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The importance of environmental scanning: a study on the Brazilian hotel industry

Companies need systematic listening practices in the competitive environment to observe competitors and help managers in the decision-making process. Thus, the objective of this article is to analyze the strategies of the Brazilian hotel industry from the clients' perception of the quality of accommodation services. This research is also described as a mixed-method centered around delimiting the existing strategic information in hotels based on the 2017 JLL's Hotels & Hospitality Group report. Data were collected from the guests through on-site and online questionnaires and interpreted qualitatively based on the hotel chain's missions and views, and statistically from the two-way ANOVA and Tukey tests, which presented a low significance for the guests' educational training, income, and age. The objectives proposed in the hotels' strategic outline concerning the practices adopted and the experiences undergone by their guests showed some inconsistency. Hotels lack the identification of important sources of existing information in their area.

Keywords: Brazilian hotel industry; accommodation excellence and quality; competitive intelligence; prospective information.

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Introduction

Organizations are seeking to enter into a "blue ocean" to maximize opportunities and minimize threats by targeting promising markets and causing competition to become irrelevant (Chan Kim & Mauborgne, 2018; Leavy, 2018). The need to understand the competitive environment in detail and anticipate changes becomes imperative, which justifies an independent budget. After all, in order to face more intense and fierce competition and to define actions aimed at good decision-making processes, systematic practices of external environment surveillance have become key in the dispute or rise of companies that operate in the business

world (Toit, 2016; Robinson & Simmons, 2018). This is because only dynamic companies have a chance to succeed.

In this context, competitive intelligence (CI) emerges as a way to act and think (Levet, 2001, p. VII). Therefore, it presents itself as an organization's support and strategic development (Vasconcelos *et al.*, 2019). For such, it uses its mechanisms of orientation, planning, information capture, and analyses close to its area of interest and its current activities. This allows the company to avoid a competitors' crowd, that is, to be prepared to anticipate actions that comply with the market's unpredictability and possibilities.

Concerning the methods adopted for information research, there is the environmental scanning or environmental monitoring or, still, scanning of environmental information, an observation technique similar to a "radar of persecution, that is, a strategy focused on the object to analyze and on which it concentrates all its force" (Martinet & Marti, 1995, p. 29). The authors intend to establish a strategic value correlation between the competitive intelligence system and the surveillance system, which are also classified as "surveillance radar," whose objective is to be attentive to current and potential competitors' movements to avoid competition. Also, wherever it comes from, an unknown event is detected beforehand, a premise of competitive intelligence when the observation system, or surveillance system, is activated. Moreover, adopting an economic intelligence approach does not imply the retention of information as a privileged way to gain power and main competitiveness vector, but the sharing of cognitive resources.

In fact, monitoring the environment where the firm is inserted is considered as a capture technique of information prospective and analysis of the organizations' external and internal environments. This observation allows us to understand external factors, including social actors,

which influence the company's activities, such as customers, suppliers, competitors, and political, economic, legal, technological, and demographic aspects (Yap *et al.*, 2013). Internal factors become a rich source of information about the external environment and not only an internal source of internal use (Vasconcelos & El-Aouar, 2015).

Taking this into account, organizations aim to be attentive to the clients' needs and satisfactions. In fact, they have been looking for measurement alternatives that anticipate customer satisfaction regarding the sale of a product or service. It should be noted that satisfaction is strongly related to loyalty since a happy customer reassures their purchases and services in their preferred places (Biscaia *et al.*, 2017).

In Brazil, one of the areas demanding intense discussions on the subject is the hotel sector. Despite being considered a promising branch, according to 2017/2018 South American Hotel Panorama, the hotels established in the country have been experiencing turbulent moments and a slight performance decline. Thus, to obtain a competitive differential, this type of activity has invested in the quality of service practices (Araújo, 2013) by using satisfaction surveys to follow up on the results obtained.

Tontini & Zanchett (2010) and Kumarasinghe, Lee & Karunasekara (2018) state that these investigation tools are characterized for measuring attributes that positively influence customer satisfaction and respect, enabling companies to analyze the environment where they perform permanently. Furthermore, the satisfaction survey allows understanding the experience lived by the individual by listing positive and negative aspects of life (Castillo Canalejo, 2018; Dinh Phi, Phan Thanh & Nguyen Viet, 2018). This evaluation can contribute to insert new practices based on the satisfaction criteria defined by the clients themselves. Based on this assumption, the following research problem arises: how are the hotels established in Brazil

monitoring their customers' satisfaction? As the focus around Brazilian hotels, there is the need to know if what is established in their organizational identity (mission and view) is what they practice and if the guests in their daily activities notice this action.

As an objective, this research aims to analyze the strategies of hotels located in Brazil, and it concerns the follow-up on the customers' satisfaction about the quality of the accommodation services offered. For such, an investigation on the missions and visions of such hotels was performed by delimiting the guests' profile and evaluating their clients' perception concerning the importance of the research tools as an alternative for the internal and external information surveillance, which is a basic input to the development of the end activities. This way, a comparison was made concerning the strategic guidance from the hotel chains located in Brazil to the clients' perception about the experience lived during their stay.

Therefore, this study is justified both academically for the researchers and technically for the remaining professionals since it tries to understand the strategic direction of the hotel chains located in Brazil and the possible results obtained based on the clients' perception. Identifying the main differences or relationships between what hotels aspire to and what they achieve was also a purpose in this study.

In addition to this introductory section, this article is structured with a theoretical framework that addresses the following topics: an analysis of the competitive environment in the hotel sector. Furthermore, the methodology was presented based on the hotel chain's missions, views, and statistical tests suggested for the study to accomplish its objective. Subsequently, the results are presented, and, finally, the final remarks.

Theoretical grounding

An analysis of the competitive environment

Companies have been trying to insert competitive intelligence practices into their activities more and more. Although many call it a field to be discovered and still under development, the study by Calof & Wright (2008) set the origin of CI at about 2,400 years ago, using Sun Tzu approaches, which initially stated that the basis of the activities consisted of the assiduous investigation of competitors' actions, which is nowadays seen as "industrial spying."

Competitive intelligence was characterized as a sweep in the external environment in the search for information that is useful to the organization, unlike business intelligence, in which the scanning takes place in the internal environment. On this topic, Robinson & Simmons (2018) wonder why one source may be preferred over another if different scanning modes can complement each other. Alnoukari & Hanano (2017) state that it is important to integrate these two bits of intelligence to formulate the corporate mission, objectives, strategies, and long-term policies for leading organizations.

The term environmental scanning was proposed in the late 1960s (Zhang *et al.*, 2011) and is regarded as the search, acquisition, and use of information about the company's external environment that assists in strategic planning (Choo, 2001). Environmental scanning or sweeping is the first step in the organizational strategy process (Karami, 2008), as it guides organizations to deal with environmental uncertainties and formulates adaptive strategies (Zhang *et al.*, 2011). Researches by Lau *et al.* (2012) confirm that online scanning provides opportunities to seize web intelligence, with a large number of data on social-cultural, political, and economic issues available on the internet. There are also studies by Mani & Chouk (2018) and Townsend *et al.* (2018), which show how the increasing availability of various technologies to monitor the

organizational environment in real-time through recent advances, such as the Internet of Things (IoT), with specific emphasis on Radio Frequency Identification (RFID) and associated sensor networks, can guarantee value to competitive intelligence as a practice of institutional development (Bekaddour, 2018), since, through this high technology, hotels can observe their clients' actions about the quality of the accommodation services offered in real-time.

Calof & Wright (2008) show that 87% of large companies hold intelligence ability by collecting and analyzing information about the external environment, even if it is constantly renewed. Seen as a specific resource of successful organizations, information collected online assists in organizational strategic alignment based on environmental requirements (Karami, 2008; Cancellier *et al.*, 2014).

Thus, through environmental monitoring in the competitive environment, the firm can view and delimit the relevant information around it (Choo, 2001), and that used to be inaccessible. Seeing the environment contributes to the company's performance as an open system, in which the search for pertinent information helps with internal structure settings and allows better responses to market changes (Cancellier *et al.*, 2014). In addition, surveillance helps to delimit opportunities and to acquire knowledge so that the institution can intervene and achieve the desired competitive advantage (Choo, 2001).

Companies need to acquire, analyze and understand information about the current environment and its possible changes (Haase & Franco, 2011) by adapting to the transformations that may take place (Choo, 2001). In addition, it is possible to see that firms can fail for not responding quickly to the transitions that take place in the organizational environment (Zhang *et al.*, 2011) and that the adaptability of a company to its external environment depends on the

competitive environment observation since it aims at knowing and interpreting the changes that take place in its exterior (Karami, 2008).

Therefore, in order to improve the competitive environmental analysis, the institution must keep in touch with important actors of the environment in which it is inserted, capture more information about their customers, suppliers, and competitors, and encourage their team to become interested in and discuss what is happening in the external environment (Choo, 2001; Townsend *et al.*, 2018). As important sources of information, there are the formal and informal personal sources and impersonal sources that are consultations to written materials (Cancellier *et al.*, 2014).

Most firms face an environment with rapid and unpredictable changes, making it difficult to assess the overall environment and the effects caused by such changes (Ford *et al.*, 2013). According to Haase & Franco (2011), changes in the business environment may happen because of the increased competition due to globalization, the consumer's different attitudes and behavior, the increase in the rate of innovation, and new regulations laws, among others. Concerning the external variables that affect the company and shape the market directly or indirectly, there are economic, environmental, political, social, and cultural aspects (Toivonen & Vitanen, 2016). To scan the environment, the company depends on external factors, such as turbulence or environmental change, perceived uncertainties, and dependence on resources (Choo, 2001).

The study by Cancellier *et al.* (2014) performs a verification of the correlation between the surveilled environment and the strategies adopted by companies, knowing that information mining is more related to the organizational performance than to the strategy adopted by the organization. Choo (2001) presents a model that specifies two conditions that influence scanning

in companies: environmental analysis by environmental volatility and organizational invasion due to its complexity and rapidity in scenario changes. Thus, the author points out the importance of adopting this model in organizations to encourage their members to examine the environment in an anticipatory way.

Karami (2008) sought to know the relationship between the increase of practices related to environmental scanning and the success of the company's performance, finding that the first one is directly related to the second one, with monitoring being the basis of strategic planning. Haase & Franco (2011) used ways to improve knowledge about environmental monitoring based on the analysis of the influence of the sector and the size of the organization for the use of external sources of information. Their findings show that the most used information sources are customers and suppliers, and the internet, and specialized publications. The use of these does not vary regardless of sector or company size. The study pointed out that the information's degree of accessibility is a determining factor in the choice of source that the organization can use in the environmental scan.

Zhang *et al.* (2011), in turn, explore the relationship between environmental uncertainty, environmental scanning, and organizational performance. The results show that environmental sweeping helps the company develop and plan its business to improve its performance and competitiveness (Zhang *et al.*, 2011; Yin, 2018). Dong *et al.* (2016). On the other hand, they analyze market orientation as a process by relating the generation of intelligence, dissemination, and responsiveness.

Studies by Toit (2016) and Robinson & Simmons (2018) have shown that it is not easy to conduct environmental scanning because there are several channels through which information is collected and many variables. Besides, the information available is disorganized, fragmented,

and demarcated. It was also observed that, besides knowing different languages, the person responsible for the environmental scanning in a company should have technical knowledge of forecasting, writing of scenarios, and analysis of the alternative impacts. Therefore, effective strategic management requires planned extracted information, whether simultaneously or not, from the internal and external environment, and the knowledge obtained can be used to find a lasting competitive advantage (Shujahat *et al.*, 2017; Yin, 2018).

In short, the studies presented so far pointed out the companies' importance of observing their environments closely. They also showed that these companies must frequently investigate their clients, suppliers, and competitors' actions to acquire new knowledge to outline their strategic actions.

Environmental scanning in the Brazilian hotel industry

The tourism sector has become one of the most important sectors worldwide in recent years (Costa *et al.*, 2016b). The World Tourism Organization (2016, 2017) points out that tourism is an activity in a continuous and diverse expansion that stands out every year for its uninterrupted growth. However, nowadays, the activity has been experiencing great concern in the development of its practices. Studies point out that growth opportunities are increasingly complex and challenging (Richard, 2017; Pratt & Tolkach, 2018).

Viewed as a segment with strong competition, tourist practices always need to be vigilant and reshape their actions in advance. In this respect, knowledge is considered the necessary tool to achieve and ensure a competitive advantage (Costa *et al.*, 2016a). Current and predicted transformations with the use of technologies (Kerr & Phaal, 2018) aim to bring significant changes to the hotel sector (Tuominen & Ascenção, 2016). Thus, in order to be able to adapt, hotels will need to use the knowledge available from external partners (Richard, 2017) through

competitive intelligence systems in order to extract the necessary knowledge about the competitors' opportunities and threats (Alnoukari & Hanano, 2017), turning the latter one into new opportunities. It is noticed that CI has been expanding its actions and becoming key in the strategic management and support for the sector's business strategies.

Studies by Costa *et al.* (2016b) and Pratt & Tolkach (2018) present a brief context to examine the main trends of world tourism and their possible impacts on the sector. Through them, it was possible to identify the destinations of the tourists and their different reasons for traveling, such as business, events (fairs, congresses, convention), leisure and entertainment, studies, visits to relatives and friends, and health (treatment and aesthetics), among others. Their characteristics show that the travelers' diversification and profile are constantly changing, besides the fact that they seek information to make their choices. Costa *et al.* (2016b) and Pratt & Tolkach (2018) suggest a barometer of tourism (BoT) that is considered a tool for environmental scanning. Launched in 2006, it analyzes the tourism and hotel sector from the perspective of senior professionals and public and private decision-makers. It is seen as a tool to identify hotel and tourism trends. The forecasts made by the tool are important for tourism decision-makers in order to anticipate behaviors and meet the guests' future demands and expectations (Costa *et al.*, 2016a).

Hotels have been gaining prominence in world tourism. Defined as plural organizations, they are characterized by the union of hotels in a specific network to reach the competitive market of increasingly diversified demands (Brookes & Roper, 2012). Ivanov & Ivanova (2016) point out that these TNCs (transnational tourism corporations) enhance the international connectivity between individuals, companies, and institutions by engaging the international market of goods, services, capital, and people. In addition, creating these bonds brings benefits

related to brand evidence, development of economies of scale, and evolution in financial performance (Holmeson & Revaz, 2006; Mattila *et al.*, 2009; Hanson *et al.*, 2018).

Richard (2017) points out that he sought to understand the future of hotel chains by analyzing guest expectations, potential innovations, emerging opportunities, and possible future scenarios. In his findings, he stated that hotel chains would only seize opportunities with long-term planning. To do so, hotels must seek strategies that help them better understand customers, consumers, and markets. They should also consider that the middle class is growing in emerging countries, like Brazil, requiring restructuring to accommodate guests with increasingly different profiles.

Tuominen & Ascenção (2016) point out future scenarios for hotels resulting from social and technological changes, such as transforming lifestyles, changes in the hotel environment, and development in consumer and service technologies. They suggest that future hotels should respond to demographic trends such as the aging of baby boomers and the development of new offers for a more mature consumer, one who is demanding and eager for good services and facilities. It is emphasized that hotels should adopt emerging technologies already available in other industry sectors or hyper-connected technologies to improve the relationship with users. Future hotels should also be prepared for the individualization of offers. The authors conclude that tomorrow's hotel should provide a more immersive experience, based on the support of technology and that they should be flexible enough to meet their guests' needs or even personalized solutions.

Methodology

The purpose of this study was to analyze the strategies of hotels located in Brazil regarding the monitoring of clients over the quality of hosting services. For such, the missions

and visions of these hotels were investigated by delimiting the guests' profile and assessing their perceptions regarding the importance of having research tools as an alternative for the monitoring of external information turned to unknown markets. In other words, the "blue ocean" strategy, in contrast to the existing current sectors, or the prevailing red oceans' model (Chan Kim & Mauborgne, 2018; Leavy, 2018).

From a qualitative and quantitative perspective, this research on mixed methods was initially based on JLL's Hotels & Hospitality Group's "Hospitality in Numbers 2017" report to delimit the strategic information of the hotel chains located in Brazil. In this study, the ranking of the 50 largest hotel chains was presented based on the number of hotels and rooms that the networks have in the country. After this survey, a spreadsheet was built with the information about missions and visions present on the websites of the hotel networks – an opportunity in which 50 sites were analyzed, and 21 of which did not present any relevant information. Then, a questionnaire was applied. It encompassed 20 closed-ended questions, made available through face-to-face forms or the Google Drive access platform distributed via social networks. The issues included subjects related to social-demographic profile, characteristics of the guest profile, identification of participation in satisfaction surveys, and evaluation of the importance of information monitoring for the hotel segment. During the process of completing the questionnaire, there were key questions, considered filters, which were inserted to be filled in according to the respondents' profile. The first question defined the individual's participation based on the experience of staying in Brazilian hotels in the last two years. In general, 243 respondents participated. However, with a guest profile, the main reason for the trip was leisure and entertainment. The sample comprised 166 subjects, a total that is considered meaningful for a population that is not used to answering research questionnaires. However, Ilieva *et al.* (2002)

and Evans & Mathus (2018) emphasize that online researches tend to increase since it is more frequently used and more accepted by Internet users. A questionnaire pre-test, a "pilot test," was conducted with twelve clients from a traditional travel agency in Natal, Brazil, aimed at checking the understanding of the questions and possible difficulties in answering the questionnaire. On the occasion, improvement suggestions and opinions were requested to improve the research tool. With the pre-test return, it was possible to see that the questions were easily understood and presented few changing indications.

Data analysis was divided into two phases. The first one concerned the use of the Atlas IT software, version 8.0. Based on the missions and visions of the hotel chains analyzed, the keywords that showed frequency and correlation were identified. These words delimited the strategic positioning of hotel chains concerning their objectives. The second phase comprised statistical analysis of the questionnaire data. Inferential statistics were used to compose the analyses by using the SPSS Statistics software, version 24. In order to investigate the correlations, the following procedures were performed: i) two-way ANOVA that examined the influence of two independent and different categorical variables; ii) Tukey *post-hoc* test, which identified the location of significant differentials involving the simultaneous evaluation of interval safety estimates of the differences between the means of the groups, as described by Marôco (2011). The Tukey test strategy concerns the definition of the smallest significant difference and, for such, the effects with a p-value $\leq$ 0.05 were considered statistically significant. ANOVA was used to check whether there were differences in the answers according to the respondents' school level, income, and age. The Tukey test was used to analyze the significant differences found.

The following hypotheses were raised for this investigation:

H1: People with a higher level of education took part of satisfaction surveys in hotels.

H2: People with higher income took part of satisfaction surveys in hotels.

H3: Older people took part of satisfaction surveys in hotels.

Hair Jr. *et al.* (2010) state that ten respondents are needed for each question to represent the population. As there are eleven questions considered for the statistical analysis, the population would be represented by 110 respondents. This research, however, had the participation of 156 people who answered the questions.

Results

Qualitative analysis of hotel strategies

Based on the analysis of the missions and visions of the 50 largest hotel chains, and according to the "Hospitality in Numbers - Brazil 2017", it was possible to delimit the strategic directions that the hotels seek to achieve in the competitive environment. According to Choo (2001), the actors present in the organizational environment refer to clients, suppliers, competitors, and staff. Thus, based on the analysis carried out using the Atlas TI software, the actors that the hotels specified in their missions and visions made available on their sites were identified. In addition, the occurrence of some keywords considered useful for the design of the organization's strategy was highlighted.

Chart 1 presents the keywords' occurrence ranking in the missions and visions of the Brazilian hotel chains. This chart shows the keywords that appear the most in the hotels' missions and visions and whose objective is to check the strategic focus of this activity sector through these words. Out of the 50 missions and visions analyzed, the word "excellence" stood out in the texts, with nine hits, followed by the terms "quality" and "hospitality," with seven and

six hits, respectively. "Excellence" is the strategic focus of 9 out of the 50 missions and visions analyzed.

Chart 1: Occurrence of keywords in missions and visions of Brazilian hotel chains
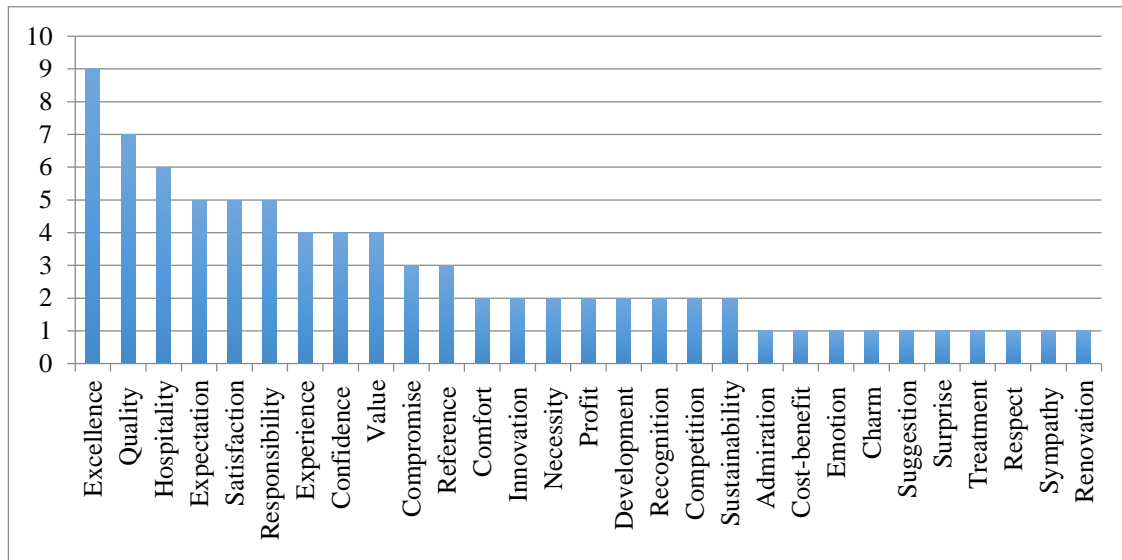
Source: Research data

In order to identify the actors of the organizational environment that hotels report in their publications, it became necessary to add the term "shareholder" as a relevant term, although Choo (2001) does not link it as such. This is justified by the incidence in the occurrences addressed in this study.

As for the actors of the organizational environment mentioned in the missions and visions of Brazilian hotel chains, the word "client" appears to be of great concern in the strategic directions of the hotels, with 24 hits, the other terms related to the actors refer to "team" and "shareholders," with a moderate difference between them, 15 and 14 hits, respectively. It is emphasized that "competitor" was the word of least incidence, appearing only on three occasions.

Regarding the role of the keywords identified in the strategic directions of hotel chains concerning the actors in the organizational environment, this showed that most of them were

associated with "client," 14 times; 1 time to "shareholder"; 8 times to "team," and six times to "competitor." However, this result was specifically anticipated since most of the missions and visions addressed the objectives and the actions of impact turned directly to clients.

This topic sought to present information about the main aspects and actors that the hotel chains seek to lead their strategies. Although it seems a presaged and common-sense result, the analysis of occurrences of the keywords is presented as a justification for the choice of the theme of the present research and confirms the results that will be presented below since understanding the clients' satisfaction becomes a nonissue for the smooth development of hotel strategies.

Quantitative analysis of satisfaction research

The study includes analyzing the strategies of the Brazilian hotel industry based on the monitoring of clients' perceptions about hosting services. In general, the study had 243 respondents, of which only 166 were eligible to take part. The profile of the qualified respondents is characterized by the experience of lodging in Brazilian hotels in the last two years and having "leisure and entertainment" as a predominant reason for traveling. Thus, 77 people answered negatively and omitted their responses, including the social-economic profile, resulting in 166 people who answered the entire questionnaire positively, that is, 68.31% of the total respondents.

According to the analysis, it was possible to identify that of the 166 respondents, 50% are male and 50% are female. In relation to the age group, most of them are between 30 and 45 years old (42.8%). The remainder aged between 18 and 29 years (35.5%) and the others, over 60 years (2.4%). Concerning income distribution, 36.7% earn six times more than the minimum wage (the Brazilian minimum wage sums up to around US$ 257 a month). There was no significant difference in groups that earn between 2 and 3 salaries and those with 4 to 5 minimum salaries,

with 26.5% and 23.5%, respectively. Regarding academic education, 34.9% have a postgraduate degree, 30.1% have incomplete higher education, and 22.9% have completed higher education. The sample, thus, has a high level of education since barely 12% has finished high school only. Most of the respondents, 89.8%, reside in the Northeastern region, while the rest come from other Brazilian regions.

The second stage of the questionnaire presented questions related to the characterization of guest profiles. Initially, the object was to understand the frequency of lodging in Brazilian hotels in the last two years, the main regions, guest profile, and reason for traveling. Regarding the frequency, 47% of the sample stated that they stayed between 2 and 3 times in the last two years, all related to leisure and entertainment. The other options have a non-significant percentage variation, 17.5% for once and more than five times, and 18.1% between 4 and 5 times, also related to leisure and entertainment.

The main regions of Brazil in which the respondents stayed refer to the Northeast. In this question, it was possible to choose multiple regions. However, due to their tourist peculiarities, 36.2% marked only the Northeast region, 7% marked the Northeast and the Southeast regions, and 6.6% marked the Northeast and the South. Regions such as North and Mid-West had few occurrences. Regarding the lodging profile, 67.5% were primary guests, and 32.5% were companions. It should be emphasized that the definition of primary guest includes the individuals who are responsible for administrative procedures during the lodging, such as pre-booking, registration, check-in, and check-out.

The third phase of the questionnaire pointed to questions related to the satisfaction survey, the participation of the guest, and the monitoring of the completion of this data collection tool. Regarding satisfaction surveys in hotels, 52.4% said that sometimes the hotel provided this

systematic monitoring, 26.5% indicate that such surveys were never presented to them, and 20.5% indicate that there have always been satisfaction surveys in the hotels where they stayed. The construct concerning "sometimes" demonstrates the existence of surveys in some hotels where the respondents stayed, but not in all of them. The percentage referring to the non-existence of satisfaction survey in hotels demonstrates the lack of interest in finding out the guest's opinion about the services offered.

When the respondents answered that there was no satisfaction survey in the hotels where they stayed, they were automatically sent to another question that addressed the participation in satisfaction surveys on hosting sites such as Booking, Decolar, CVC, Trivago, Trip Advisor, and others. Respondents stated that the hotels that presented satisfaction surveys had a participation rate of 59% of the sample, and 41% did not participate.

In the questionnaire applied, the respondents who pointed out their participation in and the existence of satisfaction surveys were referred to the following questions, which characterized the types and forms of the tools used. In general, the tool was applied to 86% of the sample through face-to-face forms and 14% by an electronic questionnaire. Regarding the participation of the surveys in agencies' websites, 34.8% said they participated, and 65.2% said they never participated. The next question was about the request and monitoring of the hotel in the participation of the satisfaction survey during lodging, with 70% stating that it was not requested, while only 30% said otherwise. The high percentage of non-participation can characterize several factors, one of them being the lack of interest of the guests in giving their opinion about experiences in the hotels that they attend and the lack of incentive on the part of the employees in charge of the hotel segment upon mentioning the existence of such tool.

Regarding the main areas that the satisfaction surveys contemplate, the respondents

pointed the following as main areas: service, room, cleaning, comfort, breakfast, and room service/restaurant, among others. All the options were pointed out by 9.1% of the respondents, and the other occurrences showed little variation. In response to the question about returning to the hotel, after completing the research tool, 57.6% stated that they would stay again, and 42.4% said they would not return. However, the respondents were not questioned about their reasons for not returning to the hotel.

Satisfaction survey in hotels contributes to understanding the individual's experience during lodging and the outline of aspects that can be improved. However, 84.7% of the respondents stated that the hotel never contacted them for possible acknowledgments for participation in the research tool. It is noticed that the lack of feedback to the respondents can lead to a lack of motivation in responding to future research.

The last step of the questionnaire comprised questions of agreement levels related to the importance of the guests' opinion, ways of obtaining a competitive advantage, and the need to invest in new information scanning methods. Initially, the objective was to understand the importance of guests' opinions about accommodation to identify possible demands and influence the insertion of improvements to the hotel as a whole. About 59.3% of the respondents fully agree, and 32.2% only agree. The rest of the sample remained neutral regarding the statement.

The results show that 55.2% of the respondents believe that monitoring clients' opinions about the services provided during hosting can influence the advantage over the competition; only 34.5% agree. However, almost all the respondents show that one way or another, they can contribute to the Brazilian hotel chain to find its "blue ocean." These agreements show that the clients realize that they can contribute to hotel improvements and that their opinions are critical. Regarding the need for hotels to invest in new ways of monitoring customer perception, 40.7%

of the respondents say that they fully agree, 50.8% agree, and 8.5% remained neutral and did not present any agreement or disagreement.

In order to determine the correlation between all the variables, the bivariate correlations were calculated through ANOVA. It was observed that only the question related to the guest's profile, as a full or companion guest, did not present any statistical significance, with a value of 0.007, once the p-value ≤ 0.05 was defined as significant. The other variables, however, were significant.

Furthermore, the significance of the variables related to social-economic profile was checked: education, income, and age group were verified through ANOVA. Based on the correlation between the respondent's training and the answers presented, it was confirmed that the question regarding the participation in satisfaction surveys on lodging in agencies' websites such as Booking, Decolar, Trivago, CVC, Trip Advisor, etc., had a low significance with an approximate rate of 7% (Table 01). It can be stated that people with a higher education level actively participate in satisfaction surveys on agencies' websites and that people with training simply do not participate, which confirms this research's hypothesis 1. The statement that presented a higher significance rate, with 80.6%, in relation to training, was the one related to guests' profile, which pointed out that respondents with a higher level of education are the ones who stayed like primary guests.

Table 01 - ANOVA of the correlation between the statements and the respondents'

education, income, and age range.

	EDUCATION	INCOME	AGE RANGE
At the Brazilian hotel(s) where you stayed, was there any kind of satisfaction survey?	0.036	0.837	0.136
In what way was the satisfaction survey carried out?	0.432	0.159	0.790
Did you take part in the satisfaction survey?	0.490	0.925	0.777
At some point during your stay, were you asked to take part in the survey?	0.367	0.419	0.589
Have you ever taken part in satisfaction surveys about your accommodation in agencies' websites, such as Booking, Trip, Trivago, CVC, Trip Advisor, etc.?	0.007	0.120	0.021
After completing the survey, did the hotel(s) contact you for possible acknowledgments?	0.262	0.598	0.277
Did you stay at the hotel(s) where you took part in the satisfaction survey more than once?	0.297	0.618	0.096
In my opinion, the hotel's interest in the guests' opinions can contribute to improvements in the segment.	0.122	0.742	0.014
Monitoring customers' opinions about the services provided during hosting can help the hotel to gain advantages over competition.	0.238	0.066	0.047
Brazilian hotels need to invest in new ways of monitoring customers' opinions.	0.451	0.402	0.195
In most of your accommodations, what was your profile?	0.806	0.007	0.047

Source: Research data

Regarding income, the variable concerning guest's profile presented a low significance rate, around 7%, which means that it cannot be stated that people with higher incomes are the primary guests. The highest significance occurred in the correlation between income and participation in satisfaction surveys (Table 01). With a percentage of 92.5%, it was possible to see that the respondents who took part in satisfaction surveys are the ones with the highest income, which confirms hypothesis 2.

Considering the age range, it is evident that the lower significance level is related to a statement about the guests' opinion on the contribution of improvements, with 1.4%, showing that it cannot be stated that older guests are those who agreed (Table 01). The statement about the satisfaction survey presented the best correlation, with a rate of 79%, showing that older guests are the ones who most take part in satisfaction surveys, as long as they are physically present at the moment of check-out, which confirms hypothesis 3.

Overall, the results achieved are a validation of what has been achieved through a review of specialized literature, and also by identifying regular keywords in the missions and visions of the hotel chains that guide the strategic positioning of the institutions under analysis, plus the statistical treatment stimulated by data obtained through the application of questionnaires made available via the Google Drive access platform.

The theoretical understanding of competitive intelligence emphasized the organizations' importance in analyzing their external and internal environment to assist in the definition of their strategies. Thus, acquiring information from the external environment can be considered a propelling strategy to reach a competitive advantage for organizations (Choo, 2001) since it allows to identify trends and capture market information.

In the qualitative approach, in which the missions and visions of major hotel chains were analyzed, it was possible to see that the client is the main actor, which suggests a greater concern of these organizations with this category than with the other figures. The main words used in the strategic direction were related to excellence, quality, and hospitality. However, the questionnaire applied showed that few people take part in satisfaction surveys, and those who did so never received any feedback from the hotel, which leads to a lack of motivation to take part in other surveys.

It was possible to see that the guests are not encouraged to participate in the satisfaction survey and that the hotels do not always provide such a tool. This contradicts Choo (2001), who stated that the organization should keep in touch with important actors in the organizational environment and seek to capture more insights from its clients through its associates' network.

On the agency websites, guest participation is low, which shows a lack of interest in sharing experiences. Although social media are considered tools that influence the company's reputation, it is possible to observe the need for improvements (Nicoli & Papadopoulou, 2017). To Tuominen & Ascenção (2016), Pratt & Tolkach (2018), Townsend *et al.* (2018), connected technologies improve the consumers' relationship because their good use can bring a competitive advantage to the organizations since clients look for information to guide their choices (Costa *et al.*, 2016b).

It is important to have a high index of respondents who agree that the guests' perception can improve the hotels. In addition, it is noted that customer opinions can contribute to the achievement of advantage over the competition. Cancellier *et al.* (2014) portray the importance of talking to customers and collecting their opinions for business development.

The findings, the lack of encouragement to take part in satisfaction surveys, and the lack of interest from the hotels point out opportunities for those who want to gain unknown market space in relation to their competitors by investing in this type of procedure, as well as sensitizing guests about how important it is to answer satisfaction surveys about users' service and hospitality. Hotels must appreciate these researches and give feedback to their respondents by acknowledging the creation of value promoted by the latter one. Guests' opinion regarding the experiences lived in the hotel is extremely important for the improvement of services and the definition of its strategies.

Respondents believe and point out that Brazilian hotels should invest in new ways to monitor customers' opinions. This is justified by the need to understand the demands to take advantage of threats and opportunities. However, actions of this type are characterized by the need for long-term planning, as Richard (2017) states. Moreover, according to Ford *et al.* (2013), there is a great deal of information in the environment that can assist companies to formulate their strategies, and these can be obtained through an environmental scan, which, according to Karami (2008) and Robinson & Simmons (2018), is a procedure that can be considered as paramount for the organizations' strategic planning.

In short, companies will only meet their clients' expectations if they effectively know their real needs, which will only happen if the managers do so and the organization decides to "hear them." Getting close to the people who benefit from the services offered will certainly contribute a lot to future decisions on how and when to offer the best to their guests.

Final remarks

This research brought a theoretical underpinning about environmental scanning in the hotel segment. Given the emphasis of the current economic situation in which the service sector

is located, it is necessary to understand the importance of external environment monitoring to prepare to deal with market unpredictability and possibilities.

The study's objective was to analyze the strategies of the Brazilian hotel industry in the monitoring of clients' perceptions about hosting services. The analysis of the missions and visions delimited the strategic yearnings that the hotel chains suggest by identifying that the main focus is based on clients, with issues related to excellence, quality, and hospitality. However, it was possible to observe the incoherence of the objectives suggested in the hotels' strategic design compared to the practices and experiences lived by the guests who took part in the research and whose access was reached through social networks and travel agency's websites. The "questions and answers" set was valuable in the sense of understanding the hotel guests' perception about the attention they are given when it comes to service quality and knowing the procedures adopted by the national hotel sector concerning the competitive environmental scanning, which was seen as inexistent.

The satisfaction survey is characterized as a tool to monitor the customers' perception of the evaluation of the services provided. In the current case, it is characterized as an evaluative resource of the client's experience in the lodging sector. Despite being seen as a fundamental element in service evaluation practices, there was a lack of follow-up and interest of hotel staff to investigate the positive and negative points of the guest's experience during the stay.

The study by Choo (2001) suggests that the actors present in the organizational environment refer to customers, suppliers, competitors, and staff. Therefore, the scanning of external information can help the organizations in the search for a competitive advantage. However, focusing too much on the client characterizes the disinterest of the hotels in the search

for relevant information with other social actors, failing to identify important sources of information that exist in the environment in which it operates.

The study was initially intended to be performed with hotel managers. However, given the impediment due to lack of access, another perspective of the research based on clients' perception was done. This research presented limitations on the methodological structure since the information collected only concerns the guests motivated by leisure and entertainment travel. When questioned if they would stay again in that hotel, they mostly disagreed and were not later questioned for this opinion. Nonetheless, it is an opportunity for future researches to hear the managers who belong to the hotel chains located in Brazil, and the other guests whose reasons for traveling are related to business, events (fairs, congresses, convention), studies, visits to relatives, and friends, and health (treatment and aesthetics), among other topics.

Finally, it is understood that this research is relevant as it contributes to offer new perspectives on the importance of guests' perception about the environmental scanning for the benefit of the Brazilian hotel industry. Therefore, whether in the service, commercial or industrial sectors, the contact with clients and suppliers in the search for useful information is extremely important to define strategies whose objective is to meet the yearnings and the expectations of all the common-interest actors, besides improving the company's performance in a market that is more and more demanding, which is not always the case.

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