustainable manner? What issues must be considered?
- What types of conflict between humans and macaques occur at the Sacred Monkey Forest Sanctuary? What other types of conflict occur between humans and wildlife around the world?
- What are some of the benefits of the current management structure of Monkey Forest Ubud?
- What are potential drawbacks to tourism in general?
- What suggestions do you have for the stakeholders to help the Monkey Forest Ubud have a successful future as a wildlife sanctuary and a sustainable tourism attraction?
- What experiences have you had or heard about with regard to wildlife tourism that involved both rewards and challenges and how do you think that this type of tourism can be sustainable?

## References


Bali Around (2017). Ubud monkey forest. Retrieved from http://www.baliaround.com/ubud-monkey-forest/.

Blamey, R. (2001). Principles of ecotourism. In D. B. Weaver (Ed.), Encyclopedia of Ecotourism (pp. 5-22). Brighton, UK: CAB International.

Bonadio, C. 2000. "Macaca fascicularis," Animal Diversity Web. University of Michigan. Museum of Zoology. Retrieved from http://animaldiversity.org/site/accounts/information/Macaca_fascicularis.html.

Byrd, E. T. (2007). Stakeholders in sustainable tourism development and their roles: applying stakeholder theory to sustainable tourism development, Tourism Review, 62 (2) 6-13, doi: 10.1108/16605370780000309.

Cater, E. (2004). Ecotourism: theory and practice. In A.A. Lew, C. M. Hall, & A.M. Williams, (Eds.). A Companion to Tourism, (pp. 484- 497). Malden, MA: Blackwell Publishing, Ltd.

Central Intelligence Agency (CIA) (2107). The world fact book. Retrieved from https://www.cia.gov/library/publications/the-world-factbook/geos/id.html

Citrus Tree Villas (n.d.). Mount Batur sunrise trekking tour at Ubud Citrus Tree Villas. Retrieved from http://www.citrustreevillas.com/img/tour_pack_map.jpg.

East Carolina University (2012). Center for Sustainable Tourism .Retrieved from http://www.ecu.edu/sustainabletourism/.

Ecclestone, K., & Field, J. (2003).Promoting social capital in a "risk society": A new approach to emancipatory learning or new moral authoritarianism? British Journal of Sociology of Education, 24(3), 267–282.

Engel, G. & Jones-Engel, L. (2011). The role of Macaca fascicularis in infectious agent transmission. Monkeys on the Edge: Ecology and Management of Long-Tailed Macaques and their Interface with Humans, Cambridge, UK: Cambridge University Press.

Freeman, R. E., Wicks, A. C., & Parmar, B. (2004). Stakeholder theory and "the corporate objective revisited". Organization Science, 15(3), 364-369.

Freeman, R. E. (1994).The politics of stakeholder theory: Some future directions. Business Ethics Quarterly, 4(4), 409-421.

Freeman, R. E. (1984). Strategic management: The stakeholder approach. Boston, MA; Pittman.

Fuentes, A. (2010). Naturalcultural encounters in Bali: Monkeys, temples, tourists, and ethnoprimatology. Cultural Anthropology, 25(4), 600-624.

Fuentes, A., Shaw, E., & Cortes, J. (2006). Qualitative assessment of macaque tourist sites in Padangtegal, Bali, Indonesia, and the Upper Rock Nature Reserve, Gibraltar. International Journal of Primatology, 28(5), 1143-1158.

Fuentes, A. & Gamerl, S. (2005). Disproportionate participation by age/sex classes in aggressive interactions between long-tailed macaques (Macaca fascicularis) and human tourists at Padangtegal Monkey Forest, Bali, Indonesia. American Journal of Primatology, 66(1), 197-204.

Green, R. J. & Higginbottom, K. (2000). The effects of non-consumptive wildlife tourism on free-ranging wildlife: a review. Pacific Conservation Biology, 6(3), 183-197.

Harpham, T., Grant, E., & Thomas, E. (2002). Measuring social capital within health surveys: key issues. Health Policy and Planning, 17(1), 106-111.

Hurrel, A., & Kingsberg, B. (1992). The international politics of the environment actors, interested and institutions. Oxford: Clarendon Press.

Jones, S. (2005). Community-based ecotourism: The significance of social capital. Annals of Tourism Research, 32(2), 303-324.

Koens, J. F., Dieperink, C., & Miranda, M. (2009). Ecotourism as a development strategy: Experiences from Costa Rica. Environment, Development, and Sustainability, 11(1), 1225-1237.

Kontogeorgopoulos, N. (2005). Community-based ecotourism in Phuket and Ao Phangnga, Thailand: Partial victories and bittersweet remedies. Journal of sustainable tourism, 13(1), 4-23.

Lansing, J. S. (1995). The Balinese. San Diego, CA: Harcourt Brace & Company.

Lawrence, T. B., Wickins, D., & Phillips, N. (1997). Managing legitimacy in ecotourism. Tourism Management, 18(5), 307-316.

Leung, G. H., Baird, R. W., Druce, J., & Anstey, N. M. (2015). Zika virus infection in Australia following a monkey bite in Indonesia. Southeast Asian Journal of Tropical Medicine and Public Health, 46(3), 460.

Liedigk, R., et al. (2015). Mitogenomic phylogeny of the common long-tailed macaque (Macaca fascicularis fascicularis). BMC Genomics, 16(1), 222-233. http://doi.org/10.1186/s12864-015-1437-0.

Luchman, H., Kim, J. E., & Hong, S. K. (2009). Cultural landscape and ecotourism in Bali Island, Indonesia. Journal of Ecology and Environment, 32(1), 1-8.

MacRae, G. (2016). Community and cosmopolitanism in the new Ubud. Annals of Tourism Research, 59(1) 16-29.

Manwa, H. (2003). Wildlife-based tourism, ecology, and sustainability: A tug-of-war among competing interests in Zimbabwe. The Journal of Tourism Studies, 14(2) 45-54.

Monkey Forest Ubud (2017). Retrieved from http://www.monkeyforestubud.com/.

O'Reilly, A. M. (1986). Tourism carrying capacity: Concept and issues. Tourism Management, 7(4), 254-258.

Reed, M.G. (1997). Power relations and community-based tourism planning. Annals of Tourism Research, 24(3), 566-591.

Rodger, K., Moore, S.A., & Newsome, D. (2009). Wildlife tourism, science and actor network theory. Annals of Tourism Research, 36 (4). 645-666.

Ross, S., & Wall, G. (1999). Ecotourism: towards congruence between theory and practice. Tourism management, 20(1), 123-132.

The Bali Today (2014). Bali Demographics. Retrieved from http://www.thebalitoday.com/bali/demographics/

The International Ecotourism Society (TIES) (1990). Ecotourism definition. Retrieved from http://www.ecotourism.org/book/ecotourism-definition

United Nations World Tourism Organization (2017). Sustainable development of tourism: Definition. Retrieved from http://sdt.unwto.org/content/about-us-5

Vickers, A. (2012). Balinese art: Paintings and drawings of Bali 1800-2010. North Clarendon, VT: Tuttle.

Vigor, G., & Healey, P. (2002). Developing environmentally respectful policy programmes: Five key principles. Journal of Environmental Planning and Management, 45(4), 517-532.

Weaver, D. (2008). Ecotourism. (2nd ed.). Hoboken, NJ: John Wiley and Sons.

Weaver, D. (2002). Asian ecotourism: Patterns and themes. Tourism Geographies, 4(2), 153-172.

Wheatley, B. P. (1999). The sacred monkeys of Bali. Prospect Heights, IL: Waveland Press, Inc.

Woodroffe, R., Thirgood, S., & Rabinowitz, A. (2005). The future of coexistence: resolving human-wildlife conflicts in a changing world. Conservation Biology Series-Cambridge, 9 (1), 388-395.

Zhao, Q.K. (2005). Tibetan macaques, visitors and local people at Mt. Emei: problems and countermeasures. In: Patterson J, Wallis J, (Eds.), Commensalism and conflict: the primate-human interface (pp. 376-399). Norman, OK: American Society of Primatologists.

*Wildlife Tourism as a Form of Ecotourism: The case of the Sacred Monkey Forest Sanctuary of Ubud, Bali*

## Summary of the Case

This case study describes the impacts of wildlife tourism and two issues of carrying capacity at the site of the Sacred Monkey Forest Sanctuary in Ubud, Bali, Indonesia. This special place is owned and operated by the village of Padangtegal and all income generated from tourism to the monkey forest stays in the village and the monkey forest. The Sacred Monkey Forest Sanctuary offers a combination of ecotourism, wildlife tourism, and cultural tourism within the larger context of its location in Ubud, Bali. Several sacred temples are located at the site and hundreds of wild macaques (monkeys) that tourists enjoy watching and feeding, live in the forest. This case reviews the potential problems that may arise as the resident monkey population continues to grow and more tourists visit the Sacred Monkey Forest Sanctuary.

## Teaching and Learning Objectives

Below are the teaching and learning objectives for this case.

1. ***Teaching Objective:*** Provide students with an opportunity to gain an understanding of macaque tourism, a specific type of wildlife tourism, and to increase their understanding of ecotourism in general.

   ***Learning Objective:*** Students will be able to clarify and illustrate definitions and types of wildlife tourism and ecotourism in general in their own words.

   The case achieves this objective by:

   - Use of language related to wildlife tourism and ecotourism and its many forms;
   - Monkey Forest Ubud as an example of a wildlife tourism and an ecotourism destination.

2. ***Teaching Objective:*** Offer students current information about current problems the Monkey Forest Ubud management team is facing and provide opportunities to address stakeholder issues.

   ***Learning Objective:*** Students will be able to describe the current problems facing the management team of the monkey forest and brainstorm possible solutions. The case achieves this objective via:

   - Providing recent information from 2015 and 2016 (tourism facts and figures) and 2016 (macaque population);
   - Providing some of the considerations and issues the forest management team needs to focus on as the forest expands, including the wishes and needs of different stakeholder groups.

3. ***Teaching Objective:*** Stimulate student discussion regarding human-macaque interactions, specifically, and human-animal interactions, in general; and the differing levels of coexistence between humans and animals.

   ***Learning Objective:*** Students will be able to critically examine different dynamics and levels of coexistence between humans and animals and how they impact one another. Specifically the case notes the following:

   - The Sacred Monkey Forest is one of several places where humans coexist with macaques;
   - Students may explore other places where humans come into contact and conflict with animals.

## Suitability for Use

This case is suitable for use by instructors and students in undergraduate and graduate courses related to tourism, wildlife tourism, ecotourism, primatology, ethonoprimatology, and human-animal interactions, in settings where the instructors want to provide students with opportunities to expand their knowledge of tourism's impact on wildlife and humans' and animals' impacts on each other.

## Sources and Methods of Collecting Information for the Case

Information for this case was collected via observations, personal communication with Monkey Forest Ubud's general manager, and reading website materials, books, and articles related to the topics presented in the case study.

## Teaching Approach and Suggested Sequence of Timeframe

Instructors may use this case in various ways. These involve using the case as:

- an individual assignment
- a group assignment
- a combination of individual and group activity
- a class discussion

As an individual assignment, the case study can be read and the discussion questions answered. During class, students could discuss and compare their answers. For a group assignment, students can read the case study and answer the discussion questions. Groups could be asked to find another example of wildlife tourism and write their own case study. A class discussion can be facilitated through assigning the students to read the case study and answer the discussion questions. Then over one or more class sessions, students could discuss and dissect the case. This could also be completed in a class scenario where the monkey forest case study is one of two or three examples of wildlife tourism, or more general ecotourism, read by the class and then discussed. The following questions might be asked to generate interest in the general topics related to the case.

Questions to Generate Interest

- What is sustainability?
- What is sustainable tourism?
- What is ecotourism?
- What is wildlife tourism?
- What other forms of tourism fall under the umbrella of ecotourism?
- What are some of the positive impacts of the current management structure of Monkey Forest Ubud?
- What are the potential drawbacks of wildlife tourism?

## Topics and Questions for Discussion

*What do you think are the major issues involved with wildlife tourism at the Monkey Forest Ubud and with wildlife tourism in general?*

Answers will vary and this question could provide an opportunity for a general forum in which to discuss a number of ecotourism issues. Wildlife tourism issues include those mentioned in the case such as negative human-wildlife interactions, damage to resources, pollution, crowding and other carrying capacity issues, etc.

*Who are the stakeholders, public and private, that need to be included in the future plans for managing the Monkey Forest Ubud and what sorts of concerns might each group have an why?*

Answers will vary. As noted in the case, the stakeholders include all parties with an interest in the forest. For the purposes of sustainable tourism, the parties can include the present visitors, future visitors, present host community, and future host community (Byrd, 2007) and groups such as "investor s, legislators, government agencies, environmentalists, the media, the scientific community ,competitors , special interest groups, the general public, and local communities"(Manwa, 2003, p. 46). Their concerns may include issues raised in the previous question and also involve more specific issues related to environmental, economic, and socio-cultural aspects of management of the monkey forest.

*How can the staff members at the Monkey Forest Ubud deal with the increasing number of macaques?*

Answers will vary. The monkey forest management team could implement non-lethal strategies to help control the macaque population through birth control measures, hysterectomies of the female macaques and/or vasectomies of the male macaques. The management team could also opt to translocate several individuals to other forest areas in Bali. It is highly unlikely that the forest management team would try to implement lethal measures given the forest's governing doctrine of Tri Hita Karana and its standing in conservation and research communities.

*What are some positive impacts of the Monkey Forest Ubud expansion? How can the management team of the Monkey Forest Ubud maximize these positive changes?*

Some of the positive impacts of the forest expansion include an increase in the number of visitors to Monkey Forest Ubud and in turn increased revenue for the village of Padangtegal. Additionally, the forest expansion may also provide increased incentive to conduct conservation, research, and educational agendas.

*What are some negative impacts of the Monkey Forest Ubud expansion? How can these negative changes be minimized by the monkey forest management team?*

Although an increase in the number of visitors to Monkey Forest Ubud can be considered a positive impact of the forest expansion, it also has negative impacts. Some of the negative impacts include exceeding carrying capacity, degradation of the environment, pollution, and increased burden on the trash removal, sewer systems, and other resources due to the increased number of visitors. In addition, the expansion of the forest provides the macaques with new areas to explore and to come into conflict with tourists. The expansion is spilling over into the neighboring village; however, that village is not reaping any of the financial benefits and therefore, this situation may lead to conflicts between the two villages.

*How can the management team ensure that the Monkey Forest Ubud expansion is done in a sustainable manner? What issues must be considered?*

Answers will vary. It is important for the management to consider the natural environment and how the forest expansion and disruption will affect the macaque population within the Sacred Monkey Forest. It is also vital for the management team to improve informational and educational materials for visitors around the forest, distributed upon entrance, and on their website. Enhancing the trash and recycling containers throughout the monkey forest to facilitate easier disposal of various items is necessary as well.

*What types of conflict between humans and macaques occur at the Sacred Monkey Forest Sanctuary? What other types of conflict occur between humans and wildlife around the world?*

Answers will vary. There are several types of conflict between humans and macaques in the Sacred Monkey Forest Sanctuary. One type of conflict involves the acts of aggression by the macaques ranging from mild forms such as simple threats; moderate forms such as lunging at, chasing with no contact, or physical displacement; and more severe forms involving physical contact including bites. Another kind of conflict involves humans either intentionally or unintentionally antagonizing the macaques. A greater understanding of macaques could decrease both kinds of conflicts.

Wildlife viewing is popular in many places, including across the United States (U.S.), and unfortunately, conflicts between humans and wildlife are not uncommon. These conflicts in the U.S. involve interactions between tourists and a variety of animals such wolves in Yellowstone National Park (e.g. Montag, Patterson, & Freimund, 2005), black bears and other wildlife in the Great Smoky Mountains National Park (Gray, 1993), and manatees in Florida (Sorice, Shafer, & Ditton, 2006).

Around the globe, wildlife tourism is also popular. Viewing wildlife is particularly popular with tourists in Africa and issues often revolve around observing the animals termed the "big five." These species include elephants, buffalo, rhinoceroses, lions, and leopards and while they are the most popular with tourists, they are also seen as the most expensive to preserve (Lindsey, Alexander, Mills, Romañach, & Woodroffe, 2007).)

*What are some of the benefits of the current manage**ment** structure of Monkey Forest Ubud?*

The greatest benefit to the current management structure of Monkey Forest Ubud is that the local community reaps all of the benefits. Additionally, given the structure of the management team, in that it is composed entirely of members from the community, there is great incentive to ensure the success of the monkey forest through the protection of the natural environment and macaques of the monkey forest, as well as the culture of the Balinese people.

*What are potential downsides of wildlife and macaque **tourism?***

Answers will vary. Some of the potential downsides to wildlife and macaque tourism are the degradation of the natural environment and potential harm that may come to the wildlife as a result of close proximity to humans. Additionally, the close proximity of humans to wildlife such as macaques can increase the potential for injuries to humans. In the case of the Monkey Forest Ubud, it is common for both guards and tourists to experience being bitten by macaques. Although in many of the biting incidents, it is the fault of the human and it usually involves withholding food or getting too close to an infant or juvenile macaque.

*What suggestions do you have for the stakeholders to help the Monkey Forest Ubud have a successful future as a wildlife sanctuary and a sustainable tourism attraction?*

Answers will vary. Answers need to consider a framework for planning and managing wildlife tourism and the goals of wildlife tourism, including sustainability and maximizing benefits (Higginbottom, 2004, p. 5). Costs and benefits of macaque tourism at the monkey forest need to be identified (Ballantyne, Packer, Hughes, & Dierking, 2007) and strategies for managing people as well as animals need to be considered (Burns & Howard, 2003 ). Identifying the needs and wants of all stakeholders and developing plans that include guidelines for visitors to the monkey forest might serve as starting points for further discussion about what these specialists might do to assure the future of the monkey forest (e.g. Nerd Nomad, 2016).

*What experiences have you had or heard about with regard to wildlife tourism that involved both rewards and challenges and how do you think that this type of tourism can be sustainable?*

Answers will vary.

## Suggestions for Additional Reading Material


Ballantyne, R., Packer, J., & Falk, J. (2011). Visitors' learning for environmental sustainability: Testing short-and long-term impacts of wildlife tourism experiences using structural equation modelling. Tourism Management, 32(6), 1243-1252.

Ballantyne, R., Packer, J., & Hughes, K. (2009). Tourists' support for conservation messages and sustainable management practices in wildlife tourism experiences. Tourism Management, 30(5), 658-664.

Ballantyne, R., Packer, J., & Sutherland, L. A. (2011). Visitors' memories of wildlife tourism: Implications for the design of powerful interpretive experiences. Tourism Management, 32(4), 770-779.

Burns, G. L., & Howard, P. (2003). When wildlife tourism goes wrong: a case study of stakeholder and management issues regarding Dingoes on Fraser Island, Australia. Tourism Management, 24(6), 699-712.

Curtin, S. (2009). Wildlife tourism: the intangible, psychological benefits of human–wildlife encounters. Current Issues in Tourism, 12(5-6), 451-474.

Higginbottom, K. (Ed.) (2004). Wildlife tourism. Altona, Australia: Common Ground.

Orams, M. B. (2002). Feeding wildlife as a tourism attraction: a review of issues and impacts. Tourism Management, 23(3), 281-293.

Reynolds, P. C., & Braithwaite, D. (2001). Towards a conceptual framework for wildlife tourism. Tourism Management, 22(1), 31-42.

Sekhar, N. U. (2003). Local people's attitudes towards conservation and wildlife tourism around Sariska Tiger Reserve, India. Journal of Environmental Management, 69(4), 339-347.


## References


Ballantyne, R., Packer, J., Hughes, K., & Dierking, L. (2007). Conservation learning in wildlife tourism settings: Lessons from research in zoos and aquariums. Environmental Education Research, 13(3), 367-383.

Burns, G. L., & Howard, P. (2003). When wildlife tourism goes wrong: a case study of stakeholder and management issues regarding Dingoes on Fraser Island, Australia. Tourism Management, 24(6), 699-712.

Gray, G.G. (1993). Wildlife and people. Urbana, Illinois: University of Illinois Press.

Higginbottom, K. (2004). Wildlife tourism: An introduction. In K. Higginbottom (Ed.), Wildlife tourism, (p.1-14). Altona, AUS: Common Ground.

Lindsey, P. A., Alexander, R., Mills, M. G. L., Romañach, S., & Woodroffe, R. (2007). Wildlife viewing preferences of visitors to protected areas in South Africa: implications for the role of ecotourism in conservation. Journal of Ecotourism, 6(1), 19-33.

Montag, J. M., Patterson, M. E., & Freimund, W. A. (2005). The wolf viewing experience in the Lamar Valley of Yellowstone National Park. Human Dimensions of Wildlife, 10(4), 273-284.

Nerd Nomad (2016). Getting attacked by monkeys in monkey forest Ubud, Bali. Retrieved from https://nerdnomads.com/monkey-forest-ubud-bali

Sorice, M. G., Shafer, C. S., & Ditton, R. B. (2006). Managing endangered species within the use–preservation paradox: The Florida manatee (Trichechus manatus latirostris) as a tourism attraction. Environmental Management, 37(1), 69-83.

# Wheelchair Friendliness Versis Compliance in the Hospitality Industry

*By Cynthia Mejia*

## Preparation

Prior to reading the case and preparing the related project, students should first become familiar with any local, regional, or national accessibility guidelines for accommodating guests in wheelchairs or other power-driven mobility devices. In the United States, these may include:

- https://www.ada.gov/ada_title_III.htm
- https://www.ada.gov/regs2010/2010ADAStandards/2010ADAStandards.pdf
- https://www.ada.gov/opdmd.htm
- https://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-ada-standards/background/adaag

### *Helpful wheelchair travel blogs include:*

- http://wheelchairjimmy.com/
- https://wheelchairtravel.org/
- https://www.ricksteves.com/travel-tips/trip-planning/travelers-with-disabilities

## Introduction

The National Institutes of Health is an agency of the United States (U.S.) Department of Health and Human Services, which has estimated 53 million Americans have a disability of some type. Of those, 3.3 million people depend on a wheelchair for mobility, while 6.5 million utilize a cane, walker, or crutches to assist with their physical mobility. In 2015, over 1.8 million American wheelchair users were age 65 and over, and by 2030, almost 70 million persons in the U.S. will be age 65 or older, or nearly 20% of the population. As the U.S. population continues to age, it is estimated that 2 million people will become new wheelchair users each year (Reznik, 2015).

### *The United States Access Board & The Americans with Disabilities Act (ADA)*

The United States Access Board was created in 1973 as a governing body which reports to the White House and is responsible for developing and updating design guidelines for the ADA. Half of its board members are from related federal departments, while the other half are appointed by the U.S. President, the majority of whom must have a disability of some type (https://www.access-board.gov/). These members are responsible for representing people with disabilities and providing technical assistance and training. All ADA guidelines administered by the U.S. Access Board are enforced by the U.S. Department of Justice and the Department of Transportation, which the public must follow.

The Americans with Disabilities Act (ADA) was enacted on July 26, 1990 in the U.S., and is a civil rights law prohibiting discrimination based on a disability (http://adata.org/publication/disability-law-handbook). The law ensures that public entities must evaluate their own programs, services, and policies in accordance with 5 titles of the ADA including: Title 1. Equal employment; Title 2. Nondiscrimination of state and local services; Title 3. Nondiscrimination by public accommodations and commercial facilities; Title 4. Telecommunications and relay services; and Title 5. Miscellaneous provisions made in relationship to other laws and insurance benefits. Services pertaining to the hospitality and tourism industry fall under Title 3.

In 2008, several ADA amendments became law which made many changes to the interpretation of a "disability", and since then two major updates to the law greatly impacted the U.S. hospitality industry in 2010 and 2012. Areas updated included recreational designs such as those for amusement rides, exercise machines, golf facilities, play areas, saunas, steam rooms, swimming pools, and spas. In addition, incremental changes to the 1991 standards affected children's' accessibility, door clearance, ramps, parking spaces, elevator access, passenger loading zones, bathroom requirements, handrails, detectable warning systems, and transient lodging guest room accommodations (https://adata.org/factsheet/standards). In 2010, the mandatory updates impacting the U.S. hospitality industry were most significant for small business, giving special considerations and "safe harbor" allowances for buildings older than 20 years. However, newer buildings not falling under the 20-year allowance had to comply, or faced litigation by the U.S. Department of Justice. The new 2010 standards would go into full effect on March 15, 2012. Later, these deadlines were extended to January 31, 2013 to meet full compliance of the original 2010 standards, especially targeting hospitality facility parking spaces, pool lifts, ramps, and handrails.

### *ADA Compliance Versus "Friendliness"*

Globally, it is estimated that 1.3 billion people have a disability, and that another 2.2 billion are their friends and family members. Combined, this group accounts for over US$8 trillion disposable income on an annual basis (Stancu, 2017). Of those with a disability, 70-80 million

**Cynthia Mejia** *is affiliated with University of Central Florida.*

people use a wheelchair (https://www.motivation.org.uk/). While not all might be active travelers, even a small percentage would have serious implications on a hospitality organization ill-prepared to meet and exceed the needs of this rapidly expanding group of travelers.

As it pertains to the hospitality industry, the difference between ADA compliance (adherence to law) and friendliness (welcoming and user-friendly) may either repel or attract wheelchair guests and their traveling companions to a business. Given the service-centered focus of the hospitality industry, it would seem obvious that a hotel, restaurant, airport, cruise ship, etc., would strive to meet and exceed wheelchair guests' expectations. Yet, anecdotal reports and research suggests otherwise. In the U.S., while ADA compliance is regulated and monitored by law, many hospitality operators struggle to fund large capital improvement projects aimed toward meeting ADA compliance. To illustrate, some small operators must make decisions to close a pool or spa until a wheelchair accessible lift can be afforded. Other businesses who are able to pay for these accommodations might choose to reduce expenditures by only complying with the bare minimum ADA provisions, rather than spending additional funds to incorporate more decorative features in a hotel guest room or bathroom, for example.

There are certainly a wide variety of travelers included in the wheelchair demographic, with preferences ranging from basic to high-end amenities in the lodging, food and beverage, and attractions sectors. Yet the question remains, are all of these strata of preferences and expectations being met and exceeded in this growing segment of travelers?

### Theoretical Perspective

Self-Determination Theory (SDT) is a broad-range theory of human motivation and personality concerned with how people's intrinsic motivations and development promote social development and well-being (Deci & Ryan, 1985). As a fundamental right, self-determination allows individuals total control of their lives in which accessibility is key toward reaching goals, decision making, and living and working in a community. SDT is largely concerned with the contextualized social conditions which enhance self-motivation (Ryan & Deci, 2000).

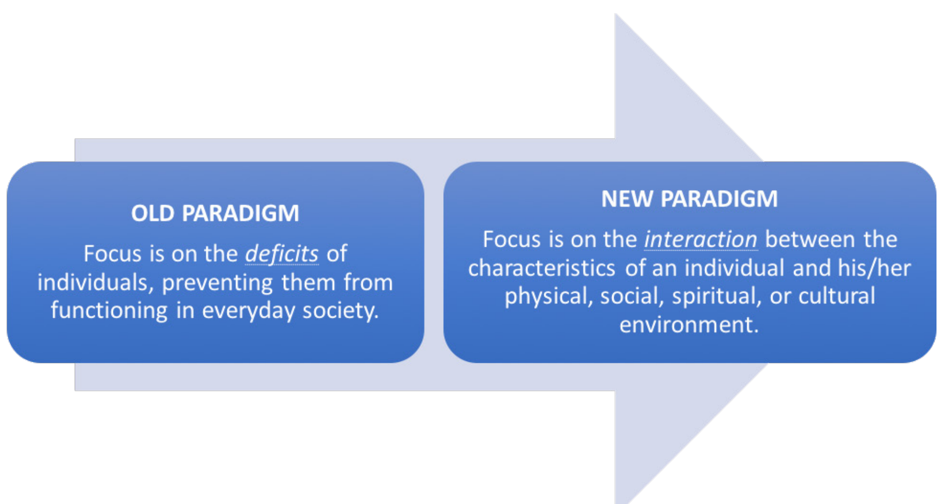
The National Institute on Disability and Rehabilitation Research (NIDRR) was established by the U.S. Congress in 1986, formally known as the National Institute of Handicapped Research. Due to research initiatives over the past 30 years, persons with disabilities in the U.S. have a better quality of life, live longer, and enjoy a wide variety of activities, including travel. The NIDRR has achieved numerous advances in research including the development of a new paradigm of disability (Accessible Society, n.d.). The old paradigm or view of disability focused on the deficits of individuals, which prevented them from functioning in everyday society. The new paradigm proposes that disability is an interaction between the characteristics of an individual and his or her physical, social, spiritual, or cultural environment (Temple University Collaborative, n.d.) (see Figure 1).

This shift away from the perceived deficits of an individual towards accommodation and inclusion is said to encourage self-determination by removing barriers, thus enabling access and greater equality for all people. The current definition of disability under the ADA is still individual focused, even though the law promotes and regulates accessibility. Given that large government bureaucracies move slowly to encompass and incorporate new ideas and definitions, it will be essential for innovative service organizations to learn about and adopt the new disability paradigm to achieve high service levels for all guests. Hospitality organizations are well-suited to be among the first to view a disability in terms of

***Figure 1***

**Paradigm shift of disability towards accommodation and inclusion**

*(Accessible Society, n.d.; Temple University Collaborative, n.d.)*



a deficient environment, rather than a guest's perceived "impairment".

### *Wheelchair Jimmy*

Mr. Jim Parsons (aka "Wheelchair Jimmy") has traveled extensively throughout his life to 5 continents and close to 40 countries for business and leisure. Jim has also used a wheelchair since age 20, for over 48 years. Based on his own travel experiences throughout the years, Jim developed a website (http://wheelchairjimmy.com/) for wheelchair travelers who wish to visit restaurants or hotels, complete with videos, detailed accessibility guides, and his own rating system known as the "WJAR", or Wheelchair Jimmy's Accessibility Rating. The WJAR is based on a system of stars, from one to five, where a one or two-star rating of a restaurant or hotel signals compromised wheelchair accessibility, and star ratings of three to five signify wheelchair accessibility, friendliness, and "best in class", respectively. While not affiliated with the ADA, Jim's WJAR ratings mostly evaluate wheelchair "friendliness" based on his own criteria.

Jim's accessibility ratings differ between restaurants and hotels due to their structures and intended purposes. For example, WJARs for hotels focus on the presence or absence of entry ramps or steep hills, accessibility to lobby restrooms and elevators, the presence or absence of small hydraulic lifts, furniture and bed height, ease of bed transfer (space between the bed and the nearest wall or furniture), the number of wheelchair accessible guestrooms with accessible restrooms, and the presence or absence or roll-in showers. According to Jim, there are no current industry-wide standards for the specifications of a roll-in shower. Often, roll-in showers have compromised seating, inaccessible water controls, and/or poor drainage. Hotels receiving poor WJARs from Jim are those with small hydraulic lifts on property and/or poorly designed roll-in showers (or no roll-in shower).

Accessibility ratings for restaurants on Jim's website also range from one to five stars, with similar strata as for hotels. One and two WJAR stars designate restaurants with inaccessible steps or restrooms, presence of hydraulic lifts, or may require wheelchair guests to enter into the restaurant through back alleys or kitchens, and may also necessitate the use of an employee restroom. Three star WJARs denote wheelchair accessible restaurants, with four and five stars distinguishing friendly, and best of class establishments, respectively.

While Jim is an advocate for wheelchair accessibility, he also acknowledges that not all properties will be (J. Parsons, personal communication, March 26, 2017). Citing many beautiful landmarks, "brownstone" buildings, and old Victorian architecture, Jim appreciates the history of these hotels and restaurants, but would prefer to know in advance before attempting to enter. Jim is also not opposed to visiting one and two WJAR star hotels and restaurants, he just wants to be informed and to inform others as to the property's accessibility. Finally, Jim is concerned on occasions when front line employees in hotels and restaurants do not know about nor understand ADA compliance, and the special wheelchair accessible features within their establishment. In an effort to relay helpful wheelchair accessible information about hotels and restaurants, Jim's website has developed over time to include the following destinations: Seattle, San Francisco, Los Angeles, Phoenix, Las Vegas, Chicago, Washington D.C., Boston, Cincinnati, Indianapolis, Charleston, Savannah, the Oregon Coast, Orlando, the Pacific Northwest, and international destinations including New Zealand and South America.

## Discussion Questions

- Given the updates to the ADA for hospitality facilities over the years, what are the typical costs for compliance of an exterior entrance ramp, an interior ramp, a swimming pool chair lift, and bathroom modifications? What are the differences in costs between an existing building and new construction?
- How can a hospitality business operator/firm calculate the return on investment (ROI) of an ADA compliance cost?
- What are both the tangible and intangible consequences in your region for non-compliance of mandated ADA statutes in the hospitality industry?

## The Project

**Part One: Create a list of ADA-related criteria and categorize according to compliance vs. friendliness.** Choose a hotel, restaurant, or any other public service area (i.e. airport, conference center, train station, theme park, etc.) of interest. Based on individual research, organize a checklist of compliance as it pertains to your facility of choice. There are a variety of such checklists available on the Internet including those directly from the ADA (http://www.adachecklist.org/doc/fullchecklist/ada-checklist.pdf); however, numerous other blogs, web pages, law firms, and even smartphone apps, are widely available to compose a basic list of compliances. Be certain to ensure that the list developed relates directly to the public service area of choice. In terms of friendliness, consult Wheelchair Jimmy's website (http://wheelchairjimmy.com/wheelchair_accessibility_rating_overview/) for additional features that help or hinder wheelchair mobility in an establishment.

In addition, prepare a table with at least 10 ADA-based criteria in the hospitality industry, and categorize the criteria in terms of compliance vs. friendliness. For those criteria deemed "compliant" or non-existent, please offer suggestions as to how these could be more user-friendly (see table below as an example).

**Part Two: Visit and evaluate an establishment.** Organize a visit to your chosen hospitality service area and have a look around the facility. Does it meet or exceed the criteria as stated in your list of compliances? Take notes, and if given permission, take some photos of the facility, particularly in the areas most challenging for wheelchair navigation. Prepare a report of the facility based on your findings.

**Part Three: Create a 2-3-minute video with a partner, which**

| ADA Criteria | Facility Type | Compliant/Friendly | Suggestions to Increase Friendliness |
|---|---|---|---|
| Bed height | Hotel | No ADA criteria | Suggested bed height is 20-23" with reference to a 19" wheelchair seat. Suggest 19" for easy transfer from chair to bed. (https://dredf.org/anprm/beds-in-accessible-sleeping-rooms.shtml) |
| Bar stool height | Restaurant | No ADA criteria | Suggest accessible low tables in the bar so chairs can roll up; table height is mandated at 28-32" by ADA. (https://www.katom.com/cat/furniture/dining-room-ada-compliant.html) |

**includes the use of a wheelchair.** Carefully solicit permission from a manager of a hotel, restaurant, or other public facility to participate in an informal audit for wheelchair friendliness. A letter of request will be furnished by the instructor. Organize this informal audit during down-times for the establishment so as not to impede the flow of business. If possible, obtain permission to enter wheelchair accessible hotel rooms. Do not be discouraged if at first some managers disagree with the informal audit. After carefully explaining to industry professionals the purpose of the project, and how the information will be collected and graded, with the support of the instructor, most hospitality professionals are very happy to participate. Alternatively, the instructor may obtain permission preceding the project and therefore a list of agreeable businesses might already be available.

For this part of the project, you and your partner will need to have access to a wheelchair. If not pre-arranged by the instructor, numerous hotels often carry wheelchairs. In addition, local wheelchair rental businesses can be contacted for use of a wheelchair. It is important that you use a wheelchair and not a motorized scooter. With the permission of the establishment's manager, prepare a short 2-3-minute video from the perspective of the wheelchair. For example, begin filming outside in the parking lot and with the help of your partner, enter the building. From the entrance, try to engage with a host(ess) or concierge. If in a hotel, visit the lobby restroom. If in a restaurant, visit the restroom and the bar area. Take notes of any obstacles including uneven flooring surfaces, difficult ramps, small restrooms, configurations of elevators, walkways, and hallways. In general, try to access as many features of the establishment as possible, including an actual hotel room and bathroom.

According to your instructor's grading criteria, create a video to share with the class pointing out those compliant versus friendly wheelchair accessible features of your chosen establishment. For examples of possible formats, please see the following videos on Wheelchair Jimmy's website:

- Restaurant example: https://www.youtube.com/watch?v=u8d89YbKeV0
- Hotel example: https://www.youtube.com/watch?v=cxO7mwpc3tQ

**Part Four: Reflection activity.** Based on your experiences during this project, please answer the following questions either submitted as a video or in written form:

- What did you learn about ADA wheelchair compliance in this project?
- What did you learn about wheelchair friendliness in this project? What are some recommendations you could make to your venue for improving wheelchair friendliness?
- How might the new paradigm for disability, according to the NIDRR, impact future changes to the ADA criteria in a hospitality business, based on what you have seen?
- What did you execute well in this project? If you could do this project again, what would you do differently?
- What recommendations could you make to the instructor for improving the project?

## Additional Readings and References


Accessible Society. (n.d.). The 'New Paradigm' of disability. The Center for an Accessible Society [Online]. Retrieved from http://www.accessiblesociety.org/topics/demographics-identity/newparadigm.htm

Deci, E. L. & Ryan, R. M. (1985). Intrinsic Motivation and Self-Determination in Human Behavior. New York: Plenum.

NIH. (2017). Rehabilitative and assistive technology: How many people use assistive devices? NIH Eunice Kennedy Shriver National Institute of Child Health and Human Development [Online]. Retrieved from https://www.nichd.nih.gov/health/topics/rehabtech/conditioninfo/Pages/people.aspx

Resnik, R. (2015). Wheelchair facts, numbers and figures [Infographic]. SmartChair by Kd Healthcare Company USA [Online]. Retrieved from https://kdsmartchair.com/blogs/news/18706123-wheelchair-facts-numbers-and-figures-infographic

Ryan, R. M. & Deci, E. L. (2000). Self-Determination Theory and the facilitation of intrinsic motivation, social development, and well-being. American Psychologist, 55(1), 68-78.

Stansu, H. (2017). Seeking a better deal for disabled travelers. Toronto Star [Online]. Retrieved from https://www.pressreader.com/canada/toronto-star/20170114/283412011392904

Temple University Collaborative. (n.d.). Self-determination. The Temple University Collaborative on Community Inclusion of Individuals with Psychiatric Disabilities [Online]. Retrieved from http://tucollaborative.org/community-inclusion/community-inclusion/self-determination/

# teaching note

*Wheelchair Friendliness Versis Compliance in the Hospitality Industry*

## Summary

The case begins with a statistical introduction as to the number of Americans who have a disability, with a specific focus on wheelchair users. The function of the United States Access Board and its relationship to the Americans with Disabilities Act (ADA) is introduced, followed by the amendments proposed in 2008, 2010, and 2012 specific to hospitality businesses. A global perspective of wheelchair users and their annual disposable income is presented, which leads into a discussion on ADA compliance versus friendliness and the potential among hospitality business owners and operators to meet and exceed the service needs of this increasingly expanding global population.

Self-Determination Theory (SDT) is presented to describe the fundamental right of all humans, which allows for total control of our lives, decision-making capabilities, and assimilation into a community. A new paradigm of disability is introduced, which contrasts a previous definition and perspective of what it means to have a disability. The definition proposed by the National Institute of Disability and Rehabilitation Research (NIDRR) describes a disability in terms of an interaction between an individual and his or her environment, rather than the perceived "impairments" of an individual. This shift toward inclusion for all travelers has implications on service providers and their future business growth.

The website "wheelchairjimmy.com" is used as a platform to contextualize ADA regulations with the most common concerns of wheelchair travelers. Proprietary accessibility ratings are discussed and used as examples across several criteria for restaurant and hotel wheelchair friendliness. Finally, a project is introduced, which relates to wheelchairjimmy.com.

## Target Audience

This case is appropriate for undergraduate students enrolled in a variety of hospitality management courses. In the ADA context, this case study could be utilized in several management courses with a particular focus on Facilities, Guest Services, Human Resources, Restaurant Operations, and Lodging.

## Teaching Objectives & Learning Outcomes

This case study aims to (1) generate classroom discussions about ADA regulations and (2) to discern the differences between wheelchair friendliness versus compliance in the hospitality industry. These teaching objectives will be measured by the following learning outcomes.

Upon completing the assigned readings, classroom discussions, and project associated with this case, students should be able to:

- Analyze the costs related to ADA compliance within a hospitality organization.
- Categorize hospitality establishments as non-compliant, compliant, or friendly in terms of wheelchair accessibility.
- Recommend structural, design, and/or operational modifications of a hospitality establishment for full compliance and/or friendly access of wheelchair guests.

## Theoretical Perspectives

This case is underpinned by two related theoretical perspectives utilized to provide a psycho-social context challenging students' current perceptions of guests in wheelchairs, and the important role innovative hospitality organizations can play in exceeding guests' service expectations. Self-Determination Theory (SDT) is concerned with human motivation as it applies to social development and well-being. The SDT framework provides a perspective for understanding better the importance of intrinsic motivation for those persons with a disability and how practices and structures have the potential to enhance, rather than diminish, mobility.

The past three decades of studies supported by the National Institute on Disability and Rehabilitation Research (NIDRR) has revealed the potential for a new paradigm of disability. The current paradigm of thought on disability is focused on the impairment of the individual, which has implications on a person's capabilities to function in his or her environment. In contrast, the new proposed paradigm of disability by the NIDRR shifts the focus to the interaction between an individual and his or her environment. This shift has implications for both research and practice.

## Lesson Plan

### *Pre-Class Preparation*

This case study may either be used on its own, or as part of a supplemental activity within an ADA-related hospitality module. Prior to instruction, students should have access to the links provided in the "Preparation" section. Students should also be encouraged to conduct some Internet-based research on their own regarding ADA compliance in the hospitality industry.

### *In-Class Presentation*

Depending on the preference and time allotment of the instructor, this case may be presented in one or two class meetings. At the discretion of the instructor, he or she may either assign the case narrative as a reading assignment along with the pre-class preparation work, or present the case as a lecture, guided by the narrative. If presented as a lecture, the instructor should assign the case as a follow-up reading assignment and require students to prepare the discussion questions on an individual basis.

## *Small Group Discussions*

Thirty minutes should be allotted for students to discuss in small groups their individually prepared answers to the case discussion questions. Another 15-20 minutes should be used for group leaders to share their answers with the class, allowing for the instructor to weave in pertinent examples of ADA challenges in the hospitality industry (see ADA lawsuit links provided). The remaining time in the class (at least 20 minutes) should be utilized to discuss the ADA project and grading procedures. If taught in mixed mode, it is recommended to organize the project within a learning management system (i.e. Blackboard, Webcourses, Moodle, etc.), creating content pages and assignment submission portals for each of the four parts of the project.

## *The Project*

It is recommended to present this case study in the early stages of a course, in parallel to a lesson or module on ADA. The student deliverables, particularly Part Three: the 2-3-minute video, are of higher quality if each preceding part of the project (Parts One and Two) is spaced apart and graded individually. Instructor feedback on Parts One and Two helps students to focus on those areas most germane to the course learning objectives.

***Part One: Create a list and categorize ADA-related criteria.*** The purpose of Part One of the project is to ensure that students are well acquainted with the current ADA criteria regarding hospitality organizations. While formal ADA government websites provide specific structural and design criteria, other blogs and disability travel websites also provide context and can demonstrate the difference between compliance and friendliness in terms of meeting and exceeding ADA specifications. Links to wheelchairjimmy.com and wheelchairtravel.org offer in-depth travel information, which includes references to other disability travel blogs: https://wheelchairtravel.org/resources/travel-blogs/. These are rich resources of disability travel information, compared with the more generalized social media sources such as those found on TripAdvisor, Priceline, Expedia, etc.

Students should create a table with at least 10 ADA-based criteria in the hospitality industry, and categorize the criteria in terms of compliance vs. friendliness. For those criteria deemed "compliant", students should make suggestions as to how these could be more user-friendly (see table below as an example). Based on the totality of the 3-part project, Part One could be worth 20% out of a 100-point scale.

***Part Two: Visit and evaluate an establishment.*** Part Two, as a precursor to Part Three, is an essential step in ensuring that students will successfully identify and engage a hospitality establishment to participate in a potential video. A preliminary visit and tour of a hotel or restaurant of the students' choosing will allow both the students and the instructor to determine the viability of the students' choice of venue. In addition, the report required in Part Two will allow students to test the accuracy of their ADA wheelchair compliance checklist from Part One. Part Two of the project could be worth 30% out of a 100-point scale.

***Part Three: Create a 2-3-minute video with a partner, which includes the use of a wheelchair.*** Part Three of the project is best allocated in groups of two. Students may pair up in the class and based on their findings from Part Two of the project, they could determine which venue out of two would be most likely to agree to an informal wheelchair accessibility audit. If the instructor decides to allow students to self-select a venue, a formal written letter on institutional letterhead, accompanied by a brief orientation as to how best to solicit business managers, will adequately prepare students to engage industry managers. If the instructor prefers to assign the venues for the video portion of the project, he or she must organize access to those businesses in advance of the course presentation.

Based on prior use of this case study project, maximum impact as a result of participating in this project is dependent on the use of an actual wheelchair during the filming of the short video. While motorized scooters have become increasingly available, wheelchairs remain the most preferred among disabled users and therefore, contain challenges specific to their use. Many hotels have wheelchairs available for guests. In the absence of these, it is recommended to contact a local wheelchair rental business to loan 2-3 wheelchairs for the duration of the project, or perhaps borrow 2-3 wheelchairs from the institution. Careful solicitation of local partners is key to assuring that future classes will be able to participate in this case study project over the long term.

As a guide to desirable information within the video, students may be directed to the wheelchairjimmy.com website for a multitude of wheelchair travel videos from across the United States, featuring both chain and privately-owned restaurants and hotels. It is recommended that the instructor show a few of these videos during class time, or in the online learning environment. An example of a potential

| ADA Criteria | Facility Type | Compliant/Friendly | Suggestions to Increase Friendliness |
|---|---|---|---|
| Bed height | Hotel | No ADA criteria | Suggested bed height is 20-23" with reference to a 19" wheelchair seat. Suggest 19" for easy transfer from chair to bed. (https://dredf.org/anprm/beds-in-accessible-sleeping-rooms.shtml) |
| Bar stool height | Restaurant | No ADA criteria | Suggest accessible low tables in the bar so chairs can roll up; table height is mandated at 28-32" by ADA. (https://www.katom.com/cat/furniture/dining-room-ada-compliant.html) |

rubric is included in the Appendix and this portion of the project could be worth 40% out of a 100-point scale.

***Part Four: Reflection activity.*** Critical to deep learning in service-related projects of this nature, is the reflection component. Not only do reflections demonstrate students' contextualization of the learning objectives, but they also inform instructors as to which components of the assignment performed best, and which might need re-evaluation. Depending on the nature of the course, the mode (face-to-face, mixed mode, or full online), and the subject area, modifications can be made in subsequent assigned projects to better engage learners. This part of the project could be valued at 10% out of a 100-point scale.

## Analysis of Discussion Questions

*Given the updates to the ADA for hospitality facilities over the years, what are the typical costs for compliance of an exterior entrance ramp, an interior ramp, a swimming pool chair lift, and bathroom modifications? What are the differences in costs between an existing building and new construction?*

Potential responses to this question will vary according to the age, type of operation, location, and design of a hospitality facility. Basic internet searches will reveal the following costs: exterior and interior entrance ramps, approximately US$200-$220 per linear foot or US$4,800 to US$5,280 for a 24 ft long ramp (http://www.adawheelchairramps.com/wheelchair-ramps/ada-guidelines.aspx); swimming pool chair lift, from US$1,200 to US$4,000 per lift (http://www.spinlife.com/category.cfm?categoryID=294); and bathroom modifications, at US$1,500 to US$10,000 (http://www.homeadvisor.com/cost/environmental-safety/remodel-for-disability-accommodation/).

These costs serve only as a rough estimate, where commercial construction costs and building age (retrofit versus new construction) will determine fluctuations in both product and installation costs. While retrofitting costs can pose financial burdens on small businesses, the intention of the ADA statutes is to comply with the standards as is feasible, and over time (https://www.ada.gov/reachingout/lesson33.htm).

*How can a hospitality business operator/firm calculate the return on investment (ROI) of an ADA compliance cost?*

While it is challenging to analyze ROI for ADA compliance costs, students should consider the growing population of travelers who use wheelchairs and assisted walkers in responding to this question. ROI can also be determined according to corporate social responsibility, marketing to the growing population (and their traveling companions) who require wheelchairs and/or motorized scooters and walkers, compliance with the law, and the desire to improve accessibility for all people.

*What are both the tangible and intangible consequences in your region for non-compliance of mandated ADA statutes in the hospitality industry?*

Tangible consequences for non-compliance of the ADA includes potential lawsuits, fines, and federal intervention (http://www.evanterry.com/img.asp?dl=1&t=2&id=24421). Intangible consequences include negative publicity, resulting in the potential loss of revenues from a growing segment of travelers, including retirees and their families (http://www.docsoft.com/Resources/Studies/Whitepapers/ComplianceROI.pdf). Students should discuss a variety of positions on compliance versus non-compliance including frivolous lawsuits, potential closure of small hospitality businesses, and other industry-related challenges.

The instructor is encouraged to utilize the following ADA hospitality lawsuits demonstrating a variety of perspectives on compliance and associated costs:

- Frivolous lawsuits: http://www.abcactionnews.com/longform/crippled-florida-businesses-seek-help-over-serial-americans-with-disabilities-act-suers and https://www.city-journal.org/html/ada-shakedown-racket-12494.html
- Hospitality website access : http://www.hotelmanagement.net/legal/new-lawsuits-raise-concern-over-online-ada-compliance
- Costs associated with "Drive-By" lawsuits: https://www.cbsnews.com/news/60-minutes-americans-with-disabilities-act-lawsuits-anderson-cooper/
- "Twenty Years of ADA Enforcement, Twenty Significant Cases": https://www.eeoc.gov/eeoc/history/45th/ada20/ada_cases.cfm
- Pertaining to pool lifts: https://www.bizjournals.com/phoenix/news/2016/02/04/hotels-bars-restaurants-face-waves-of-ada.html
- ADA compliance for hotel employees: https://simplyaccessible.com/article/internal-systems/

## References


Accessible Society. (n.d.). The 'New Paradigm' of disability. The Center for an Accessible Society [Online]. Retrieved from http://www.accessiblesociety.org/topics/demographics-identity/newparadigm.htm

Deci, E. L. & Ryan, R. M. (1985). Intrinsic Motivation and Self-Determination in Human Behavior. New York: Plenum.

NIH. (2017). Rehabilitative and assistive technology: How many people use assistive devices? NIH Eunice Kennedy Shriver National Institute of Child Health and Human Development [Online]. Retrieved from https://www.nichd.nih.gov/health/topics/rehabtech/conditioninfo/Pages/people.aspx

Resnik, R. (2015). Wheelchair facts, numbers and figures [Infographic]. SmartChair by Kd Healthcare Company USA [Online]. Retrieved from https://kdsmartchair.com/blogs/news/18706123-wheelchair-facts-numbers-and-figures-infographic

Ryan, R. M. & Deci, E. L. (2000). Self-Determination Theory and the facilitation of intrinsic motivation, social development, and well-being. American Psychologist, 55(1), 68-78.

Stansu, H. (2017). Seeking a better deal for disabled travelers. Toronto Star [Online]. Retrieved from https://www.pressreader.com/canada/toronto-star/20170114/283412011392904

Temple University Collaborative. (n.d.). Self-determination. The Temple University Collaborative on Community Inclusion of Individuals with Psychiatric Disabilities [Online]. Retrieved from http://tucollaborative.org/community-inclusion/community-inclusion/self-determination/

***Appendix***

## Sample Grading Rubric for Wheelchair Video

| **Criteria** | **Exemplary**<br>**4 pts** | **Proficient**<br>**3 pts** | **Developing**<br>**2 pts** | **Beginning**<br>**1 pt** |
|---|---|---|---|---|
| ADA Wheelchair Content | Strong message. Covers topic completely and in depth. | Message is clearly communicated. Includes essential information. | Message is vaguely communicated. Includes some essential information with some facts. | Message is unclear. Includes little essential information and one or two facts. |
| Video Organization | Topic is thoroughly and thoughtfully discussed. Well-structured components extending beyond an introduction, a middle and an ending. | Topic is discussed. Structured with an introduction, a middle, and a clear ending. | Topic is discussed with an intact introduction and ending. | Video jumps around without a clear structure. |
| Video Quality | Images or video are well composed and clearly visible. | Images or video are composed and visible. | Images or video are mostly visible. | Images or video are difficult to discern. |
| Audio Quality | Clear delivery enhanced with music or other sound effects. | Clear and consistent. | Mostly clear, with some audio difficult to interpret. | 50% or more of the audio unintelligible. |

# Emirates Airline: The new norm of air travel?

*By Kimberly Mathe, Lauren Finnell and Paige Peterman*

On April 9, 2017, passenger David Dao was forcibly removed from a United Airline's flight, hitting his face, rendering him unconscious, leaving him with a broken nose, missing teeth, and sinus injuries (McLaughlin, 2017). Not two weeks after, an American Airline's employee was accused of hitting a woman with a stroller as she entered a plane sobbing, holding an infant. As a male passenger intervened, during this incident, a fight nearly ensues with the American Airline's employee (Karimi, 2017). The year 2017 has been a year of viral customer service incidents for airlines based in the US, leading way for United Arab Emirates' (UAE) based Emirates Airline to showcase their superior customer service, as they enter new markets worldwide (Brodey, 2017).

In their 30 years of business, Emirates Airline has revolutionized the way the world thinks of air travel. When flying with Emirates one can expect: complimentary airport transfer chauffeurs, large and spacious fleets, inflight Wi-Fi and power outlets, onboard lounge and bar, gourmet dining, pamper kits, optional private suites, refreshing inflight spa and showers, and television with over 2,000 channels. As mentioned, Emirates Airline is entering new markets and seeking new routes worldwide. For example, in March of 2016, Emirates Airline launched the longest non-stop commercial flight in history. The flight departed from Emirates Airline's home base in Dubai, and traveled continuously for sixteen hours to Auckland, New Zealand (Yu, 2016).

With deluxe amenities being offered by Emirates Airline, this begs the question, is this strategy feasible, and even more important, sustainable? Atwal and Williams (2009) suggest that luxury marketing in the travel and tourism industry is particularly difficult due to its intangible nature. For industries like retail, luxury marketing is a more reasonable feat. The Holiday Book at Neiman Marcus, a shopping catalog, has a tangible way of signaling exclusivity and directing attention to a select consumer segment by listing such items as a $1.5 million private jet available for purchase, or a $100,000 set of children's books (Wahba, 2016). But in travel and tourism, one only gets to experience the luxury while in the airport or on board the flight. There is no take home tangibility, only a memorable experience.

Emirates Airline claims it does not want to exclude all passengers and only cater to the most- wealthy. To the average person these aforementioned amenities offered seem exclusive to the wealthy, but in reality, Emirates Airline also caters to multiple classes of travelers including: business, government, religious, military, student, and more. Recently, the company's objective has been to build on their successful business model while leading the industry in delivering better efficiencies and customer outcomes (Emirates Group, 2016). This case examines the development of the company, investigates luxury branding through impression and brand management, and delves into some of the strengths, weaknesses, opportunities, and threats Emirates Airline holds. Through this, the case will meet the following learning objectives: identifying Emirates Airline's strategic position in the international airspace, determine differences in brand management practices between a luxury and low-cost airline, assess the sustainability of a luxury airline, and examine how current events, legislation, and other external forces influence Emirates Airline and the airline industry.

**Kimberly Mathe** *is affiliated with Oklahoma State University.* **Lauren Finnell** *and* **Paige Peterman** *are both affiliated with Tech Tech University.*

## Background and History

Emirates Airline's story began in 1959 when the Dubai government established dnata to provide ground handling services at the new Dubai International Airport (Figure 1). Today, dnata is one of the largest suppliers of combined air services including ground handling, cargo, travel, and flight catering services, and is the largest travel management services company in the United Arab Emirates. It is also a subsidiary of Emirates Airline (dnata, 2017). In 1960, the airport was opened by Sheikh Rashid bin Saeed Al Maktoum who implemented an open skies, open seas, open trade policy, in part to help eliminate the country's dependence on oil resources. More than ever, the "travel and tourism industries are being actively developed as major revenue generators" (Albers, Koch, Lohmann, & Pavlovich, 2009, p. 209). The implementation of this policy was one of the first contributions to building the business-friendly Dubai that we know today.

Discussions then began in 1984 between Sheikh Mohammed bin Rashid Al Maktoum and Maurice Flanagan, director and general manager of dnata, about launching an airline based in Dubai. Later that year a business plan was devised, the name of the airline, Emirates, was chosen, and the decision to build the airline on top of dnata was made. The next year in 1986, due to infrastructure and expansion costs, the young company would post losses for the only time in its history. Nonetheless, the Airbus A310-304 was added to their lineup the next year, designed to Emirates Airline specifications, giving the

*Figure 1*

**Historic Photos of Dubai International Airport**
*(Left- 1965; Center-1971, Right-2000)*

airline the opportunity to further implement their commitment to offering a flying experience superior to their rivals (Emirates, 2017a).

Over the next several years the company continued to expand its portfolio. By 1988, only 38 months in business, the company had route networks to a total of 12 destinations. On its sixth anniversary, the airline was servicing 25,000 passengers per week among 23 destinations. Dubai International Airport saw passenger arrivals hit the 11 million mark in 1999. Emirates Airline's first flight to New York's JFK Airport occurred in 2004 and was marked as the first non-stop passenger flight from the Middle East to North America (Emirates, 2017b). Today, Emirates Airline has been the most valuable airline brand in the world for the past 5 years, with an estimated value of $7.7 billion. Emirates Airline's also operates the world's largest fleet of Airbus A380s and Boeing 777s (Emirates Group, 2016). In 2016, customers recognized Emirates Airline's outstanding service by awarding the airline with the title of "World's Best Airline" at the World Airline Awards (Skytrax, 2017). Emirates Airline strives to continually invest to improve their products and services to ensure that they remain a major, if not the top, contender in the international air travel industry.

## Strategy and Positioning

When managing a brand that offers luxury products and services, companies are aware that it is the status of the product or service that the consumer is purchasing, not the actual product itself. For the airline industry, a low-cost airline and Emirates Airline will both get you to the same destination; however, the status of flying Emirates and the amenities it offers are what makes the product a luxury (Figure 2). Simply put, luxury can be defined as exclusivity or rarity. According to the theory of impression management, research states that consumers are highly affected by the internal drive to create a favorable social image from the outcome of their purchase behavior (Hennigs, Siebels, & Wiedmann, 2007). Some view luxury as useless and superfluous because it focuses on the realm of desires rather than necessities (Mortelmans, 2005). On the other hand, some people crave luxury products solely in spite of them not being vital to life. The idea of having the "best of the best" is what draws consumers to luxury products. So much so, that when marketing your business as a luxury brand, the job is practically done for you. It is human nature to desire the finer things in life.

But is luxury what one seeks in an airline? In a typical customer flight experience there are multiple transaction points one will encounter during their travels (Anderson, Pearo, & Widener, 2008). Prior research has shown that the most important attributes for in-flight service is courtesy of attendants, safety, comfort and cleanness of the seat, and responsiveness of attendants (Tsaur, Chang, & Yen, 2002). Other research suggests that services offered between the flight origin and destination,

*Figure 2*

**Actress Jennifer Aniston in Emirates TV commercial showing luxuries like using a tablet while lying in onboard sleeping suite**

time involved in making the trip, the value of the service, and baggage concerns are of vital importance to customer satisfaction (Gursoy, Chen & Kim, 2005). More research suggests that interactions with flight personnel, the aircraft itself, amount of personal space, food on the flight, and timeliness of the flight are all predictors of customer satisfaction; and that these satisfaction levels vary greatly with certain customer characteristics like age and gender (Anderson et al., 2008). The addition of luxury into each of these aforementioned drivers of customer satisfaction is what Emirates seeks to accomplish, and they have been rewarded through numerous public awards as discussed next.

### Service Awards and Industry Reviews

Emirates Airline continuously and successfully meets the expectations of most travelers according to many industry surveys and reports. A comprehensive survey from 2010 was conducted among frequent flyers of seven major airlines operating longer haul flights out of the UAE (Al-Aali, 2011). These airlines included Air France, British Airways, Emirates, Etihad Airways, Qatar Airways, Swiss Air, and Virgin Atlantic Airways. The purpose of the survey was to measure the level of service quality provided in terms of customer experience from flight booking, all the way through check-in, baggage drop, boarding, plane conditions, in-flight services, to disembarkation and final baggage claim. Results of the survey indicated that Emirates Airline outperformed its rivals in each of these areas (Al-Aali, 2011). Also, as stated previously, Emirates Airline is a four- time winner of the number one airline in service since 2001, and has not fallen out of the top five airlines since 2013 as evaluated by the following categories: ground/airport, onboard: product, and onboard: staff service (Skytrax, 2017; Table 1). From a subjective perspective of luxury, in 2013 when Air-France-KLM CEO Alexandre de Juniac flew Emirates, he took 15 pages of notes of his personal experience when flying to take back to his own airline for improvements (CAPA, 2015). With its long run of awards and accolades, it is inevitable that competitors will be curious as to what Emirates Airline is doing differently, and look for ways that they can implement some of Emirates Airline's strategies into their own business.

***Table 1***

**List of Top 10 Airlines in 2016**

*(Skytrax, 2017)*

| | |
|---|---|
| 1 | Emirates Airline |
| 2 | Qatar Airways |
| 3 | Singapore Airlines |
| 4 | Cathay Pacific |
| 5 | ANA All Nippon Airways |
| 6 | Etihad Airways |
| 7 | Turkish Airlines |
| 8 | EVA Air |
| 9 | Qantas Airways |
| 10 | Lufthansa |

## Overview of Emirates Airlines Strengths, Weaknesses, Opportunities, and Threats

### Fleet

Emirates Airline utilizes multiple business strategies that have proven successful to the company, one of which focuses on their impressive fleet of aircrafts. Specifically, Emirates practices strong environmental commitment by operating one of the world's most eco-efficient fleets and also by their involvement with the Dubai Desert Conservation Reserve. Due to their young age, Emirates Airline's average fleet age is only 6.4 years old as compared to the IATA average of 11.3 years (GoGreen, 2012). Because of this, fuel efficiency and CO2 emissions are lower than the IATA average. But, Emirates has also received some negative attention from competitors who claim Emirates has an unfair advantage over them. Most of this criticism has come from European flag carriers, as they have been the most vulnerable in losing valuable intermediate stop's in one's home country (CAPA, 2015). Until 2003, Emirates initial expansion had gone largely unnoticed until the airline made the largest aircraft order in history for 71 wide body aircrafts. Today, they are the world's biggest operator of wide-bodied jets (Emirates Group, 2016).

Air France has also accused Emirates of ordering too many of Europe's A380s, claiming that "it would seem difficult to meet all of their growth targets" (Table 2; Open Sky, 2009). However, Emirates believes that the A380 best represents the most efficient, environmentally friendly, and productive large aircraft as they begin to grow their fleet and implement their replacement strategies. Yet, the large size of the aircraft does impact their ability to reach certain markets that cannot handle them.

The company also received negative attention when Emirates Airline was able to promote the growth of their company during the world recession. A spokesperson for the airline at the time said, "there was no temptation shown by the company to compromise standards or adopt a 'holding operation' until the world economy recovered" (Safi, 2011). When the airline industry was in a crisis, Emirates Airline was still able to generate a profit of $964 million (Safi, 2011). This is counterintuitive to what typically occurs during a recession; in which large businesses will see sales and profits decline as costs are cut, and hiring is frozen (Davis, n.d.). Major competitors have alleged that Emirates Airline and others have benefited from fuel and infrastructure subsidies (like dnata), lopsided financing and taxation arrangements and operating outside of the boundaries imposed on commercial airlines. Seeing as Emirates Airline is owned by the Dubai government and "operates in a tax free environment with no legacy costs"

*Table 2*

**Airplane (A380) orders placed in 2009 compared to regional population of headquarters (Open Sky, 2009)**

| Airline | Firm A380 (passenger orders) | Regional Population |
|---|---|---|
| Emirates | 58 | 260m (Middle East) |
| Qantas | 20 | 36m (Oceania) |
| Singapore Airlines | 19 | 568m (SE Asia) |
| Lufthansa | 15 | 499m (EU) |
| Air France | 12 | 499m (EU) |
| British Airways | 12 | 499m (EU) |

*m= millions*

(O'Connell, 2011), these allegations are not unwarranted.

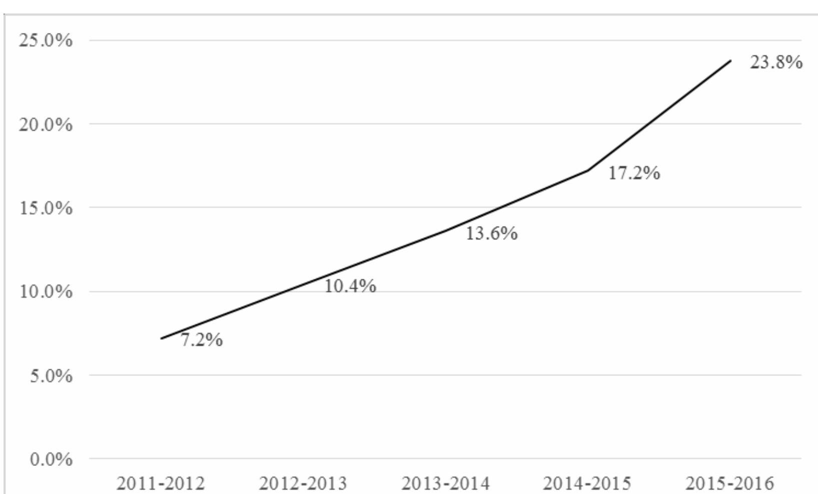
### *Internal and External Stakeholders*

Emirates Airline has seen positive, growth for its return on shareholder investment over the past five years. With positive growth, the company employs a strategy of rewarding its shareholders by offering them special privileges and small discounts. Emirates recorded such a profitable 2016 that they were able to ensure a strong 23.8% return on their shareholder's investment (Emirates Group, 2016; Figure 3). This is a major accomplishment for any business, but shows that Emirates Airline continues to bring in a remarkable profit and growth of the company while focusing on luxury consumer elements.

With such strong returns for its investors, it would be assumed that Emirates Airline would likely be a leader in human resources best practices within the airline industry. The company consists of 84,000 employees from over 160 nationalities (Emirates Group, 2016), but it has been publicly implied that Emirates fails to treat all of their employees fairly which can cause poor public relations in today's highly communicative environment. Most recently, an Emirates flight attendant reportedly was fired after falling down the stairs in the company's signature red high heels (Ward, 2017). According to an opinion article found on www.DontFlyEmirates.com titled, "Failure of recruitment policy in Emirates Airline", some employees of Emirates are "trapped" within the company. It claims employees have great expectations when starting a career with the luxurious airline, but soon after many employees seek out more employee friendly airlines like, Fly Dubai and Qatar Airways. Supposedly these airlines offer higher salaries and better employee benefits than Emirates and when employees join the Emirates Airline workforce they are forced to sign a non-compete contract. Once employees sign this contract they are committed to only employ with Emirates or are forced to quit the airline industry altogether (Truth About Emirates Airlines Management, 2014). The company counters this, claiming to provide a range of excellent benefits to their employees and instills a strong diversity policy, as they believe employees are their biggest asset (Emirates Group, 2017). Other airlines like Southwest Airlines utilize a perceptually more ethical management practice by providing their employees competitive salaries and job security (Condemi, Ferguson, Milliman, & Trickett, 1999). Southwest claims that they are the cheapest airline, yet they continue to rank at the top of the list in customer service among other airlines. Employees at Southwest enjoy working for the company because they have "a sense of family" at work and receive great benefits.

*Figure 3*

**Emirates Return on Shareholder Investment (Emirates Group, 2016)**



### *Customer expectations*

With their competitive positioning as the number one airline in 2016, it is expected Emirates would score exceptionally well in areas such as online booking, transfer services, cabin cleanliness, quality of food, assistance during boarding, staff attitudes, and more (Skytrax, 2017). Subjectively, it is rare to find any extremely low customer reviews when evaluating Emirates. These rare bad reviews all seem to have one thing common, cabin space (Skytrax, 2016b). Reviews on AirlineEquity.com, which is directed through Skytrax, indicate that the cramped seating of the business and economy class do not meet the expectations of consumers. One economy traveler wrote in his review that there was "not much more room than a cheap airline" on his Emirates flight. Travelers perceive Emirates as a luxury airline and expect much more from Emirates than less expensive airlines. The business and economy seats of Emirates Airline are still priced at a luxury value. Consumers who purchase these tickets expect the space and comfort of a luxury aircraft. Nevertheless, the first class cabin has more than enough space to allow for leisure travel. By giving the first class cabin exceptional treatment, Emirates runs the risk of insulting the business and economy travelers. Some consumers argue that if a traveler wants first class treatment, they should purchase a first class ticket. Others may desire that Emirates was more like Southwest Airline, which has only one cabin level and treats all flyers with the same level of respect.

For this reason, branding your business as a luxury company has its drawbacks. A major risk companies impose on themselves when using the luxury strategy, is expectation. If consumers perceive a brand to be luxurious, they will expect luxurious customer service, amenities, and experiences along with the product. The higher the price tag, the higher the expectations, however, Emirates has priced their product not far from its competitors, especially for long-haul flights.

### *External forces*

Changes in the political environment are certain to augment the airline dynamics, in particular for Emirates Airline. For the US, certain travel restrictions have been established by United States President Donald Trump. Specifically, Emirates declared it would cut flights to five US cities because of weakened demand from the travel restrictions (Cornwell, 2017). From the same restrictions, Turkish Airlines and Emirates were placed under a ban that would not allow passengers to have laptops in the cabin, unlike other major US based airlines for fear of bombs (Cornwell & Butler, 2017). To help in gaining ground in the US, Qatar Airways, one of Emirates largest competitors is set to begin purchasing up to 10% of American Airline shares in order to expand its investment in North America (Humphries, 2017). American Airline and other US airlines are lobbying the federal government saying that overseas brands need more regulation; as they say, the foreign airlines are "encroaching on their turf" (O'Reilly, 2015).

## Conclusion and Questions

Even with an embroiled turf battle with US based airlines, Emirates Airline is employing US born actress Jennifer Aniston to help in selling flights. It recently has activated a $20 million advertising campaign to increase demand and showcase its luxury amenities, in particular for traveling families. Emirates Airline's precedence for luxury has transformed air travel from a burden into a tranquil experience. The innovative airline shows no signs of slowing down as it was recently stated that Emirates Airline is considered the fastest growing airline in the world (Shaban, 2015). Emirate Airline has grown so exponentially that the company has announced plans to invest $32 billion in a second Dubai airport to meet the rapid growth of the airline. The second airport will be called Al Maktoum International at Dubai World Central (Jones, 2014). Emirates Airlines president, Tim Clark, has stated the airline will soon be the largest airline on the planet in terms of international passenger traffic. The airline is expected to have more than 250 aircraft serving 70 million passengers across six continents by 2020 (Sambidge, 2013). However, until recently, the travel restrictions put forth by the US may change the growth rate at which these plans are set to happen.

With all of these strengths and weaknesses considered combined with the forces outside of their control given the political environment Emirates competes in, what should Emirates focus on next? Currently, Emirates Airlines aims to connect travelers around the world with luxurious non-stop flights. The airlines rapid growth and success is proof that the company's luxurious approach to air travel has been well received, but external changes and certain weaknesses as discussed may knock the company from its top spot as number one airlines. Emirates Airlines changed the way passengers saw air travel, but what can it do next to maintain its position as the world's number one airline?

### *In-Class Discussion Questions*

- How have the recent airline service failure incidents with United and American helped or hurt the airline industry as a whole? How has Emirates faired? (Learning objectives 1,4)
- What amenities are most important to you in airline travel? How much would you be willing to pay to ensure you receive these amenities? (Learning objectives 2,3)
- What are some current events you have heard of recently that could affect Emirates Airline's business strategy? (Learning objectives 1, 2, 3 4)

# teaching note

*Emirates Airline: The new norm of air travel?*

## *Summary of the Case*

With the recent incidents that have occurred in the airline industry, service and customer focus is becoming a more scrutinized topic in the world of air travel. This case study gives readers an insight into luxurious skies through the evaluation of Emirates Airline, which is headquartered out of and in part owned by the government based in Dubai, UAE. Using theoretical underpinnings in brand management, and impression management, this case showcases Emirates Airline's strategic positioning and presents some of the competitive advantages, and disadvantages, the airline has over their competitors. The goal of this case study is to educate readers on this unique travel industry niche in which Emirate Airline is a part of, and why the Emirates standard could soon be the new norm of air travel.

## *Learning Objectives*

This case presents a history and details of the luxury airline, Emirates Airline. After reading and discussing this case study, students should be able to:

- Explain Emirates Airline's competitive position within the international airspace.
- Determine differences in brand management practices between a luxury airline brand like Emirates Airline and a low-cost airline.
- Analyze the sustainability of a luxury business strategy in the airline industry.
- Examine how current events, legislation, public relations incidents, and other external forces can influence an airline and shape future business decisions.

## *Target Audience*

The intended audience of this case study is undergraduate students pursuing a hospitality or business management focused degree, in particular for an upper-level strategic management or capstone course. In addition, this case study could be relevant to the curriculum of a travel and/or tourism based course within a hospitality or business management degree plan.

## Lesson Plan

The lesson structure is conducted in three phases. The first phase is an inquiry phase before the case is distributed. Its primary intent is to provide students with familiarity into the airline industry, major competitive players, current events, and best practices in the industry. This can be done as an in-class activity or out-of-class assignment depending on the instructor's classroom management techniques and practices. The second phase deals with an in-class examination of the case complete with its own set of discussion questions and instructor resources to increase class interaction. Finally phase three can be one or two assignments with a SWOT analysis project or a written assignment (see actual student responses included).

### *Phase 1*

As an in-class or out of class assignment pre-case inquiry, have students find the following information (may be done in small groups of 2-3 depending on class size):

- External forces:
  - Information regarding current legislation in air travel domestically and internationally.
- Marketing/Public Relations
  - News stories, press releases, and other information in which airlines have had a service failure. How were they rectified, was it satisfactory?
- Human Resources
  - Which companies have the best human resource practices? Cite examples of each.
- Sustainability/Environmental Affairs
  - Environmental impact of airlines. Which aircrafts are the most impactful? Compare fleets from: Emirates v. Qatar v. American
- Financial/Pricing
  - Browse ticket prices to and from various destinations (use destinations closest to you) at different classes to get an idea of their pricing and how levels of tickets compare.

Allow 10-15 minute informal presentation of answers found. Or may be turned in as a written assignment.

### *Phase 2*

The case study should then be introduced before class so that students have ample time to read before attending the next class period. The discussion questions at the end of the case should be discussed in a large group format.

Instructors are advised to use some of the following resources to demonstrate in class:

CNBC video about the airline industry profits:

- https://www.cnbc.com/video/2017/08/30/a-very-good-year-so-far-for-the-airline-industry-executive.html
- MSNBC video about public relations incidents
- http://www.msnbc.com/for-the-record-with-greta/watch/what-s-wrong-with-the-airline-industry-928578115635

Instructor may show the following videos about Emirates flight experience:

- Cabin Tour: https://www.youtube.com/watch?v=tx0gMidbJvI
- A380 First Class: https://www.youtube.com/watch?v=tJijj-qMx4U
- Conversely, this video provides a tour of the plane United Airlines uses:
- United Airlines 777 inside airplane: https://www.youtube.com/watch?v=MgyQQm4w-zA

After, the instructor may inquire with students regarding relevant facts from the case and then engage in the discussion questions provided at the end of the case. The instructor may then choose to assign the SWOT analysis for presentation or the potential writing assignment

## *Phase 3 option 1- SWOT analysis*

Have the students split into groups of 4 or 5 and conduct a SWOT analysis and prepare a 10-15 presentation. While they are provided some of the strengths, weaknesses, opportunities, and threats, they will need to conduct a thorough analysis and then decide on the next steps that the company will take considering all of the inputs for the business and create a short term business strategy. Key issues to focus on:

- Government
  - UAE has an ownership in Emirates Airline
  - US travel restrictions
- Human resource practices
  - Ethical leadership/ethics
- Pricing/Accounting
- Environmental issues/Green practices
- Marketing
  - Public relations
  - Brand management
    - Socioeconomics
    - Luxury

## *Phase 3 option 2- Potential Writing Assignment with Actual Student Sample Response*

Possible answers to the case study discussion topics and questions are discussed in this section of the teaching note. Instructors may pick as many questions as desired for assignment, but suggest at least three.

1. *Do you think that branding the company as a luxury is sustainable? Why or why not? (Learning objective 3)*

   The dictionary definition of luxury is "the state of great comfort and extravagant living". Emirates offers gratifying comfort in an industry that is not normally associated with comfort. According to Inc.com there are ten primary reasons consumers are willing to pay more when making a purchasing decision.

   Emirates exhibits several of the items on the list, for example "the product arrives more quickly" (James, 2013). Emirates offers the longest non-stop flight in the world. This is appealing to consumers who need to get to a destination quickly and/or consumers who do not enjoy the hassle of layover's and plane changes. Another item on the list suggests that consumers are willing to pay more for luxury for the reputation associated with the brand. Consumers are willing to pay more "to feel and look wealthy" (James, 2013).

   The article also states that consumers are willing to pay more for friendly customer service. One of the major components to Emirates Airlines is their superb customer service. Consumers are willing to pay more when they know that if a problem occurs "it will be handled quickly and cheerfully" (James, 2013). And last but not least, consumers are willing to pay more for comfort and a stress-free experience. The price difference between common airlines and Emirates is worth the absence of hassle. For most people, traveling is stressful and uncomfortable. A majority of Emirates Airlines passengers are traveling for pleasure, perhaps for a glamorous get away in Dubai. Emirates target market is typically more concerned with comfort than financials. "People don't worry about the cost of salt when they have a big fish to fry" (James, 2013). Branding Emirates as a luxurious company is sustainable because consumers are willing to pay more for efficiency, reputation, and comfort.

   Counter argument: Branding Emirates Airlines as a luxury brand is not sustainable because of the fluctuating economy. Luxury items may always be sought after but not necessarily purchased. For example, the largest luxury conglomerate in the world, LVMH, reported the slowest growth it has seen since 2009 in the fourth quarter of 2015 (Vesilind, 2016). Financial experts believe the economic slowdown in China is to blame for LVMH's sagging sales (Vesilind, 2016). The Chinese market crash has affected consumers and retailers around the world. Consumers are more likely to purchase tangible items over services and experiences during a global crisis. This puts Emirates Airlines at risk during economic downturns. The majority would not consider the experience Emirates offers to be a necessity. Branding a company as luxury is not sustainable in a fickle economy.

2. *Using the definitions of luxury provided in the case, explain if you believe impression management is a customer driven concept tor brand driven concept. (Learning objective 2)*

   Recently, viral pictures of airline travel from the 1950s emerged (see photo below) and this question made me think that it is more the brand that is driving this concept. Airline travel is not new, but its accessibility has been expanded. What used to be a concept only for the elite, the rich, and the famous, is now something most everyone can purchase. So Emirates saw the glamorous days of travel past and more luxurious accommodations and wanted to provide something that was desired, that not everyone could have when they traveled. By doing this, the rarity, value, and difficulty to imitate is created (because airplanes would have to refashioned for their spacious luxurious sleeping pods). But even if a customer doesn't travel in the highest ticket price class, they are still receiving levels of customer service that Emirates Airline claims is hard to find elsewhere. In other words, I don't think that customers were asking for it, but when it was provided, those who saw the opportunity to create luxury took advantage of it. So the company was the driving force.

3. *Was it unethical for Emirates to not compromise standards and airfare during the recession? Why or why not? (Learning objectives 3, 4)*

   Emirates Airline is a company that caters to the wealthy. The company has no ethical responsibility to adjust its business model during an economic recession. The airline is known for world- class service and amenities. The company would lose the reputation of being the most luxurious airline in the world if they changed their high standards for service. The glamorous airline gives back with the Emirates Airline Foundation. The foundation provides food, medicine, education and housing to children in need all around the world (emiratesairlinefoundation.org). The company has an ethical responsibility to charity, however the company is not responsible for making a luxury experience cheaper for first class travelers. If I were in charge, I would uphold the values of Emirates by maintaining the high standards and expectations of the airline. I would continue to support charities and foundations but I would not compromise the quality experience of Emirates. Emirates Airlines has positioned themselves as the holy grail of all airlines. It would not make sense to change the business model of a successful company in such a competitive industry. The company is not ethically responsible to change the core element of the business model during economic recessions.

   Counter argument: Emirates Airline should adjust their standards and prices during an economic recession. The company should make these adjustments as an ethical responsibility to their passengers.

   Emirates has a responsibility to consumers and should make adjustments when possible to allow consumers to enjoy their services. The airline should focus more on basic travel than high-class service during economic crisis. It would be oblivious for the company to focus on extraneous services and reputation during an economic crisis. It is typical for companies to cut back on expenses when sales and revenues decline due to economic recession (Davis, n.d.). If I were in charge I would set the glamorous amenities and services aside and primarily focus on getting passengers from A to B. I would adjust the business model to align with common airlines such as, American Airlines. This would help the business financially while being faithful to consumers by providing discounted travel. Emirates owes it to their customers to adjust standards during times of need.

4. *Is it unethical to treat passengers differently based on their ticket price and status? How could you prevent such encounters that reference jealousy and dissatisfaction in the economy class? (Learning objectives 2, 4)*

   It is not unethical to treat passengers differently based on their ticket status because consumers willingly know the type of service they are warranted based on the cast system in airlines. Consumers would not pay more for first class tickets if they were treated the same way as coach passengers. The first class section of an airplane is designated to passengers who are willing to pay more for more space, comfort, and high-class service. In many cases, a business class ticket can cost more than ten times the price of a coach ticket (Hill, n.d.). The economy section of an airplane is for the more practical traveler. The ticket status on airplanes gives consumers options. It is not unethical to treat passengers differently based on a choice they made. First class passengers paying ten times more than coach passengers should receive more attention and services. The whole reason consumers pay more for first class tickets is to receive higher quality service, entertainment and comfort. The best way to prevent dissatisfaction in the economy class section is to offer those passengers a higher level of service than they would receive in the economy section on a competing airline. It is impossible to completely eliminate jealously among passengers as it is a natural response. However, a way to prevent jealousy could be to keep the first class section curtained off from the economy class. This would prevent economy passengers from seeing the exact treatment the first class passengers receive. This would also create a VIP sensation for the passengers would paid extra for their first class ticket. Excellent customer service throughout the airplane is the best way to avoid dissatisfied passengers. It is important to remember that Emirates Airline is not an American company. Many Americans believe in social equality conversely the culture in the United Arab Emirates is much different than it is here in the States.

   Counter argument: It is unethical to treat passengers differently based on their ticket price and status. It is not right to offer special treatment to certain passengers just because they can afford more than other passengers. Every passenger should be treated equally and fairly. Why should airlines be able to choose who and who is not privileged? To prevent jealously and dissatisfaction Emirates could change their fleets to a "one-class" only model. Southwest Airlines uses this method, their planes are made up of one large section with no seat assignments. Once "onboard a Southwest plane everyone on the plane is equal" (Roth, 2015).

5. *What are the company's core competencies or sources of competitive advantage?(Learning objectives 1,2)*

   Some of the competitive advantages of Emirates Airline include:

   - Frequency of long haul flights
   - Effective pricing strategy
   - Young age compared to competitors
   - Environmental responsibility
   - Ownership by United Arab Emirates government

   These are just a few of the competitive advantages of Emirates Airline, but they show how the airline has been able to rise above their competitors in the relatively short time they have been in operation. The frequency of long haul flights and their pricing strategy gives Emirates the ability to relatively cheap tickets at a lower cost and therefore translates to profitability for the company. Their young age means they don't pay legacy fees to their employees, and their aircraft are younger resulting in reduced costs for maintenance. The age of the aircraft also adds to their environmental responsibilities efforts, and they also participate in several environmental programs. The United Arab Emirates government monitors operations of the airline and ensures they comply with standards and remain competitive. Students should demonstrate an understanding of why these advantages have proven successful to the company.

6. *Do you believe United Arab Emirates ownership in Emirates Airline affects some of the restrictions being placed on Emirates Airline (example: the laptop ban)? Do you think the company would be more or less successful moving forward if it was privately owned or publicly traded?(Learning objective 4)*

   The case mentioned that Qatar airlines is seeking to buy a 10% stake in American Airlines and that the Gulf airline carriers are seeking to expand their routes in the US to gain market share. The US based big three airlines are pushing back with American Airlines CEO stating that American Airlines is "competing against countries, not airlines" (Benning, 2017). With statements like this it does appear that maybe the travel legislation put forth did have benefits to US based businesses, with the consequential effects of hurting internationally located businesses. With the current travel restrictions, the Qatar purchase seems unlikely and its feasibility lacking. It would appear the travel restrictions put forth by the US would hurt the Gulf carriers as many of these passengers would either a) no longer be willing to leave the country for fear of not being able to return or b) lack of entry into the country due to travel visas. Emirates is certainly in a unique position with their government backing and the US airlines being publicly traded companies owned by shareholders. I do not think that if Emirates had a different ownership structure the restrictions would change, I think all Gulf based airlines would be encountering the same restrictions, regardless of ownership.

7. *How would you expand the company? Can growing at such a rapid pace hurt the company in the future?(Learning objective 1)*

   For this question, students will give their opinion on how they would expand Emirates Airlines. They should have a basic understanding of business practices and strategies. They should take a look at financial statements and determine if certain expansion ventures are feasible or not. Students should give 3- 4 ways in which they would expand the business, such as acquisition of smaller airlines, technological developments, expansion to more cities, etc. Note: The second part of this question is strictly opinion. Whether the student says rapid expansion of the company will have a negative or positive impact in the future, they should provide 3-4 reasons to back up their opinion.

## Additional Readings to provide graduate students


Fan, T., Vigeant-Langlois, L., Geissler, C., Bosler, B., & Wilmking, J. (2001). Evolution of global airline strategic alliance and consolidation in the twenty-first century. Journal of Air Travel Management, 7(6), 349-360.

Grimme, W. (2011). The growth of Arabian airlines from a German perspective – A study of the impacts of new air services to Asia. Journal of Air Travel Management, 17(6), 333-338.

Vespermann, J., Wald, A. & Gleich, R. (2008). Aviation growth in the Middle East – impacts on incumbent players and potential strategic reactions. Journal of Transport Geography, 16(6), 388-394.


## References


Al-Aali, S. N. A. (2011). The exceptional performance strategies of Emirates Airline. Competitiveness Review: An International Business Journal, 21(5), 471-486.

Albers, S., Koch, B., Lohmann, G., & Pavlovich, K. (2009). From hub to tourist destination – An Explorative study of Singapore and Dubai's aviation-based transformation. Journal of Air Transport Management, 15(5), 205-211.

Anderson, S., Pearo, L. K., & Widener, S. K. (2008). Drivers of service satisfaction: linking customer satisfaction to the service concept and customer characteristics. Journal of Service Research, 10(4), 365-381.

Atwal, G., & Williams, A. (2009). Luxury brand marketing – The experience is everything! Brand Management, 16(5/6), 338-346.

Benning, T. (20170. American CEO says airline hasn't seen any 'discernable impact' from Trump's travel ban. https://www.dallasnews.com/news/politics/2017/03/02/american-ceo-says-airline-seen-discernible-impact-trumps-travel-ban [Accessed the 25th of September, 2017].

Brodey, S. (2017). The not-so-friendly skies: Why America's big airlines- and Minnesota's representatives in Congress-are crying foul at their Gulf-based competitors. https://www.minnpost.com/politics-policy/2017/09/not-so-friendly-skies-why-america-s-big-airlines-and-minnesota-s-representat. [Accessed the 25th of September, 2017].

CAPA (2015). Emirates Airline turns 30: Just as it has changed the world, now

Emirates faces its own changes. Retrieved from http://centreforaviation.com/analysis/emirates-airline-turns-30-just-as-it-has- changed-the-world-now-emirates-faces-its-own-changes-245140.

Condemi, B., Ferguson, J., Milliman, J., Trickett, D. (1999). Spirit and community at Southwest Airlines: An Investigation of a spiritual values-based model. Journal of Organizational Change Management,12(3), 221-233.

Cornwell, A. (2017). Emirates reduces flights on fives US routes as restrictions hit demand. https://www.reuters.com/article/us-qatarairways-american-airline-stake- idUSKBN19R1DV. [Accessed the 25th of September, 2017].

Cornwell, A., & Butler, D. (2017). Emirates, Turkish Airlines say laptop ban lifted on US flights. http://in.reuters.com/article/usa-airlines-emirates-idINKBN-19Q0JA. [Accessed the 25th of September, 2017].

Davis, M. (n.d.) The Impact of recession on business. Investopedia. from http://www.investopedia.com/articles/economics/08/recession-affecting-business.asp. [Accessed the 25th of September, 2017].

Dnata (2017). About dnata. Retrieved on April 6, 2017 from http://www.dnata.com/english/about- dnata/overview/.

Emirates (2017a). History. Retrieved on April 8, 2017 from http://www.emirates.com/us/english/about/history.aspx.

Emirates (2017b). Emirates to increase its services to JFK. https://www.emirates.com/media-centre/emirates-to-increase-its-services-to-new-york-jfk. [Accessed the 25th of September, 2017].

Emirates Group (2017). Emirates group careers. http://www.emiratesgroup-careers.com/english/about/companies/default.aspx. [Accessed the 25th of September, 2017].

Emirates Group (2016). Annual reports. Retrieved on April 8, 2017 from http://www.emirates.com/english/about/annual-reports.aspx.

Gursoy, D., Chen, M. H., & Kim, H. J. (2005). The US airlines relative positioning based on attributes of service quality. Tourism Management, 26(1), 57-67.

GoGreen (2012). Emirates fleet continues to lead airline industry in fuel efficiency. http://www.go-green.ae/greenstory_view.php?storyid=2069. [Accessed the 25th of September, 2017].

Hennigs, N., Siebels, A., Wiedmann, K-P. (2007). Measuring Consumers' Luxury Value Perception: A Cross-Cultural Framework. Academy of Marketing Science Review 7, 1-21.

Hill, D. (n.d.). Business vs. Economy Class. USA Today. http://traveltips.usatoday.com/business-vs-economy-class-103443.html. [Accessed the 25th of September, 2017].

Historic Photos of Dubai National Airport. (2012). Retrieved on April 4, 2017 from http://www.rediff.com/money/slide-show/slide-show-1-historic-photos-of-dubai-international-airport/20120621.htm#25.

Humphries, C. (2017). Qatar Airways set to start buying shares in American Airlines. https://www.reuters.com/article/us-qatarairways-american-airline-stake-idUSKBN19R1DV. [Accessed the 25th of September, 2017].

James, G. (2013). 10 reasons customers will pay more. http://www.inc.com/geoffrey-james/the-10-reasons-customers-pay-more.html. [Accessed the 25th of September, 2017].

Jones, R. (2014). Dubai to Invest $32 Billion in Airport to Meet Emirates Airline Growth. Wall Street Journal. https://www.wsj.com/articles/dubai-to-invest-32-billion-in-airport-to-meet-emirates-airline-growth-1410199442. [Accessed the 25th of September, 2017].

Karimi, F. (2017). American Airlines investigates after video shows mom in tears. Retrieved on September 25th, 2017 from http://www.cnn.com/2017/04/22/us/american-airlines-video-confrontation-trnd/index.html.

Media Centre (n.d.). The Emirates Group. Retrieved from https://www.emirates.com/media-centre/emirates-sees-brand-value-grow-for-4th-consecutive-year-to-us66- billion-images-to-follow-to-go-out-at-1330#

McLaughlin, E. (2017). Man dragged off United flight has concussion, will file suit, lawyer says. http://www.cnn.com/2017/04/13/travel/united-passenger-pulled-off-flight-lawsuit-family-attorney-speak/index.html. [Accessed the 25th of September, 2017].

Mortelmans, D. (2005) Sign values in processes of distinction: The concept of luxury. Semiotica,157 (1-4), 497-520.

O'Connell, J. F. (2011). The rise of the Arabian Gulf carriers: An insight into the business model of Emirates Airline. Journal of Air Transport Management, 17(6), 339-346.

O'Reilly, L. (2015). Emirates airlines is betting $20 million on Jennifer Aniston to help sell more flights. http://www.businessinsider.com/emirates-launches-20-million- campaign-starring-jennifer-aniston-2015-10. [Accessed the 25th of September, 2017].

Open Sky. (2009). The Public Affairs Journal of Emirates. http://content.emirates.com/downloads/ek/pdfs/open_sky/Feb2009.pdf. [Accessed the 25th of September, 2017].

Roth, C. (2015). Does Southwest have business class or first class? https://coreyluvstravel.com/2015/09/18/does-southwest-have-business-class-or-first-class/ [Accessed the 25th of September, 2017].

Safi, A. (2011). A Case Study of Analysis of Luxury Airlines Emirates Airways and Competitors, University of Trento-Italy Faculty of Economics, 1-34.

Sambidge, A. (2013). Emirates sets out plan to fly 70m passengers in 2020. Arabian Business. http://www.arabianbusiness.com/emirates-sets-out-plan-fly-70m-passengers-in-2020- 524115.html. [Accessed the 25th of September, 2017].

Shaban, S. (2015). Emirates is the fastest growing airline in the world. Retrieved on April 7 from http://www.khaleejtimes.com/business/aviation/emirates-is-the-fastest-growing-airline-in-the-world

Skytrax (2016b). Emirates seat reviews. Retrieved on April, 4 2017 from http://www.airlinequality.com/seat-reviews/emirates/page/3/

Skytrax (2017). Airline of the year winners. http://www.worldairlineawards.com/Awards/world_airline_rating_2016.html. [Accessed the 25th of September, 2017].

Truth About Emirates Airlines Management (2014). Failure of recruitment policy in Emirates Airline. https://donotflyemirates.wordpress.com/2014/11/26/failure-of- recruitment-policy-in-emirates-airline/. [Accessed the 25th of September, 2017].

Tsaur, S. H., Chang, T. Y., & Yen, C. H. (2002). The evaluation of airline service quality by fuzzy MCDM. Tourism Management, 23(2), 107-115.

Vesilind, E. (2016). How the modern consumer is changing the meaning of luxury. Retrieved on June 30 from http://www.jckonline.com/2016/05/06/how-21st-century-consumer-defines-luxury.

Wahba, P. (2016). Neiman Marcus' Christmas Book gifts are as outlandish as ever. Retrieved on July 7 from fortune.com/2016/10/19/neiman-marcus-christmas-book-gifts-2016/.

Yu, E. (2016, March 3). Emirates completes longest nonstop flight. CNN. http://www.cnn.com/2016/03/03/aviation/emirates-longest-flight-dubai-new-zealand. [Accessed the 25th of September, 2017].

# The Northern Likes: The case of Northwest Territories' social media campaign

By Michael W. Lever and Statia Elliot

## Introduction: Building an Awareness Campaign

With a population of just 42,810, made up of 11 languages, and spread over 1,170,000 square kilometers of mostly undisturbed terrain (Tourism Fact Sheet, 2016), The Northwest Territories (NWT) is positioned to attract visitors seeking vibrant, authentic cultures amidst awe-inspiring land (Five Year Marketing Strategy, 2016). NWT is a destination with spectacular nature and adventure product, notably Aurora viewing. But like many northern and remote destinations, it is challenged by low awareness on the demand side, and capacity issues on the supply side. Geographically, NWT is 1,000 kilometers from its main markets, consequently perceptions of its product offerings can be vague, and travel costs high. Further challenging NWT Tourism is its limited budget in comparison to many of its competitor destinations. However, what NWT Tourism does have is a creative marketing team!

The Executive Director of NWT Tourism, Cathie Bolstad, knows full well that the dilemma they face is in regard to awareness – if only people knew about what the region had to offer, they would be much more inclined to visit. This sentiment is confirmed by Jillian Barber of Environics, the market research firm working with the NWT Tourism team, who discovered through surveying Canadian travelers in early 2017 that 33% of them are not interested in visiting the region because they are not familiar with what there is to see and do. This obstacle inspired the creation of a campaign designed to build awareness – share the lesser known places and activities (referred to as the Secrets) of the north with those who were previously unfamiliar with the NWT through a multi-media marketing campaign. The resulting campaign spans Canada (excluding Quebec and NWT) and features the distribution of folders containing a limited number of "gold tickets", along with a strong online presence to offer entrants a chance to win a free trip to the NWT.

In designing the multi-media million dollar campaign, NWT Tourism promoted the Secrets via consumer shows, select restaurants, print advertising, vehicle and transit decals, but placed primary emphasis on digital technology and content marketing to build destination awareness. Acknowledged in their Five Year Marketing Strategy (2016, p.16), "technology and social media are transforming the travel industry" and a better understanding of how social media users interact with their brand is now essential. Thus, the Secrets campaign is not only intended to increase awareness, but also to advance market analytics and responsiveness capabilities Results-to-date confirm it is the social media component in which contest participants are most engaged by claiming more winning tickets than any other promotional activity.

**Michael W. Lever** *and* **Statia Elliot** *are both affiliated with University of Guelph.*

Social media, enabling users to share content via applications such as Facebook, has become the modus operandi of destination marketers in the 21st century, employed to increase visibility, differentiate destinations, and generate electronic word-of-mouth, all to influence traveller behaviour (Lange-Faria & Elliot, 2012). The influence can be explained in part by the theory of social presence, whereby the higher the degree of social presence, the greater social influence communicators have on another's behaviour (Kaplan & Haenlein, 2010). Tourism destination branding research supports an image-to-behaviour effect, and in practise, much of destination marketing is image based. A destination brand is any "name, symbol, logo, word mark or other graphic that both identifies and differentiates the destination" (Blain, Levy, & Ritchie, 2005, p. 329). This notion of brand is further enhanced through a better understanding of the beliefs and perceptions of a place held by potential travelers, which forms a tourist's destination image (TDI) (Baloglu & McCleary, 1999). A strong TDI can contribute to a greater awareness of a destination. The NWT social media features images of place, and research suggests that TDI ultimately influences destination selection (Elliot & Papadopoulos, 2016). If effective, NWT's use of social media should strengthen their product awareness and destination choice.

The purpose of this case is to assess the mid-point results of the social media campaign against the backdrop of NWT Tourism's objectives, as well as overall market factors, to uncover insights into not only how it has performed so far, but what it may accomplish by its completion. These insights can be gained by analyzing:

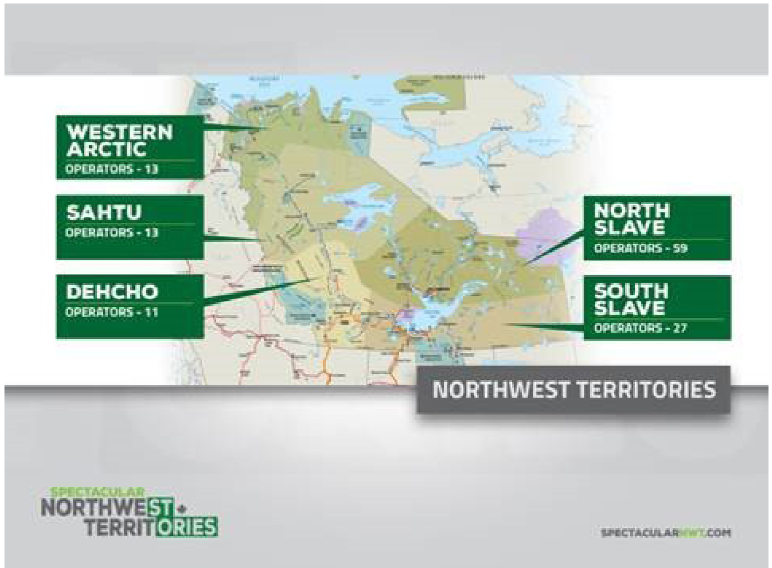
- The attention paid to product in Yellowknife and beyond in the NWT Facebook campaign;
- Which of NWT's product offerings are generating interest, and which are not; and,
- The overall effectiveness of the social media campaign to build awareness of the NWT brand.

## Spectacular Northwest Territories!

NWT Tourism is a non-profit organization funded by the Government of the NWT to market their destination. Their overall goals are threefold: (i) to increase destination awareness; (ii) to promote all tour-

*Figure 1*

**Number of NWT Tourism Operators by Region**




ism sectors; and (iii) to drive traffic to all five regions of NWT. Referring to the map below, the North Slave Region located closest to the capital city of Yellowknife, has a much broader base of tourism operators who are market and trade ready than the other regions.

While NWT Tourism's marketing must aim to best match potential visitors to tourism products and experiences, NWT Tourism has to avoid a Yellowknife centric focus, balancing consumer demand with political requirements to market the whole territory. "NWT Tourism is proposing a marketing strategy that... will grow the tourism industry, provide economic benefits to all regions of the NWT, and be sustainable for the next five years" (Five Year Marketing Strategy, 2016, p.17). Specifically, NWT Tourism's strategic objectives are to (Five Year Marketing Strategy, 2016, p.42):

- Increase the visitor spend to $235 million by 2020
- Strengthen and uphold the Spectacular NWT Brand
- Lead with our best
- Strengthen our partnerships to enhance marketing efforts
- Make digital marketing the centerpiece of all marketing programs
- Strengthen how research and results drive our decision making

Considering market segmentation, the NWT's Canadian psychographic targets are the Gentle Explorer, Free Spirits, Authentic Experiencers, and Personal History Explorers as categorized and defined by the Canadian Tourism Commission (2008). They aim for the 45+ age, long haul traveler with disposable income over $150,000/year. By origin, 57% of leisure visitors to the NWT are Canadian, primarily coming to tour or visit friends and family. Asian visitors (Japan, China, and South Korea) make up the second largest group at 28%, mainly drawn to Aurora viewing. Visitors from the USA, once the mainstay of fishing and hunting, are a distant third at only 8%.

Since the leisure traveler makes up 57% of the total visitors to the NWT (Five Year Marketing Strategy, 2016, p.20), the importance of understanding what draws them to the region is crucial. The six main purposes of leisure travel are identified as: Aurora viewing, fishing, general touring, hunting, outdoor adventure, and visiting friends and relatives. As seen in Table 1, NWT tourism grew 11% in 2015/16 over the previous year, going from 84,810 visitors to 93,910 visitors. Visitor spending rose 14% from $146.6 million to $167 million. Interestingly, growth has not been even across activities, and spending patterns vary significantly.

In sum, traditional high-yield experiences such as fishing and hunting are not growing, outdoor adventure has potential but low awareness, and Aurora viewing is significant but facing increased competition from neighboring Yukon and other destinations.

## 150 Secrets of the North Campaign

Beginning on January 1, 2017, the social media pages of NWT Tourism have posted one Secret a day about the territory, depicting a high quality visual and an appealing description of an experience in which one can engage in should they visit. Just past the mid-point of the campaign, with 80 Secrets revealed on the NWT Facebook page, Cathie wants to know if the campaign is working. The pins on the map (legend in Figure 2) represent the location of the Secrets posted to date, intended to promote all regions of the NWT.

With five regions to promote and six tourism actitivy categories, the NWT Secrets campaign has a lot to cover. This leads to the question

*Table 1*

## Northwest Territories Visitation Statistics (Sep. 2016)

**Northwest Territories Visitation Statistics**

| Main Purpose of Travel | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | % Change |
|---|---|---|---|---|---|---|
| Aurora Viewing | 7,400 | 15,700 | 21,700 | 16,400 | 24,300 | 48% |
| Fishing[a] | 5,100 | 4,800 | 5,600 | 4,300 | 4,600 | 8% |
| General Touring | 13,400 | 15,200 | 14,800 | 14,900 | 19,000 | 28% |
| Hunting | 480 | 500 | 510 | 510 | 510 | 1% |
| Outdoor Adventure | 2,300 | 3,100 | 1,900 | 2,100 | 2,400 | 13% |
| Visiting Friends & Relatives | 11,800 | 13,800 | 14,100 | 17,200 | 12,200 | -29% |
| Total Leisure Visitors | 40,480 | 53,100 | 58,610 | 55,410 | 63,010 | 14% |
| Business Travel | 24,300 | 24,100 | 35,300 | 29,400 | 30,900 | 5% |
| Total Visitors | **64,780** | **77,200** | **93,910** | **84,810** | **93,910** | 11% |

**Northwest Territories Visitor Spending (millions)**

| Main Purpose of Travel | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | % Change |
|---|---|---|---|---|---|---|
| Aurora Viewing | $ 10.2 | $ 15.2 | $ 21.0 | $ 26.8 | $ 39.7 | 48% |
| Fishing[a] | $ 12.9 | $ 11.6 | $ 14.0 | $ 9.3 | $ 9.7 | 4% |
| General Touring | $ 10.9 | $ 12.6 | $ 12.6 | $ 14.0 | $ 19.8 | 41% |
| Hunting | $ 5.5 | $ 5.8 | $ 5.9 | $ 7.1 | $ 7.2 | 1% |
| Outdoor Adventure | $ 5.2 | $ 6.0 | $ 4.1 | $ 6.0 | $ 7.0 | 17% |
| Visiting Friends & Relatives | $ 7.2 | $ 8.4 | $ 8.9 | $ 12.0 | $ 8.5 | -29% |
| Total Leisure Visitors | $ 51.9 | $ 59.6 | $ 66.5 | $ 75.2 | $ 91.9 | 22% |
| Business Travel | $ 48.5 | $ 48.1 | $ 70.5 | $ 71.4 | $ 75.2 | 5% |
| Total Spending (millions) | **$ 100.4** | **$ 107.7** | **$ 137.0** | **$ 146.6** | **$ 167.1** | 14% |

Last Update: September 26, 2016. "

a: Methodology and historical data revised in 2016

of whether NWT Tourism is effectively promoting the best drivers of tourism. Table 2 shows all activities being promoted through the social media aspect of the campaign, including ones beyond the six primary categories. The table presents the total number of Likes, Shares, and Comments made by Facebook users, by activity. The final column tallies the total number of posts related to each Secret category.

To reward contest participants with an opportunity to travel to Northwest Territories, a total of 150 'Gold Ticket' winning folders will be distributed throughout the duration of the contest. To win via social media, entrants have to "share" contest Secrets on popular social media platforms including Facebook and Twitter.

The NWT Tourism team is actively engaged in the overall social media component of the campaign. With a daily post for each Secret, along with responses to posted comments by social media users (see below for example), this high level of involvement has helped create a positive buzz and has encouraged followers. At this point in the campaign the Facebook page sits at 80 Secrets, from which much can be concluded in terms of effectiveness at driving interest in the NWT. Many of the comments are from users who indicate their interest in visiting the region, as in Figure 3.

## NWT Tourism's Dilemma

Cathie and her team realize the power of their campaign, especially in regard to the impact that social media can have in shaping the brand image of the NWT. Because digital marketing can be continuously analyzed and adjusted, this point in the campaign requires an analysis of responses to the social media posts to determine whether the effort – one post each day and a response to many questions posed by social media users – is impacting awareness. Cathie and the NWT Tourism team must determine whether this aspect of the campaign is meeting its intended purpose. Questions to consider are:

- Overall, do you feel that the campaign is having the desired impact as outlined by the goals of the NWT government? Why or why not?
- At the half way point, do you feel that NWT is focusing their Secrets in the right areas? Discuss your rationale. What changes, if any, would you recommend be made to maximize results?
- List three tourism destination images that come to mind when you think of the Northwest Territories. Does this destination im-

*Figure 2*

## NWT Secrets Pinned Locations

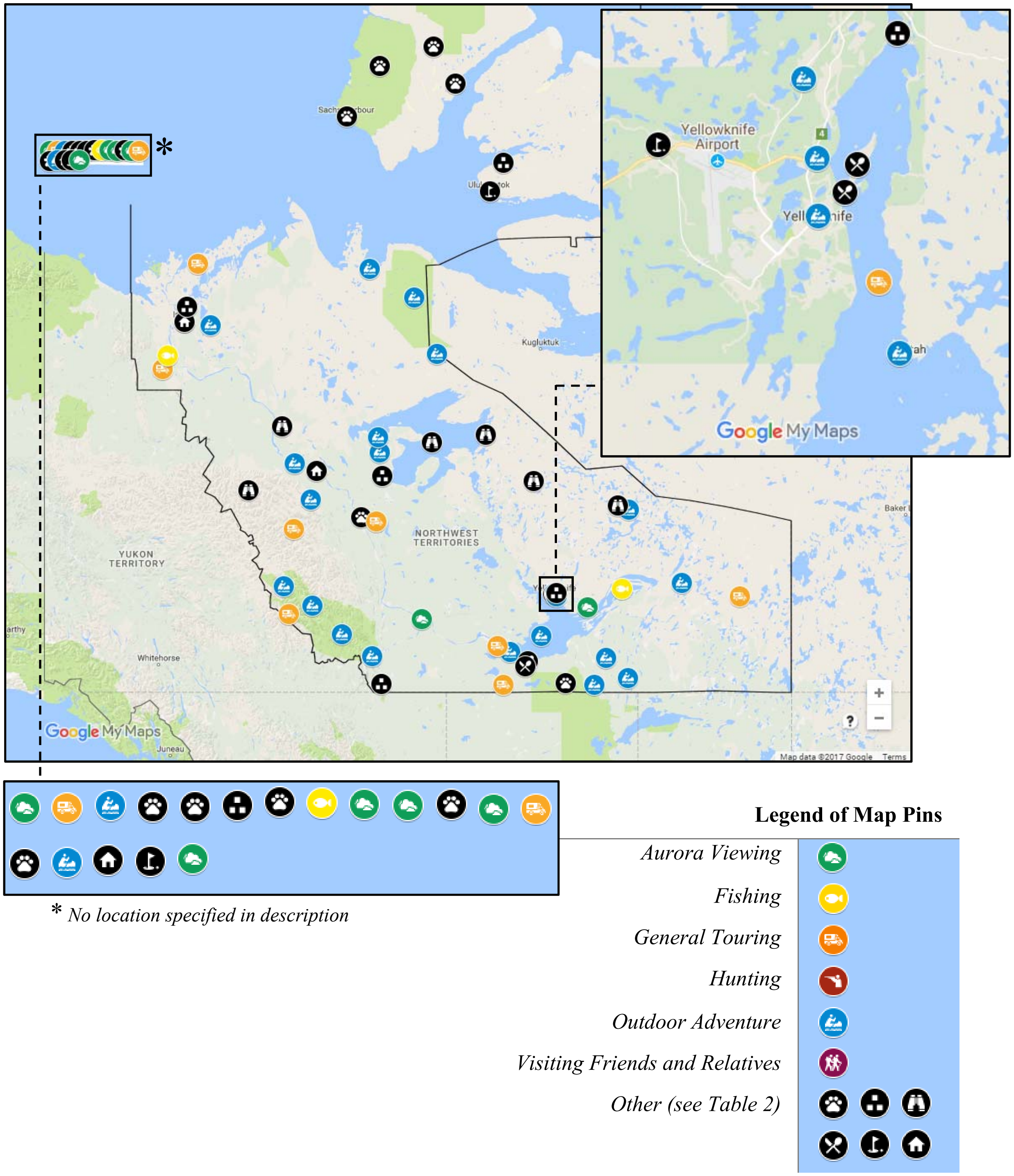


***Table 2***

## Activities by Type and Social Media Behavior

| Table 2 Activity Type | No. of Likes | No. of Shares | No. of Comments | No. of Secrets (Out of 80) |
|---|---|---|---|---|
| **NWT Categories** | | | | |
| *Aurora Viewing* | 3196 | 489 | 185 | 7 |
| *Fishing* | 768 | 157 | 53 | 3 |
| *General Touring (e.g., RVing, Scenic driving)* | 3974 | 826 | 288 | 12 |
| *Hunting* | 0 | 0 | 0 | 0 |
| *Outdoor Adventure (e.g., Hiking, Kayaking)* | 7731 | 1706 | 484 | 25 |
| *Visiting Friends and Relatives* | 0 | 0 | 0 | 0 |
| **Other** | | | | |
| *Animal Viewing* | 2873 | 557 | 174 | 11 |
| *Aboriginal Tourism (e.g., Dene events, Native heritage)* | 1440 | 266 | 84 | 6 |
| *Landscape Viewing* | 852 | 130 | 45 | 4 |
| *Food and Beverage* | 1241 | 533 | 118 | 5 |
| *Recreational Sports (e.g., Hockey, Golf)* | 457 | 148 | 18 | 3 |
| *Landmark Viewing (e.g., Museums, Churches)* | 763 | 224 | 67 | 4 |

age help or hurt their social media campaign? Next, list some ways in which NWT Tourism can better align their social media campaign with the images that you identified in the first part of this question.

- Consider the role that social media has generally on our social behaviour. Thinking about the theory of social presence, can you explain why social networking sites such as Facebook may be a better way to communicate a destination's campaign versus more traditional media forms such as through television commercials or billboards?
- Conduct a trend analysis on the tables presented in the industry background section. Specifically, which categories increased/decreased, and what do you believe caused these trends based on the information provided?
- What are some categories that NWT should consider expanding to that are not part of the six that they currently focus on? Are there areas of opportunity to attract a different type of visitor?
- Given the six categories that NWT does currently focus on, which should they consider paying less attention to in lieu of the others? Provide a justification for your response based on the trends and Facebook posts.
- Notice the Secrets without any specific locations on the map. What trend(s) do you see in their popularity given the social media responses to-date?

## References

5-Year NWT Tourism Marketing Strategy: Towards a $235 Million NWT Tourism Industry (pp. 1-88, Rep.). (2016). Yellowknife, NWT, Northwest Territories Tourism.

Annual Visitation Statistics 11-16. (2016, September). Retrieved March 15, 2017, from http://www.iti.gov.nt.ca/en/tourism-research

*Figure 3*

**Sample Facebook Post and Comments**


Baloglu, S., & McCleary, K. W. (1999). A model of destination image formation. Annals of Tourism Research, 26(4), 868-897.

Blain, C., Levy, S. E., & Ritchie, J. B. (2005). Destination branding: Insights and practices from destination management organizations. Journal of Travel Research, 43(4), 328-338.

Elliot, S. & Papadapoulos, N. (2016). Of products and tourism destinations: An integrative, cross-national study of place image. Journal of Business Research, 69(3), 1157-1165.

Kaplan, A. M., & Haenlein, M. (2010). Users of the world, unite! The challenges and opportunities of Social Media. Business Horizons, 53(1), 59-68.

Lange-Faria, W. & Elliot, S. (2012). Understanding the role of social media in destination marketing. Tourismos: An International Multidisciplinary Journal of Tourism, 7(1), 193-211.

Secrets | Spectacular Northwest Territories. (n.d.). Retrieved March 15, 2017, from http://spectacularnwt.com/secrets

The Explorer Quotient [PDF]. (2008). Canadian Tourism Commission.

*The Northern Likes: The case of Northwest Territories' social media campaign*

## Summary

This case is designed to assess an awareness campaign created by the Northwest Territories (NWT) Tourism marketing organization to build engagement with their Spectacular NWT brand. NWT Tourism launched the Secrets campaign to coincide with Canada's 150th anniversary, featuring 150 Secrets of the Northwest Territories, posted daily via social media. At just past the campaign mid-point, the location of each Secret is found to reveal certain patterns that, when used in combination with NWT Tourism's strategic objectives, consumer responses, and visitor trends over a five-year period, can be effectively pieced together to better explain the overall importance of an effective social media campaign in one of Canada's northern regions. With this, students will be given an opportunity to evaluate NWT Tourism's practical social media marketing using theoretical concepts in tourism and marketing such as destination brand and tourism destination image.

## Learning Outcomes

A key issue in this case is the ability of a destination marketing organization to properly align its strategic objectives with marketing campaign tactics. Specifically, students who complete this case study will be able to:

- Better understand how strategic objectives and campaign elements need to fit together to be successful;
- Apply their understanding of tourism theories and concepts, including tourism destination image, to a practical real-world situation; and
- Conduct trend analyses on reported data and relate results to DMO objectives.

## Target Audience

This case could be easily adapted to suit either an undergraduate or a graduate level course. For instance, at the undergraduate level, students could apply concepts of cohesive branding strategies and/or relate the social media content to their own personal experiences. At the graduate level, students could articulate their opinions about the efficacy of managing a multi-media strategy, suggest ways in which NWT Tourism could optimize the implementation, and discuss the political implications faced by government funded destination management organizations.

## Theoretical Background

As students will discover through reading the case, the higher the degree of social presence, the greater social influence communicators have on another's behaviour, known as the theory of social presence (Kaplan & Haenlein, 2010). When considered alongside the concepts of tourism destination image (TDI), which comprises the beliefs and perceptions of a place held by potential travelers (Baloglu & McCleary, 1999), students should consider the ways in which one's perceptions of the Northwest Territories may impact their response to the social media campaign and how theory of social presence, along with relevant concepts within destination branding theory, can be applied.

### *Summary of Key Learning Theories*

The following key learning theories contribute to the foundation of this paper and offer students several areas of potential investigation to determine the campaign's effectiveness:

| **Topic** | **Key Theoretical Foundations** | **Other concepts to be learned** |
|---|---|---|
| Social Media | Theory of Social Presence | Social marketing in the 21st century; Web 2.0 design and promotion; Social media and web promotional strategy; Ratio of social media to other forms of advertising engagement; Social media storytelling |
| Tourism Destination Image | Tourism destination image theory | Using Social Networking Sites to build a destination's image; Responding to a changing DMO's image as a result of User Generated Content |
| Branding and Marketing Communications | Destination branding theory | Management views of branding; DMO practices that encourage travel behavior and intentions; Comparing and contrasting social media with traditional forms of media advertising |

## Discussion Questions Answered

1. *Overall, do you feel that the campaign is having the desired impact as outlined by the goals of the NWT government? Why or why not? (Learning Outcome #1)*

   Generally, the campaign did have the desired effect as outlined by the goals of the NWT government since the major areas of interest were depicted in the 80 Secrets posts. However, there were aspects of the activities, such as visiting friends and relatives, which were not featured and could have been better covered in the social media posts.

2. *At the half way point, do you feel that NWT is focusing their Secrets in the right areas? Discuss your rationale. What changes, if any, would you recommend be made to maximize results? (Learning Outcome #1)*

   Interest will likely lessen from social media users as the campaign ends and the incentive to post and share is removed. However, NWT Tourism can offset this by continuing to provide interesting and informative posts. Overall yes, although many of their uncategorized Secrets do reveal some opportunities for growth.

3. *List three tourism destination images that come to mind when you think of the Northwest Territories. Does this destination image help or hurt their social media campaign? Next, list some ways in which NWT Tourism can better align their social media campaign with the images that you identified in the first part of this question. (Learning Outcome #2)*

   There are not necessarily any "right" or "wrong" answers to this question – however, students are likely to respond that NWT is stereotypically isolated and separated from the rest of Canada due to its geographic location. Some students may choose to describe false stereotypes, such as it always being cold in the north, or everybody living in igloos, as extreme examples. This campaign may help to limit false or negative perceptions due to its ability to connect with Canadians across the country using technology. Some ways in which the image can be modified, therefore, are to continue engaging online with target travelers, as well as maintaining branding and imagery that makes NWT seem familiar in some way.

4. *Consider the role that social media has generally on our social behaviour. Thinking about the theory of social presence, can you explain why social networking sites such as Facebook may be a better way to communicate a destination's campaign versus more traditional media forms such as through television commercials or billboards? (Learning Outcome #2)*

   Because social networking sites such as Facebook are socially driven, they allow for conversations about the campaign that cannot occur through traditional communication sources such as TV ads and billboards. That is – we can disseminate about our desire to visit NWT through a Facebook comment, but we can't tell the TV set how we feel about the commercial we just saw. This ability to socially deconstruct a campaign as it occurs allows potential visitors to have a dialogue about their plans to visit, which will encourage others to also consider visiting as a result of these strong social cues. Further, students may focus on the opportunities that instant social feedback can have on future posts from the perspective of NWT Tourism.

5. *Conduct a trend analysis on the tables presented in the industry background section. Specifically, which categories increased/decreased, and what do you believe caused these trends based on the information provided? (Learning Outcome #3)*

   A trend analysis reveals that visiting friends and family has decreased since last year in both visitation and expenditures. Hunting is also on a very slow increase compared to other categories. Aurora viewing saw a big decrease in 2014, which inflated its growth the year after. Although popular, outdoor adventure does not generate as much revenue as the other categories. Other observations are also possible from the students, but the important thing is they explain their justification for why those trends occurred based on details from the case (e.g., geographic limitations of certain activities, low shares/likes compared to other categories on social media, etc.)

6. *What are some categories that NWT should consider expanding to that are not part of the six that they currently focus on? Are there areas of opportunity to attract a different type of visitor? (Learning Outcome #3)*

   Animal viewing is the most obvious one, although others have a case as well depending on how much revenue they would bring in to the territory. Regardless of their answers to this questions, students should consider the potential economic and social impact of their suggestion – for instance, if they choose Aboriginal Tourism, this may or may not be true, depending on how much interest was generated in this topic through the social media posts. By that measure, then, things like recreational sports are likely not an opportunity for NWT to focus on (with less 'likes' than any of the others in this category).

7. *Given the six categories that NWT does currently focus on, which should they consider paying less attention to in lieu of the others? Provide a justification for your response based on the trends and Facebook posts. (Learning Outcome #3)*

   Hunting may be a sensitive topic for social media and is hard to promote without offending certain groups of people. It is harder to measure for this reason, but may also not be as appealing to visitors. NWT could find niche media to promote hunting and see if interest increases. The main point here is that social media may or may not meet the needs of the tourists depending on the topic, and some are best left for other modes of information delivery. Also, visiting friends and relatives does not seem to bring in much tourism revenue and has decreased by 21% over the past 5 years, yet NWT Tourism has not focused on this activity in their Facebook posts, so it looks like they are already consciously not promoting this. Students may observe that perhaps it is a declining category for NWT because it is a challenging form of promotion.

8. *Notice the Secrets without any specific locations on the map. What trend(s) do you see in their popularity given the social media responses to-date? (Learning Outcome #3)*

   General viewing opportunities seem to be the most popularly promoted 'non location-specific' activities, particularly in regard to auroras and animals. With a 48% increase between 2011/12 and 2015/16 in aurora viewings (despite some decreases within these years), this remains an important focus point for the NWT.

## Lesson Planning

In any of the following plans, this case is best followed sequentially, revealing the map and map pins early so that the students can begin thinking about the location of the places identified through the social media campaign. It is recommended that this case study be used to help advance classroom discussions around topics of destination branding, social media campaign strategies, and tourism destination image theory. Though multiple approaches are possible, the following instruction designs are suggested based on either individual, team-based, or imaginative role-playing lesson plans:

### *Individual Lesson Plan (60-70 minutes)*

Begin the lesson with a broad discussion about the importance of integration in a marketing campaign. That is, a company or destination's marketing strategy must align with their strategic objectives, and what may happen if they do not. Following this, provide each student with a copy of the case study to examine individually and respond to the discussion questions presented at the end (reading and responding will take the students roughly 40 minutes). Following this, bring students together to discuss their responses, ensuring that the focus on the research objectives remains a priority (20 minutes). Following the entire discussion and once all questions have been satisfactorily answered, inform the students of the exact learning outcomes and summarize with the observation that just as the class has focused on the objectives of the case to answer the questions, that marketers must do the same in order to succeed with their marketing campaigns (10 minutes).

### *Group Lesson Plan (40-50 minutes)*

Just as in the individual lesson plan, begin with a discussion about the importance of integration in a marketing campaign and the importance of aligning with a marketers' strategic objectives. Introduce the NWT Tourism case study to the class, as well as any relevant additional readings from below. After distributing a case to each group, there will be 20 minutes allotted to each team in order to think through and respond to the discussion questions at the end. The discussion questions are directly tied to the learning outcomes in this teaching note, and so an effective response by the teams will indicate their level of comprehension of the expected outcomes described there. For sample responses to the questions as well as to see which learning outcome they address, please see 'Discussion Question Answers' section in this teaching note.

Once the students have prepared their responses, spend 20 minutes with the entire class at once presenting their responses, ensuring that the discussion remains focused on resolving that questions' specific learning outcome. Following this, as in the individual lesson, inform the students of the exact learning outcomes and summarize with the observation that just as the class has focused on the objectives of the case to answer the questions, that marketers must do the same in order to succeed with their marketing campaigns (10 minutes).

### *Role Playing Plan (50-60 minutes)*

Depending on the size of the class and the level of imaginative role-playing the course allows, there is a third option which uses a situational role-play in lieu of a traditional form/discuss/present model. Here, have the students form into a total of 6 groups, where each group represents a different activity as described by NWT Tourism: Aurora viewing, fishing, general touring, hunting, outdoor adventure, and visiting friends & relatives. Within the groups, students will be asked to play the role of Cathie Bolstad's Marketing Team, with the instructor playing the role of Cathie herself. The role-play exercise is simple: each team will have a total of 25 minutes to create support for their activity and why it deserves attention from Cathie in her budget and implementation in her social media campaign.

To support their activity, students may choose a number of creative ways to encourage 'Cathie' to give priority to their team's activity. Some ideas include filling out a pre-made map of NWT with key locations where their activity takes place, forecasting trends in visitation and expenditures into the future, designing their own Facebook Secrets post to demonstrate that activity's appeal to potential tourists, and more. By the end of the initial preparation, 'Cathie' will then invite each team to present their efforts to her. This phase is expected to take 30 minutes (6 groups with 5 minutes per group). By the end, 'Cathie' will determine which campaign activity will receive the most from Cathie's budget and be the focus of her social media campaign (5 minutes).

### *Homework Assignments*

Although not a requirement for instructors, it may be beneficial to have students think about drafting some stronger connections between practice and theory. If that is the case, there is a good opportunity to provide the students with a 'thought paper' homework assignment, in which they consider their responses to the discussion questions and what the implications might be for the Secrets campaign. Students can then write a one-page report on what they believe the end of the campaign will look like in two scenarios: (1) NWT Tourism responds to the suggestions they provide, and (2) NWT Tourism does not. Simply writing 'they will succeed' or 'they will fail' is not enough – the students must attach their summaries to the learning outcomes described in this teaching note, and ensure that at least some of their answer addresses tourism and marketing theoretical concepts as well as practical ones.

## Additional Readings

Instructors can prepare for the lesson ahead of time by referring to the documents below. Once the case analysis is complete, students are also encouraged to think beyond the case, especially in determining whether the total campaign was indeed successful for NWT:

NWT Industry, Tourism and Investment (http://www.iti.gov.nt.ca/en)

NWT Tourism Secrets Campaign website (http://spectacularnwt.com/secrets)

Kawasaki, G., & Fitzpatrick, P. (2014). The Art of Social Media: Power Tips for Power Users. Penguin.

Kerpen, D. (2015). Likeable Social Media, Revised and Expanded: How to Delight Your Customers, Create an Irresistible Brand, and Be Amazing on Facebook, Twitter, LinkedIn, Instagram, Pinterest, and More. McGraw Hill Professional.

Vaynerchuk, G. (2013). Jab, jab, jab, right hook: How to tell your story in a noisy social world. Harper Business.

Baloglu, S., & McCleary, K. W. (1999). A model of destination image formation. Annals of Tourism Research, 26(4), 868-897.

Lange-Faria, W. & Elliot, S. (2012). Understanding the role of social media in destination marketing. Tourismos: An International Multidisciplinary Journal of Tourism, 7(1), 193-211.

## References

Baloglu, S., & McCleary, K. W. (1999). A model of destination image formation. Annals of Tourism Research, 26(4), 868-897.

Kaplan, A. M., & Haenlein, M. (2010). Users of the world, unite! The challenges and opportunities of Social Media. Business Horizons, 53(1), 59-68.

# When a Food Quality Issue Goes Viral: The Case of Stop Bugging Me with the Broccoli!

*By Tod A. Nissle, E. Oliver Sach and Donald G. Schoffstall*

## Introduction

Manufacturers commonly use contract foodservice companies to provide onsite cafeteria service (Society for Hospitality and Foodservice Management, 2015). The cafeterias are open while employees are working, often covering several shifts. Historically, cafeterias are viewed as an important amenity, but with pressures to control or even reduce costs, facilities do not always receive the investment needed to prevent aging infrastructure (Rosales, 2014). This case took place in a cafeteria built during the 1960's, where the contract foodservice company provided around the clock foodservice at a site within the main manufacturing building. The broccoli incident took place in a building within a larger corporate campus. The site where the incident occurred employed union workers across a total of three shifts. On average, one-third of these employees purchased items from the cafeteria each day, with the evening shift serving the lowest volume. The cafeteria staff consisted of a small team who shared cooking, cashiering, serving, and cleaning responsibilities. The manufacturing employees were regulated to a time enforced break; therefore, it was critical they were served quickly after the moment they entered the cafeteria. During a recent evening shift, the team underestimated the number of broccoli portions to prepare, causing customers to wait while more was prepared. The broccoli was a side item served along with prime rib, one of the top selling menu items. Events quickly spiraled out of control when a staff member took a shortcut and failed to follow standard food preparation procedures. This lead to a customer discovering his undercooked vegetables crawling with small insects. He then addressed the issue in one of the most impactful ways possible, beginning his own social media campaign.

Following the reading of the case study and completion of the discussion questions provided, the reader should be able to:

- Describe some challenges unique to contract foodservice
- Understand quality assurance and training in a contract foodservice setting
- Explain how social media can impact foodservice establishments

**Tod A. Nissle, E. Oliver Sach** *and* **Donald G. Schoffstall** *are all affiliated with Johnson & Wales University – Charlotte.*

## Story Background

### The Environment

Fleet Incorporated (Fleet) is a prominent manufacturing company located in the Northeast United States. Central to the ability of Fleet to maintain production efficiency is the requirement of a quality foodservice operation located near their manufacturing lines. To ensure the quality of this provision, Fleet recently hosted a foodservice evaluation process over a period of more than eighteen months, resulting in the retention of their existing long-term foodservice contracting company, Cater-Fresh, one of the largest on the Northeast Coast. The contract retention is an indication that Fleet has been satisfied with the overall performance of Cater-Fresh.

Within this vast environment are numerous buildings, each provisioned with a cafeteria to provide meal options for Fleet employees. Due to the size of the facility, there is no opportunity to leave the location during a break; therefore meals must be purchased in one of the cafeterias or brought from home. The company employs over 10,000 associates throughout a corporate campus with nearly one thousand in the facility where the incident occurred. A unique aspect of the Fleet site is that the facility follows strict security protocols which are tightly enforced, designed to prevent unauthorized individuals from accessing the site.

Roughly 30% of the employees choose to eat from the cafeterias, a metric that is consistent with the manufacturing industry as a whole (Society for Hospitality and Foodservice Management, 2015). Over three separate shifts, the cafeteria staff serves a total of 300 meals, with the evening shift providing 50 meals nightly. The cafeterias offer a hot meal service as well as grab and go options designed to support employee breaks that are regulated to 30 minutes and strictly enforced. The particular cafeteria referenced in this case is surrounded by other buildings each with their own cafeterias, all within a five-minute walk. However, throughout the corporate campus employees will generally choose to eat at the cafeteria connected to their building, mainly due to time not desire. This particular cafeteria was originally built in the late 1960's and although maintenance has been performed as needed it has not been updated for appearance, aesthetics, or employee comfort, which has lead to employee complaints in the past.

### Business to Business Relationship

Cater-Fresh integrates with Fleet through a network of managers who work for the manufacturing company. A system of performance indicators is used to evaluate and track business performance across all cafeterias, in all buildings. Referred to as key performance indicators, these include items such as opening on time, the variety required, customer satisfaction, and program participation targets. Fleet's reputation amongst their employees is dependent upon the successful performance of the vendor. Employee services within this large manufacturing site are often targets for criticism and are therefore closely watched and carefully managed. With a unionized workforce, the employee's voice is strong with company management and though some minor issues have occurred between the employees and Cater-Fresh, nothing in the past has been spread around the campus like a few of the minor issues (timeliness; customer service) recently.

## Related Literature

### *Quality Assurance & Training*

A majority of reported cases involving customers who got sick from food can be traced back to licensed businesses and eating establishments (Cotterchio, Gunn, Coffill, Tormey, & Barry, 1998). While this particular case never involved an illness, the failure to follow safety protocols resulted in a situation for the foodservice contractor that was equally devastating. Incorrect or neglectful food handling practices lead to safety and security risks causing lasting consequences for everyone involved (Cotterchio et al., 1998). Consumers report a near zero-tolerance when it comes to dirty food in a restaurant establishment, as their primary reason for the visit is typically to consume food (Park & Almanza, 2015). However, this is not new, and since adhering to practical, standardized operating models results in a high success rate, and when combined with training can avert food safety issues associated with food production, has been recommended for years (Wodi & Mill, 1985).

Irrespective of cost, foodservice companies must provide their teams with continuous training, requiring them to follow strict processes and prioritize customer safety as their primary concern (Yiannas, 2009). As this case highlights, there are new risks organizations must consider when making decisions on how much to invest in quality assurance and training. As with other service-industry areas, Canziani (2016) reported employees and managers need training in empathy towards the affected individual along with being able to provide personalized service and corrections.

### *The Environment & Customer Service*

Often referred to as servicescapes, physical environments can have a significant impact on customers' perceptions of quality (Chua, Othman, Boo, Abkarim, & Ramachanddran, 2010). Chua, Othman, Boo, Abkarim, and Ramachanddran (2010) explained that environments perceived as unfavorable negatively influence customers' psychological state and can trigger a heightened chance of dissatisfaction with the experience overall. When this is taken one step further and unfavorable servicescapes are combined with the absence of favorable guest service, something like bug-infested broccoli can become an enormous issue (Chua et al., 2010). In this case there was a compounded effect, where the combination of an unfavorable physical environment, less than acceptable service, and unacceptable food quality standards resulted in a dramatic and disruptive customer response. For foodservice establishments, customers have previously highlighted food, service, and atmosphere as important expectations (Bufquin, Partlow, & DiPietro, 2015).

Contrary to this, research has also identified a correlation between the physical condition of a restaurant environment and customers' expectations that create positive outcomes. Older locations can be successful due to lower customer expectations than what they expect to find in modern environments (Wall & Berry, 2007). This understanding may present an opportunity for older locations as research illustrates that customer service and meaningful human interaction can overcome negative environmental factors. This case suggests that the service provided was inadequate to overcome the food quality incident. In aging facilities, customer service and food quality must be the focus, and this case is an example of where it comes up short. The successful provision of quality food and exceptional customer service often determines whether the business can retain customers and attract new ones, not necessarily the condition of the infrastructure itself. Failures, in the absence of exceptional customer service, can help feed into an environment of retribution (Oflac, Sullivan, & Baltacioglu, 2012). In this case, that is exactly what occurred, as the customer pursued a social media campaign focused on retribution. These factors aside, in the foodservice business nothing substitutes quality as the most fundamental attribute of the product itself (Meiselman, 2001).

### *Social Media*

Today, whether an establishment is a hole-in-the-wall or a fine dining operation, social media can have an impact (positive or negative) on the restaurant operation from the perspective of customer visits (new or returning), sales, and marketing. The contract foodservice segment, however, is a little different when compared to the restaurant segment, in that social media did not have such an impactful presence at first (Lautenschlager, 2006). Before social media existed anywhere, it used to be that one disgruntled customer told about ten people, which seemed dangerous then (Goodman & Newman, 2003). However, with the growth of social media, Corstjens and Umblijs (2012) explained that today one disgruntled customer could reach thousands, or even millions, in a single keystroke and the damage caused by negative social media significantly outweighs any positive contributions. Thus, businesses today operate in a new age of information transparency, and customers are using social media to instantly communicate the good, the bad, and the ugly. Flaming is a modern term used to describe the adverse impacts of a social media slander campaign; today it is a common occurrence (Verma, Nitin, & Srivastava, 2016). Reputations are at stake as consumers' perceptions and comments can blur the lines between libel and slander, leading to serious business sustainability issues (Svantesson, 2009). Svantesson (2009) stated that to survive in the modern age, company owners and managers must develop strategic social media strategies to understand both the nature of social media and human interest in sharing experiences digitally. There is also a reality check that must be acknowledged in all of this; controlling free speech through social media, and in this case, the customer's use of it, is simply not an option. This leaves businesses at a crossroads in how to evaluate the new public relations risk posed by social media and whether it warrants a rethinking of how and what we invest in our operations to mitigate the chances of receiving negative publicity.

## The Situation

### *The Dinner-shift Foodservice Team*

Three meal services were offered throughout the day to align with manufacturing staffing levels. The cafeteria was open from 3:00 PM-9:00 PM for dinner service. Of the 50 meals served per night, the majority were provided between 6:30 PM-7:00 PM, coordinating with employee break times. Due to the small number of meals served, a cohesive team of three Cater-Fresh employees covered this shift, consisting of a supervisor and two employees. A majority of the food was prepared on site; however, the use of convenience based products and semi-homemade items were leveraged due to the extensive menu and small foodservice team.

The small team of three had been working together since 2013, and along with the manufacturing employees, they were also unionized. Jeff was the evening supervisor while Mary and Rick were hourly employees. Jeff was a tenured foodservice employee with ten years of industry experience. Mary had five years of foodservice experience and was formerly a customer service representative. Rick was the rookie on the team with three years of experience and had recently transferred from another foodservice company location in 2013, after entering the industry directly out of high school. Due to the nature of the business, the team shared responsibilities and was cross-trained in order to quickly move between job functions. Everyone worked the same shift, eight hours per day from 2:00 PM – 10:00 PM. The team had autonomy to create menus specific to the requirements of their building's population and was ultimately responsible for all business activities during the time they were scheduled. Jeff reported to the General Manager, Karen, who worked from 9:00 AM – 5:00 PM; the two spent only a few hours together each day. Karen, a trained chef with eleven years of foodservice experience, had been in her current role for a little over two years. Karen and Jeff were the only two employees who also had a formal sanitation certification, though all Cater-Fresh employees received some basic training.

### *Just an Ordinary Night*

Since cafeteria locations were closed on weekends in most contract foodservice locations like this one, Mondays were essentially opening from scratch each week. Thus, most service-related errors at this site had historically occurred on Mondays, more than any other day of the week. So when Jeff, Mary, and Rick arrived for work on a seemingly normal Wednesday during the summer, the handoff from the day shift was uneventful, and no issues were reported; all three employees figured on smooth sailing for the duration of their shift. Inventory was on hand, all equipment was operational, and it happened to be Mary's work anniversary, so the team was in good spirits. The main menu item that night was prime rib, an item well received by the Fleet employees, and the Cater-Fresh team was looking forward to service as they had received accolades when serving this in the past.

### *Taking Shortcuts*

At 6:30 PM, the café quickly filled with Fleet employees, with their interest and appetites focused on the prime rib. Steamed broccoli was offered as the only side item, prepared that way to align with the direction from Fleet's wellness committee. At 6:45 PM, Jeff served the last of the broccoli and called upon Rick to prepare more. The call for more inventory occurred late as Jeff had underestimated the demand for prime rib. The broccoli was ready in advance, lightly seasoned and placed on baking racks to enable quick response time, a process known as mise en place. Unfortunately, on this particular evening, only one tray of broccoli had been produced for the entire meal service. In his haste and under pressure, Rick took unwashed broccoli from the refrigerator, and without cleaning it, quickly cut it into florets and placed it into the steamer. Seconds seemed like hours while waiting for the process to end, and as the pressure for the product increased, Rick pulled the broccoli from the steamer before it had finished cooking. The product was rushed to the serving line and provided to the waiting customers, without any of the usual quality assurance protocols being followed.

### *High Five – We Killed the Line!*

During peak business hours, working in kitchens was both thrilling and frightening. It was a business of hurry up and waits, particularly in a routine environment like Fleet. With up to 50 people in line, all with less than 30 minutes to return to work, the pressure was on to get them through the process quickly. Immediately after the last person in line was served, Jeff, Rick, and Mary were hand-slapping and celebrating the conclusion of another stressful event. In fact, the staff had coined the term "line busting" and kept a diary to record how quickly customers were served. It had become part of their culture and something they tracked and celebrated over the years. They recognized success when everyone was served within 10 minutes or less; a feat they achieved this night by a very slim margin. The team went on to finish their shift and closed out the day without any knowledge of the repercussions that were about to unfold.

### *Just Another Customer*

Mike was a long term Fleet employee who worked the evening shift and occasionally used the cafeteria for meals. He had been frustrated with the lack of fresh offerings and the inconsistent variety provided by the cafeteria staff. He had surfaced concerns in the past but had felt that no action had ever been taken to address them. Thus, his perception was that there had been no effort to change or improve and that the staff was indifferent to his concerns and requests. Additionally, Mike and other employees had made comments concerning the old and run-down appearance of their building's cafeteria compared to other cafeterias on property, choosing to place blame on poor upkeep by the cafeteria staff.

Mike was a vegetarian, and therefore, this Wednesday evening, he decided to order a plate of steamed broccoli as he was unable to find any other suitable options. Mike had to wait for his broccoli as the team ran out of inventory just as he arrived. By the time Mike received his steamed broccoli, he was already upset with the limited offerings and his wait for the one item he had to choose. Upon receiving and paying, Mike proceeded to the seating area and noticed that something was not right with his food. Looking closer, he saw small insects crawling out of and over his plate of broccoli. Mike did not attempt to discuss the issue with anyone on the Cater-Fresh team; rather he took photos of the food and spent the remainder of his break posting them on Facebook, Instagram, Twitter, and even Fleet's intranet sites.

Just a Couple of Posts: Mike's social media posts, though rather short and simple ("I can't believe they would serve me bugs – LOOK!", "So tired of the FILTHY & OLD cafeteria and INCOMPETENT staff", and "BUGS, they served me freaking BUGS!"), were edgy and quickly caught the attention of some of his fellow employees on their breaks throughout the rest of the night. Quite a few employees began liking, commenting, and sharing the posts throughout their breaks. Within an hour or so, day shift employees (the largest group of employees) and even some of their spouses and girlfriends/boyfriends, began to comment on the posts and pictures. By the time his shift was over a few hours later, the posts had been viewed and shared over 1,000 times by employees across Fleet on every work shift. There were so many shares and reposts (retweets) that caught the attention of some of the employee leaders that they began a petition to remove Cater-Fresh from across the campus; at the end of the day a formal petition was sitting on the desk of Fleet's CEO.

### *Clean Up on Aisle Five! What Just Happened?*

Jeff's day got off to an early start Thursday morning when the phone rang at 7:00 AM. David, the Vice President for Cater-Fresh, awoke him with a furor of questions to understand what happened after speaking with Karen (GM), who was tipped off by an overnight employee with whom she was close. Jeff was stumped and could hardly believe what he was hearing. He had received no feedback from customers about an issue, yet as Karen and David had been finding out, there were pictures of bug-infested food from his cafeteria last night shared across the Fleet organization. Some employees had even begun printing and posting pictures on building entrances to illustrate the egregiousness of the incident. Comments and slanderous remarks were sent from numerous locations across the country and around the world as the news reached many of Fleet's global offices throughout the entire organization. There were even rumors that the local news stations were considering picking up the story, but were sufficiently quelled by Fleet's community relations team throughout the day.

Cater-Fresh, who had only recently celebrated the retention of the Fleet account immediately discovered a new environment of hostility and potential contract termination. Calls went out for help, and a Cater-Fresh emergency response team of more than 40 professionals were assembled from all over the country. The team immediately went to work investigating the entire enterprise to identify the potential of a systemic issue. The review illustrated several key areas of concern: a lack of training and the prioritization of service speed being the focus opposed to safe food handling practices.

### *A Glimpse into the Aftermath*

Comprehensive improvement plans were developed and deployed in all cafeterias. Employee training was completed over the course of several months on nights and weekends to avoid any business disruption. Employees, regardless of tenure, were all trained on safe food handling practices (using a national sanitation certification program) and were all required to complete fifty hours of additional food safety training per year ongoing. All locations were required to attain an internationally recognized ISO (International Standards Organization) certification for foodservice, a rigorous systems and review process that signifies process excellence and an ongoing commitment to continuous improvement. This involved comprehensive management training beyond the scope of the traditional work day, something all managers would complete in their free time. The response plan initially cost Cater-Fresh more than $100,000, with ongoing annual operational costs exceeding five times that amount. Perhaps most importantly was the untold damage to the Cater-Fresh brand. This impact continues to reveal itself over time as the company competes for new business while having this blemish on its brand.

## Case Summary

The case presented the story of a foodservice incident that happened on what was assumed to be an ordinary Wednesday for Cater-Fresh employees at a cafeteria on the campus of Fleet Corporation. In the story were relevant facts focused on issues such as cafeteria food quality, service, and training, which when placed in this unique, modern setting became the catalyst for an immediate and overnight negative social media campaign. The Cater-Fresh staff did not follow proper techniques when handling and cooking the broccoli, which resulted in the food quality issue. Mike, a customer with a history of complaints against the contract foodservice provider in his workplace, took to multiple forms of social media, and with a manufactoring facility of over 10,000 associates, the news spiraled out of control almost immediately.

## Key Questions

- What are the primary and secondary service failures that occurred throughout this case study that may have exacerbated the situation, causing Mike to respond in the way he did?
- How could Jeff, and the foodservice team as a whole, have caught the bug infested food before Mike? Why did this go unnoticed?
- Based on what you read in this case study, what does Cater-Fresh need to do to ensure this does not happen again?
- How could Jeff have better prepared his staff to respond to the broccoli shortage during service?
- What is an appropriate best practice for responding to negative social media incidents?
- How could a more engaging customer service approach have averted Mike from wanting to take a retaliatory response?
- How had Jeff and Karen failed to recognize and respond to the underlying customer concerns that led to Mike feeling the way he did? What could they have done differently?
- Do you think other concerns such as the feelings towards a poor environment contributed to the case issues? How could the team overcome an environment that has not been updated since the 1960's? Is this even possible?
- What is the best way to respond to Fleet's CEO to instill confidence that Cater-Fresh is still the best suited to operate the foodservice program, despite the recent incident?

## References


Abston, K. A., & Kupritz, V. W. (2011). Employees as customers: Exploring service climate, employee patronage, and turnover. Performance Improvement Quarterly, 23(4), 7-26.

Acosta, D. M. (2014). Tweet up? Examining Twitter's impact on social capital and digital citizenship in higher education. About Campus, 18(6), 10-17.

Bufquin, D., Partlow, C. G., & DiPietro, R. B. (2015). Measuring restaurant patrons' perceptions and expectations: An importance-performance analysis using the DinEX model. Journal of Foodservice Business Research, 18, 226-243. doi: 10.1080.15378020.2015.1051430.

Canziani, B. (2016). Service recovery: Blending quality assurance and hospitality. Journal of Travel and Tourism Research, '16-special issue, 28-28.

Chua, B. L., Othman, M., Boo, H. C., Abkarim, M. S., & Ramachandran, S. (2010). Servicescape failure and recovery strategy in the foodservice industry: The effect on customer repatronization. Journal of Quality Assurance in Hospitality & Tourism, 11(3), 179-198. doi:10.1080/1528008X.2010.483419.

Corstjens, M., & Umblijs, A. (2012). The power of evil: The damage of negative social media strongly outweigh positive contributions. Journal of Advertising Research, 52(4), 433-450.

Cotterchio, M., & Gunn, J. (1998). Effect of a manager training program on sanitary conditions in restaurants. Public Health Reports, 113(4), 353-358.

Fattah, H. (2003). America untethered - Wireless communication is beginning to have a notable impact on our social behavior. For businesses, that's an intriguing proposition - and a major problem. A look at what ethnographers have observed about our changing social habits, thanks to the rising use of cell phones. American Demographics, 25(2), 34-39.

Gazzoli, G., Hancer, M., & Park, Y. (2010). The role and effect of job satisfaction and empowerment on customers' perception of service quality: A study in the restaurant industry. Journal of Hospitality & Tourism Research, 34(1), 56-77.

Goodman, J., & Newman, S. (2003). Understand customer behavior and complaints. Quality Progress, 19(3), 1-5.

Gossett, L., & Kilker, J. (2006). My job sucks. Management Communication Quarterly, 20(1), 63-90.

Gruber, D. A., Smerek, R. E., Thomas-Hunt, M. C., & James, E. H. (2015). The real-time power of Twitter: Crisis management and leadership in an age of social media. Business Horizons, 58(2), 163-172. doi:10.1016/j.bushor.2014.10.006.

Hanna, R., Rohm, A., & Crittenden, V. L. (2011). We're all connected: The power of the social media ecosystem. Business Horizons, 54(3), 265-273. doi:10.1016/j.bushor.2011.01.007.

Kinicki, A., & Fugate, M. (2016). Organizational behavior: A practical problem-solving approach. New York, New York: McGraw-Hill Education.

Lautenschlager, J. L. (2006). Food fight!: The battle over the American lunch in schools and the workplace.

Jefferson, N.C.: McFarland & Co.

Meiselman, H. L. (2001). Criteria of food quality in different contexts. Foodservice Technology, 1(2), 67-77.

Oflaç, B. S., Sullivan, U. Y., & Baltacioğlu, T. (2012). An attribution approach to consumer evaluations in logistics customer service failure situations. Journal of Supply Chain Management, 48(4), 51-71. doi:10.1111/j.1745-493X.2012.03280.x.

Park, H., & Almanza, B. (2015). Consumers' reactions to sanitation in casual dining, quick-service, and fine dining restaurants. Hospitality Review, 31(4), 19-40.

Rosales, J. (2104, January 29). Aging school kitchens undermine healthy meal preparation. NEAToday.

Retrieved from http://neatoday.org/2014/01/29aging-school-kitchens-undrmine-healthy-meal-preparation/Society for Hospitality and Foodservice Management. (2015). SHFM Annual Benchmarking Study [Industry Annual Report]. Retrieved from http://shfm-online.org/resources/original-research

Svantesson D. J. B. (2009). The right of reputation in the internet era. International Review of Law, Computers and Technology, 23(3), 169-177. doi:10.1080/13600860903262230.

Thomas, J. (2008). From people power to mass hysteria. International Journal of Cultural Studies, 11(3), 362-376.

Verma, R., Nitin, N., & Srivastava, A. (2016). On behavioural responses and different shades of flaming in social media and computer-mediated communication. International Journal of Human Capital and

Information Technology Professionals, 7(4), 33-49. doi:10.4018/IJHCITP.2016100103.

Wall, E., & Berry, L. (2007). The combined effects of the physical environment and employee behavior on customer perception of restaurant service quality. Cornell Hotel and Restaurant Administration Quarterly, 48(1), 59-69.

Wodi, B. E., & Mill, R. A. (1985). A priority system model for sanitation management in food service establishments. American Journal of Public Health, 75(12), 1398-1401.

Yiannas, F. (2009). Food safety culture: Creating a behavior-based food safety management system (Food microbiology and food safety series; Food microbiology and food safety series). New York: Springer.

*When a Food Quality Issue Goes Viral: The Case of Stop Bugging Me with the Broccoli!*

## Introduction/Summary

This case study told the story of how food quality and training issues could impact contract foodservice operations and lead to a rather immediate social media compaign that could have ended a multi-million dollar contract. Fleet Inc. was a multi-building manufacturing facility whose employees had the benefit of on-site cafeterias provided by a large contract foodservice company, Cater-Fresh Inc. The broccoli (food saftey) incident took place at a building within a larger corporate campus employing union workers across a total of three shifts. During a recent evening shift, the Cater-Frech production team underestimated the number of broccoli portions to prepare, causing customers to wait while more was cooked. The broccoli was a side item served along with prime rib, one of the top selling menu items. Events quickly spiraled out of control when a staff member (Rick) took shortcuts and failed to follow standard food preparation procedures. This lead to a customer (Mike) discovering his undercooked broccoli crawling with small insects, which he then addressed in one of the most modern and impactful ways possible, by kicking off his own social media campaign.

## Target Audience

This case study will resonate with most students at the undergraduate level with relevance for hospitality, business, communications, and marketing majors. The case also provides application for graduate level students given the broader complexity of the issue at hand, and at the instructor's choosing can be examined more in-depth focusing on future impact. The variety and difficulty of the learning activities are adjustable to match the students' experience level/s, with the undergraduate level addressing the various questions included in the case and with the graduate level examining more complex implications stemming from negative publicity that goes beyond impacting the experience of a single customer and puts an entire contract at risk.

## Learning Outcomes & Objectives

Students must thoroughly read and understand the case study in order to develop meaningful conclusions with regards to the situation faced by all parties involved. The case study includes nine key questions that are designed to assist students in validating their comprehension of the situation as well as practical methods for developing solutions and identifying ways to mitigate the cause. These same key questions will be revisited as part of a class lesson in order to connect the broader case with fundamental business management considerations. Graduate level students should also complete the additional reading recommendations.

Students will benefit from the case study by having a line of sight into operating challenges faced by foodservice providers and the importance of sustaining robust response programs for mitigating risk. After reading the case study, the additional materials, and completing the lesson, students should:

- Describe some of the immense challenges faced in contract foodservice situations.
  - Higher-level (upper-level or graduate): Differentiate the difference between foodservice settings in restaurants (more common knowledge) to the environment presented in the case (large manufacturing facility and contract foodservice).

A comprehensive understanding of the operating structure between large manufacturing facilities and the contract foodservice industry, as well as the importance of this workplace benefit to the employee, has been presented. Unless a student has worked in a similar environment or has exposure to the uniquenesses within this industry, visibility to these operations is often not common to the general public. Thus, this study provides valuable insight on how these facilities operate and some of the challenges that can be unique to these operational environments.

- Understand how quality assurance and training impacts operational outcomes in contract foodservice.
  - Higher-level (upper-level or graduate): Evaluate what may have caused the specific issues presented in the case and establish a plan for prevention in the future.

The absence of robust quality assurance and training can expose businesses to a variety of safety issues. This case is focused on how a quality assurance issue turned into a large-scale problem as a result of a social media campaign. Students should be able to recognize the variables involved within the foodservice industry that can make it difficult to deliver consistent product quality and customer service. As this case highlights, when process gaps develop, so does the immediate risk of a mistake. Students will be better able to identify how critical it is that accountability is maintained via robust systems and processes regardless of the operation size or scope.

- Explain current (presented) and new threats to contract foodservice from social media.
  - Higher-level (upper-level or graduate): Construct a social media control plan to reduce risks to the company in the event of disaster (man-made or natural)

Students should be able to explain the need for contract foodservice businesses to proactively examine and identify new risks to their reputation and operating profits with the evolution of social media and other communication technologies. Although not traditionally a focus, this case study exemplifies a threat to reputation and profits;

this threat must not be ignored.

- Understand how facility condition can influence perceptions and profitability within contract foodservice.
  - Higher-level (upper-level or graduate): Compare and contrast an older food service facilty with a newer facility, specificially differentiating the challenges they could pose to food safety and food service.

The state of the physical environment affects patrons' perceptions of quality and must be considered as an important factor in the overall profitability and success of the operation. This is a critical element to understand, as a modern and well-kept infrastructure can mediate the idea of quality in the minds of customers.

## Teaching approach and strategies

### *Prior to Class*

Students should be required to have read the case study and to develop some thoughts using the fundamental questions captured within the case study. Students should be expected to have a general understanding of the following topics:

- Contract foodservice operations / business to business relationships
- Customer service (good versus bad)
- Influence of facility condition on customer expectations
- Basic food safety practices
- Quality assurance
- Training programs
- Social media / electronic communications

There are numerous ways the material from the case study can be examined as part of the lesson. For both teaching options, the approach is two-fold and involves small group sessions responding to key questions from the case study. This is addressed under the Small Group Discussion subsection and helps ensure that many of the key learnings from the scenario are absorbed. To build upon the initial class discussion, additional follow-up assignments are included that require a more in-depth analysis as part of a writing assignment for both graduate and undergraduate level students. This approach is addressed under the subsection Follow-up Activity.

## Lesson Plan 1 (60 Minutes)

### *Small Group Discussion*

The instructor should form four small groups and have each group develop a summary of the case study and key learnings (10 minutes). They should then discuss the following three questions, forming their thoughts to present to the rest of the class for broader discussion and debate. Each group should be given no more than 30 minutes (10 minutes per question). Once the class reconvenes, have each group, provide a 5-minute summary (20 minutes total for all four groups). Additional contributions should be inserted by the instructor to ensure most facets of what took place leading up to, during, and even after the scenario are discussed and addressed.

1. What are the primary and secondary service failures that occurred throughout this case study that may have exacerbated the situation causing Mike to respond in the way he did?

*Insight:*

*Customer service:* There were several customer engagement opportunities or moments of truth that were entirely missed by the Cater-Fresh staff. There was a lack of concern about the customer (Mike) from the start. The staff did not seem to care about the fact that he had to wait. More importantly, Mike was not treated as an individual, and there were very few items that even appealed to him as a vegetarian. There was no awareness regarding whether customers were satisfied following their purchase. Visiting customers and checking on their satisfaction would provide valuable feedback and promote a caring and hospitality focused cafeteria.

*Food Safety:* Customers consumed food; it must have been safe to eat. Protocols that were created for the preparation and serving of food were designed to ensure wholesomeness and safety. Not following standard processes was risky, and as illustrated in this case, could have damaging results. Before all else, the team should make sure that food was served with safety protocols as a primary obligation.

*Misaligned Key Performance Indicators:* The Cater-Fresh team was prioritizing speed as their main pursuit. This pursuit was out of balance with the priorities of the customers. While serving food fast was important, it was pursued as more important than safety and variety. Prioritizing options for non-meat eating customers, other than the side item, could have made a valuable impact on the overall satisfaction of the customer. Treating customers as individuals and attending to their needs is critical in maintaining favorable relationships. The customer (Mike) had to wait, yet no one seemed to focus on anything other than taking short cuts to provide him food as soon as possible. There were numerous ways the team could have managed the situation with Mike, including taking precautions with preparing the food, offering him a discount, apologizing or simply paying attention to the food being served. The overall lack of caring was the most damaging event that occurred during this encounter.

2. How could Jeff, and the foodservice team as a whole could, have caught the bug infested food before Mike? Why did this go unnoticed?

*Insight:*

Had Jeff taken a moment to inspect the product before placing into the servery, he would have likely seen the bugs and caught it before Mike. This was an example where standard food preparation procedures were not followed, creating the subsequent failure to inspect the food before serving. Adding in the simple step of the chef tasting the food before serving was a prerequisite that should have been standard practice. Many chefs have disposable sample spoons on hand for this purpose, but commonly they go unused. In this case, the undercooked food passed through all three employees, the person who cooked it, the person who served it, and the person who sold it. This illustrated a systemic issue where the staff was ignoring food quality and was not engaged in the customer experience.

3. Based on what you read in this case study, what does Cater-Fresh need to do to ensure this does not happen again?

*Insight:*

As part of a broader review, sponsored at the executive level, Cater-Fresh must implement much more rigorous quality assurance, training, and compliance systems. At the unit level, customer service training and development must be a priority along with frequent third party quality control inspections. The team should also revise their production forecasting to ensure accuracy and prioritize customer satisfaction. Running out of food promotes poor service and unfavorable guest relationships.

### *Follow-up Activity*

In order for students to build upon the learnings from the case study, an additional activity is proposed that can be provided to students, requiring them to complete a writing assignment (due at a later time). This writing assignment can build upon the small group lesson work and is focused on social media strategies, intended for both the graduate and undergraduate level with appropriate adjustments in scope and expectations. An additional 3-5 references should be included beyond the case study itself to respond to one of the following:

- Develop a strategic social media plan that can help companies respond to emergency situations such as the issue in this case. Include key stakeholders, timelines, methods for deployment, and associated training.

*Insight:*

Having a trusted process for the customer to follow when something does not go right, reduces the risk of someone using their own method to communicate the issue. A customer focused staff, an emergency hotline, or a responsive online grievance system could all provide solutions for customers. Mike did not have any of these options to consider. When he decided to extend a social media campaign, the situation took on critical mass. Software systems to monitor online chatter and trends are widely available and provide opportunities for companies to identify issues as they occur, providing valuable time to get in front of the issue and attempt resolution.

## Lesson Plan 2 (90+ minutes)

### *Small Group Discussion*

Lesson plan 2 expands upon the first option with additional questions and more in-depth discussion on the possible solutions. The instructor should form four small groups, and assign two of the following questions to each group. Each group should be provided 30 minutes to formulate a summary of their answers to each in preparation for open discussion. Once the class reconvenes, each group will share their thoughts and solutions to each of the questions assigned. For each response, the instructor will guide the discussion to keep it on topic and to ensure that most facets of what took place leading up to, during, and even after the scenario are discussed.

4. How could Jeff have better prepared his staff to respond to the broccoli shortage during service?

*Insight:*

Response provided above in Lesson 1 information

5. What is an appropriate best practice for responding to negative social media incidents?

*Insight:*

Contract foodservice companies, such as Cater-Fresh, often have established procedures for escalating any form of public relations emergency. This is usually handled by the Vice President of Communications or a similarly senior role. There are also tools and systems widely available for monitoring events of critical mass, allowing communication experts an opportunity to manage the situation as it is occurring. The first step is to activate this escalation and allow the experts to take the lead. In addition to this, executives from the operations team must also be engaged in order to notify the client and any other parties involved. An investigation team must be formed, and a thorough cause analysis must be completed.

6. How could a more engaging customer service approach have averted Mike from wanting to take a retaliatory response?

*Insight:*

Had a relationship been formed with the customer (Mike) before the incident, it is more likely he would have notified a Cater-Fresh employee in the cafeteria once he discovered the food issue. The absence of any customer service relationships created a situation where Mike was able to seek retribution via social media without an emotional connection to the foodservice team. Customer advocacy is a term used to describe engagement and relationship building between representatives from Cater-Fresh and Fleet Inc. that takes place outside of the foodservice area. The objective is to use qualitative data gathering for the purpose of identifying what is important to customers. This type of outreach both identifies areas for the foodservice team to focus on while fostering relationships. They are particularly useful when used to pursue research on areas of minority interest such as vegetarianism or cultural meal preferences. Mike and others could have easily been included in these focus groups, which would have established a relationship.

7. How had Jeff and Karen failed to recognize and respond to the underlying customer concerns that led to Mike feeling the way he did? What could have they done differently?

*Insight:*

One of the primary challenges associated with operating a small foodservice location is to ensure a wide variety of items, including those that appeal to customers with specific dietary preferences or restrictions. Establishing protocols and minimum daily assortments removes ambiguity from both the Cater-Fresh team and Fleet. These minimum commitments should be shared with customers and advertised in a way that promotes their availability. For instance, at a minimum, ensuring at least one complete vegetarian offering per day, based on a four-week menu rotation helps provide variety and enforces the commitment to the Cater-Fresh team and potential Fleet Inc. customers. Cater-Fresh will also find that this approach helps increase daily participation and sales, therefore providing benefit for the effort involved.

8. Do you think other concerns such as the feelings towards a poor environment contributed to the case issues? How can a team overcome an environment that has not been updated since the 1960's? Is this even possible?

*Insight:*

Yes, it is certainly possible to have contributed to the negative feelings of some employees. Although the dining experience may be negatively impacted by a dated physical environment, they can overcome this through outstanding customer service and consistently good food. Even though Cater-Fresh is generally not responsible for renovation for facilties, there could have been some better dialogue with the Fleet about the need to update this cafeteria facility. Despite this, Cater-Fresh employees could probably have added some simple décor items (pictures on the walls or table decorations) in an attempt to provide a more pleasing environment.

9. What is the best way to respond to Fleet's CEO to instill confidence that Cater-Fresh is still the best suited to operate the foodservice program, despite the recent incident?

*Insight:*

Cater-Fresh must engage their most senior leadership to communicate directly with Fleet's CEO and make a commitment to positive change. The purpose of the meeting is to begin the process of rebuilding trust and delivering high-level commitments such as increasing the variety to appeal to all populations, improving the quality assurance program resulting in a world class solution, and enhancing customer service to ensure an individualized approach. Collectively, these commitments will become the cornerstones of the improvements to the program.

### Follow-up Activity

For students to build upon the learnings from the case study, an additional activity is proposed that can be provided to students in order for them to complete a writing assignment (due at a later time). This writing assignment can build upon the small group lesson work and is focused on quality assurance, intended for both the graduate and undergraduate level with appropriate adjustments in scope and expectations. An additional 3-5 references should be included beyond the case study itself in order to respond to one of the following:

- Develop a training and auditing outline that supports sustainable quality assurance standards. Include possible solutions for conducting, tracking, and verifying audit compliance.

*Insight:*

There is a systemic issue with customer service and perhaps one with quality assurance. Cater-Fresh should develop an organization-wide protocol based on the concept of Total Quality Management (TQM). This process draws upon the disciplines inherent in process excellence and well-known solutions like Sig Sigma. The core element is continuous improvement and constant evaluation of existing state versus the desired state. The program includes all levels of associates and over time becomes a culture, not only a program.

### Additional Learning Activities

- Construct a social media control plan to reduce risks to the company in the event of disaster (man-made or natural)
- Create a retraining plan in regards to food safety for Jeff, Mary, and/or Rick (Cater-Fresh employees), before they are permitted back to work (and or reassigned). A retraining plan for Jeff may also be created based on supervision and other related managerial concepts.

## Analysis of Teaching Objectives

### Contract Foodservice

Contract foodservice providers are hired by employers to provide on-site dining amenities for their employees with the expectation that they bring with them the expertise to deliver a quality product that is always safe (Society for Hospitality and Foodservice Management, 2015). The Society for Hospitality and Foodservice Management (2015) also noted that the operating models are often scalable, ranging in size from small grab and go kiosks to full-service cafeterias. The larger scale cafeterias tend to model the hours that employees are working, which in the manufacturing environment can involve several shifts. On-site foodservices have always been linked to employee engagement and satisfaction, and although subsidies are less common causing higher market pricing within the cafeterias, modern employers continue to see the value it provides (Rosales, 2014). In turn, employee tastes and food trends have increased the expectations from paying customers.

This case highlights the often challenging position that contract foodservice providers face when priorities are not always aligned. Primary food and service quality need to be remembered in each situation and be the focus for hospitality employees (Bufquin et al., 2015). Senior client stakeholders are not always in step with the expectations of their employees, who are ultimately the primary customers in the cafeteria. In the absence of a financial subsidy or satisfactory investment in the infrastructure, disgruntled employees become motivated to seek a voice by whatever means they can. Students should recognize these variables and demonstrate the ability to be creative in finding solutions that deliver the best possible outcome for customers all of the time. It is important for students to understand the general dynamics of the foodservice industry given the obscurity it has unless you either work for a provider or an employer who utilizes one.

### *Quality Assurance & Training*

The single most important thing for any foodservice provider is the quality and safety of the food they are putting into customers' bodies (Cotterchio, Gunn, Coffill, Tormey, & Barry, 1998). A majority of reported cases involving customers who get sick from food are traced back to licensed businesses and eating establishments (Cotterchio et al., 1998). Regardless of whether an illness occurs or not, quality assurance must be a primary focus for any foodservice provider because the damage that can ensue from a bad experience can be equally devastating to their reputation. This case is an example of when skipping standard food preparation procedures can have a huge impact, even if no illness is involved. Incorrect or neglectful food handling practices lead to safety and security risks that cause lasting consequences for everyone involved (Cotterchio et al., 1998). Adhering to practical, standardized operating models has a high success rate, and when combined with training, can avert food safety issues associated with food production (Wodi & Mill, 1985). Contract foodservice providers have much at stake and to mitigate the risk of losing a contract must provide their teams with continuous training, requiring them to follow strict processes and prioritize customer safety as their primary concern (Park & Almanza, 2015; Yiannas, 2009).

### *Social Media*

Social media is nothing new in the food industry, whether the establishment is a hole-in-the-wall or a fine dining operation, social media can make or break a business based on their online reputation. The contract foodservice industry is a little different in that social media has not had such an impactful presence, until recently (Lautenschlager, 2006). Before social media existed anywhere; it used to be that one disgruntled customer told about ten people, which seemed dangerous at the time (Goodman & Newman, 2003). Corstjens and Umblijs (2012) explained that today one disgruntled customer could reach thousands, or even millions, in a single keystroke and the damage caused by negative social media significantly outweighs any positive contributions. As occurred in this case, the incident not only created a lot of negative publicity, it also put the entire contract at risk. The newfound outlet for the employee in this case study is an important reminder that even in a non-traditional situation like a manufacturing plant, social media can reach far and wide. Reputations and contracts are at stake as consumers' perceptions and comments can blur the lines between libel and slander, leading to serious business sustainability issues (Svantesson, 2009). Svantesson (2009) stated that to survive in the modern age, company owners and managers must develop strategies to understand both the nature of social media and human interest in sharing experiences digitally. Without understanding the trends taking place with social media, it becomes very difficult to mitigate the risks or to use the technology in a positive way.

### *Facility Condition*

One of the most common challenges that contract foodservice providers must navigate is operating in facilities that they neither own nor have the control to change. Often referred to as servicescapes, physical environments can have a significant impact on customers' perceptions of quality (Chua, Othman, Boo, Abkarim, & Ramachanddran, 2010). Chua, Othman, Boo, Abkarim, and Ramachanddran (2010) explained environments perceived as unfavorable negatively influence customers' psychological state and can trigger a heightened chance of dissatisfaction with the experience overall. When this is taken one step further, and unfavorable servicescapes are combined with the absence of favorable service, something like bug-infested broccoli can become an enormous issue (Chua et al., 2010). This case represents an example where the aging facility conditions, combined with other factors, may well have contributed to the outcome. Customers often become frustrated when their on-site dining experience is dated and dilapidated, leaving them feeling frustrated and undervalued. The foodservice providers are left in the middle when funding to refresh or remodel the space is not available. To help overcome this problem, some contract foodservice providers may offer up investment dollars earmarked for cafeteria updates assuming a return on the investment with increased participation. These investments create win-win situations, improved dining experience and long-term contracts that provide the foodservice provider with stability. Even in light of these considerations, students must recognize that regardless of the facility's condition, had the quality and consistency of the food itself been maintained, the retribution sought by the manufacturing employee would have been significantly reduced or even eliminated.

## Additional Instructor Information

### *Aftermath – Following the Case Ending*

The fallout from the string of events that followed the incident was excessive. Following the chaos of the event, Jeff, the cafeteria supervisor, quit without notice and Karen, the General Manager, was reassigned to another location. David, the Vice President, relocated her after further investigation revealed that systems and processes that should have been routinely followed were not and that there was a high degree of probability that this event was part of a more systemic issue. Two corporate quality assurance auditors, Chad and Patricia, were temporarily assigned to this location and remain in the environment fostering process improvements until permanent hires are made. Organizational changes were adopted, increasing the number of employees at the site by a total of 3 between all shifts. While this was not necessarily a requirement, Cater-Fresh wanted to demonstrate their commitment to continual improvement by bolstering the staffing levels and corporate oversight at their expense. Fleet placed the contractor on a performance improvement plan and considered this incident a material breach of contract. Cater-Fresh continues to make improvements, not just to the location in question, but the entire campus at a cost to the company that will impact the contract profitability for many years. While this situation was isolated, there have been occasional food issues in the past that have not attracted the attention that this one did. Fleet is concerned about their reputation, both with their employees and customers. They believe the actions they are taking are necessary to continue relations with both. Social media was the cornerstone of this situation and illustrates the potential negative impact it can have when things do not go as planned.

Foodservice is a dynamic business requiring people to make correct choices and the right decisions. Training must be ongoing, repetitive, and consistent, reinforcing the importance of food safety, quality, and customer care. Customer concerns must not only be heard but addressed, to ensure service levels meet expectations. Quality and safety must not come at the expense of fast service. This case presents an opportunity to discuss in further details the intricacies of training, overcoming environmental constraints, and most importantly how to respond to social media emergencies.

### *Management Summary*

Cater-Fresh aligned their systems and processes on serving customers fast, adopting this as a key service priority for their Fleet customers. As they quickly discovered, focusing on a single priority can create a system that is out of balance and prone to failure. In retrospect, they found out that there is no substitution for following systems and processes regardless of the situation at hand. Moving forward they must now establish a credible culture of discipline into their work environment, consisting of:

- Ensuring safe and wholesome food
- Creating an exceptional customer focused environment
- Developing a culture of continuous improvement
- Fostering ongoing training and development
- Maintaining rigid systems and processes that guarantee quality and consistency

Senior Cater-Fresh leadership, including onsite management, continue to work to improve service delivery at Fleet, and while this particular situation has since passed, the perceptions have not. They continue to face an uphill battle to instill a culture of excellence and a commitment to serving safe food and quality service all of the time.

## Additional Readings


Bowden-Everson, J. L., Dagger, T. S., & Elliott, G. (2013). Engaging customers for loyalty in the restaurant industry: The role of satisfaction, trust, and delight. Journal of Foodservice Business Research, 16, 52-75. doi:10.1080/15378020.2013.761025.

Cao, Y., & Kim. K. (2015). How do customers perceive service quality in differently structured fast food restaurnats. Journal of Hospitality Marketing & Management, 24, 99-117. doi:10.1080/19368623.2014.903817.

Corstjens, M., & Umblijs, A. (2012). The power of evil: The damage of negative social media strongly outweigh positive contributions. Journal of Advertising Research, 52(4), 433-450.

Cotterchio, M., & Gunn, J. (1998). Effect of a manager training program on sanitary conditions in restaurants. Public Health Reports, 113(4), 353-358.

Jin, N. (2015). Moderating role of relationship quality on the link between restaurant expereicnes and customer loyalty for the market of mature customers. Journal of Quality Assurance in Hospitality & Tourism, 16, 259-282. doi:10.1080.1528008X.2015.1013410.

Ro, H. (2015). Customer dissatisfaction responses to restaurant service failures: Insights into noncomplainers from a relational perspective. Journal of Hospitality Marketing & Management, 24, 435-456. doi:10.1080/19368623.2014.910481.

Society for Hospitality and Foodservice Management. (2015). SHFM Annual Benchmarking Study [Industry Annual Report]. Retrieved from http://shfm-online.org/resources/original-research.

Verma, R., Nitin, N., & Srivastava, A. (2016). On behavioural responses and different shades of flaming in social media and computer-mediated communication. International Journal of Human Capital and Information Technology Professionals, 7(4), 33-49.


## References


Chua, B. L., Othman, M., Boo, H. C., Abkarim, M. S., & Ramachandran, S. (2010). Servicescape failure and recovery strategy in the foodservice industry: The effect oncustomer repatronization. Journal of Quality Assurance in Hospitality & Tourism, 11(3), 179-198. doi:10.1080/1528008X.2010.483419.

Goodman, J., & Newman, S. (2003). Understand customer behavior and complaints. Quality Progress, 19(3), 1-5.

Lautenschlager, J. L. (2006). Food fight!: The battle over the American lunch in schools and the workplace.

Jefferson, N.C.: McFarland & Co.

Rosales, J. (2104, January 29). Aging school kitchens undermine healthy meal preparation. NEAToday.

Retrieved from http://neatoday.org/2014/01/29aging-school-kitchens-undrmine-healthy-meal-preparation/

Svantesson D. J. B. (2009). The right of reputation in the internet era. International Review of Law, Computers and Technology, 23(3), 169-177. doi:10.1080/13600860903262230.

Wodi, B. E., & Mill, R. A. (1985). A priority system model for sanitation management in food service establishments. American Journal of Public Health, 75(12), 1398-1401.

Yiannas, F. (2009). Food safety culture: Creating a behavior-based food safety management system (food microbiology and food safety series; food microbiology and food safety series). New York: Springer.

# INTERNATIONAL CHRIE
## would like to recognize our Premium Members

ACCOR • Ashford University • Bilkent University • Boston University • Bradley University FCS • Budapest Business School • California State Polytechnic University, Pomona • California State University, East Bay • Cesar Ritz Colleges Switzerland • CETT-UB • Cornell University • Cphbusiness • Culinary Institute of America • Cvent • Cyprus University of Technology • DePaul University • Delaware State University • Drexel University • Dublin University of Technology • Dusit Thani College • Ecole Superieure Internationale de Savignac, France • Endicott College • ESDAI de la Universidad Panamerica • Fairleigh Dickinson University • FERRANDI Paris • Florida Atlantic University • Florida Gulf Coast University • Florida State University • Free University of Bolzano • Georgia State University • Glion Institute of Higher Education • HAAGA-HELIA University of Applied Sciences • Indiana University - Purdue University Fort Wayne • Indiana University of Pennsylvania • Institut Paul Bocuse • International University Of Applied Sciences Bad Honnef * Bonn • Iowa State University • James Madison University • Johnson & Wales University, Charlotte • Johnson & Wales University, Denver • Johnson & Wales University, North Miami • Johnson & Wales University, Providence • Kansas State University • Kendall College • Knowledge Matters, Inc. • Lamar University • Lasell College • Lillebaelt Academy of Professional Higher Learning • Mae Fah Luang University • Management & Science University • Manchester Metropolitan University • Metropolitan State University of Denver • Michigan State University • Missouri State University • Montclair State University • Nankai University College of Tourism & Service Management • National Kaohsiung University of Hospitality & Tourism • National Restaurant Association Solutions LLC • New Mexico State University • NHTV Breda University of Applied Sciences • Niagara University • North Carolina Central University • Oklahoma State University • Oxford Brookes University • Ozyegin University • Purdue University, West Lafayette • RIT Croatia • Rochester Institute of Technology—Dubrovnik • Rochester Institute of Technology—Rochester • Roosevelt University • Russell Partnership Technology • Ryerson University • San Diego State University • Saxion University of Applied Sciences • SHMS Swiss Hotel Management School • South Dakota State University • St. Cloud State University • STR SHARE Center • Strathmore University • Taylor's University, Malaysia • Temple University • Texas Tech University • The Emirates Academy of Hospitality Management • The Hong Kong Polytechnic University • The Pennsylvania State University • The Private Hotel School • The University of MIssissippi • The University of Alabama • Universidad San Ignacio de Loyola SA • Universiti Teknologi MARA • University College of Northern Denmark • University of Arkansas, Fayetteville • University of Central Florida • University of Delaware • University of Hawaii at Manoa • University of Houston • University of Macau • University of Maryland, Eastern Shore • University of Massachusetts, Amherst • University of Memphis • University of Missouri, Columbia • University of Nebraska - Lincoln • University of Nevada, Las Vegas • University of New Hampshire • University of New Orleans • University of North Texas • University of South Carolina • University of Surrey • University of the Philippines • Virginia Polytechnic Institute and State University • Virginia State University • Washington State University • Widener University • York College of Pennsylvania • ZUYD Hogeschool

# Journal and Case Study Competition Submission Information

**The ICHRIE Johnson & Wales Case Study Competition and Publication Series is an annual initiative of ICHRIE that aims to:**

- enhance the ICHRIE services and benefits to its membership
- create a new publication outlet of ICHRIE provide a new way of ICHRIE and its members to participate in the advancement of hospitality & tourism education
- foster and strengthen the communication between academia and industry within tourism and hospitality
- establish ICHRIE as a valuable source for hospitality & tourism educational material
- reinforce the role of ICHRIE as a communication hub and facilitator of knowledge exchanges between research, academia and industry in hospitality & tourism.

**Worthy case studies submitted to the competition are peer-reviewed and considered for publication in ICHRIE's newly established electronic journal titled, Journal of Hospitality & Tourism Cases. This e-journal is a peer-reviewed international academic journal that aims to fill in the publication gap for case studies in tourism and hospitality. Case studies provide innovative ideas, business (best) practices, professional dilemmas, and lessons learned from the tourism and hospitality reality. Hence, cases are an invaluable source of knowledge for educators, professionals and researchers alike.**

**In this vein, the Journal of Hospitality & Tourism Cases is the first peer-reviewed publication in tourism that aims to act as:**

- a clearinghouse providing educators with valuable case studies to enrich their educational and instruction methods;
- an internationally recognized publication outlet offering researchers the opportunity to publish their research work;
- a new benefit for ICHRIE members;
- an additional important contribution of ICHRIE to hospitality & tourism education and research.

***Topics & Subject Areas of the Case Studies***

**Cases studies from the tourism and/or hospitality industry are invited that feature a business situation and topic falling within any of the following (but not limited) subject areas:**

- Finance & Accounting
- Strategic Management
- Sustainability
- Human Resource Management
- Marketing
- Information & Communication Technologies
- E-Business & E-Commerce
- Information Systems
- Knowledge Management
- Operations
- Services Management
- Law
- Geography of tourism/hospitality
- Sociology of tourism/hospitality
- History of tourism/hospitality
- Tourism Development
- Policy Making
- Destination Management
- Networking – Cooperation
- Service Quality
- Experience Management
- Revenue Management
- Events & Sports Management
- Gaming
- Leisure Management

**The Journal of Hospitality & Tourism Cases is published annually since 2011. Each journal volume features up to 4 issues, including case studies and teaching notes, that represent a wide variety of business topics/problems, disciplinary areas and various types of organizations from the travel, tourism, and hospitality sectors.**

**All case studies submitted to the ICHRIE Johnson & Wales Case Study Competition and JHTC are double-blind reviewed by three reviewers.**

**For more information or questions about the journal and its submission guidelines, please visit the website of JHTC at http://www.chrie.org/publications/jhtc/index.aspx or contact:**

Professor Marianna Sigala
Editor, *Journal of Hospitality and Tourism Cases*
marianna.sigala@unisa.edu.au