INTRODUCTION.

The history of hospitality as a source of income began in ancient times, when travelers were searching for a lodging for the night and stayed in guest houses and taverns. Now people have many ways to travel and are able to choose the type of accommodation they want: luxury hotels, hostels, mini-hotels etc. While hotels satisfy all the customers’ needs by offering luxurious and expensive holidays and hostels are aimed for budget tourists, who need a bed and basic facilities, mini-hotels occupy a boundary position.

Mini-hotels are considered as places for a short stay with small number of rooms and services. Most of them are unfamiliar to the average consumer, whereas luxury hotel brands, like Hilton and Marriott, are known all over the world. The reason for it is lack of customer loyalty in mini-hotels. One of the biggest problems of mini-hotels is unawareness of customer and the lack of marketing promotion, which reduce the probability of customer’s return.

Loyalty programs play a huge role in a marketing strategy building. Thereby, the introduction of loyalty programs into mini-hotel strategy is still a burning issue. On the one hand, it helps to encourage regular customers and convince the other ones to repurchase. On the other hand, loyalty program can serve as a source of statistical data for identifying problem areas.

The aim of the research is to assess the expediency of loyalty program implementation in mini-hotels in Moscow. To achieve the goal, the following tasks were set:

1. To describe the tourist flow of Moscow.
2. To reveal the factors, influencing the repeated purchases in mini-hotels.
3. To identify the problems faced by mini-hotels in Moscow.

The object of the study is mini-hotels segment in Moscow. Mini-hotel is a hotel with number of rooms less than 50. The detailed characteristics of this accommodation type is presented in the second chapter. The subject of the study is the necessity of loyalty program introduction into mini-hotels in Moscow.

Theoretical background.

During the research, the literature of Russian and foreign authors was used, as well as the materials of periodicals.

The term «loyalty» was considered in the most of works devoted to customer loyalty. The basic theories were offered by P. Kotler, B.R. Barringer and R.D. Ireland, G.S. Day, D. Aaker, A.S. Dick and K. Basu, A. Kuusik. However, some scholars have opposite views about the meaning of "loyalty"

With the developing of loyalty topic, three main aspects of loyalty were identified in R.L. Oliver, K.L. Ahluwalia, C. Moorman and M.D. Johnson's works. These academics put an end to the disputes about the meaning of the term "loyalty" and united the popular theories in a model of three aspects: attitudinal, behavioral and cognitive.

Nevertheless, there is a huge gap between domestic and foreign works, as Russian direction began to develop much later. In this work, the models, developed by foreign scholars, were taken a basis. The issues about loyalty models were characterized in works of A.S. Dick and K. Basu, W. Reinartz and V. Kumar.

The quantitative method of research is explained by the need to analyze tourists' opinions about their stay in Moscow and their views about loyalty programs. The method applied was online survey in Google forms. The sample was 126 respondents.

The research paper consists of an introduction, three chapters, conclusion with recommendations, references and appendixes. There are 67 pages, 21 pictures, 8 tables, 74 literature resources and 4 appendixes. In the first chapter, the theoretical aspects of customer loyalty are characterized. In the second chapter, Moscow hotel industry review is presented. In the third chapter, the results of online survey are described and analyzed.

CHAPTER 1. THEORETICAL ASPECTS OF CUSTOMER LOYALTY.

From ancient time the bargainers tried to satisfy their clients proposing goods for their needs and wishes. The sellers knew their regular customers and provided special offers such as discounts and better products. That method helped early businessmen to stay afloat in case of growing competition and have a finance shield in the event of decreasing demand and bankruptcy. When the supply overtook the demand, small shops became corporations, a seller and a buyer stopped interact directly and know each other by sight. Therefore, people needed another way to show their favor to clients.

In the end of 18^{th} American entrepreneurships invented the first “bonuses” in the form of copper tokens, which were given for purchase and could be used for the next visit. However, they quickly realized, that coins were too much expensive to make and replace them with stamps to reward loyal retail clients in 1891. The modern loyalty programs appeared in the beginning of 20^{th} century in the USA, when Betty Crocker launched the box top program. The point was that consumers detach upper part of a box and send via mail as a claim of purchase and win prizes [65]. We can associate it with the Coca-Cola campaign, where people send bottle caps and get white toy bear or money on the phone account.

American Airlines in 1981 introduced the most well-known loyalty program (AAdvantage), when allowed customers to earn “miles” and then pay by them. In the meantime, there are over 50 million members of a Frequent-Flyer Program. That marketing strategy came to the hotels in 1983 with Marriott’s Club Marquis [73] and then became one of the first coalition loyalty program (“a loyalty card system that offers incentives to customers of two or more businesses in return for allowing those businesses to collect user data”) [66].

Despite the fact, that loyalty, primarily, is associated with those two spheres above, the percentage pf people, who participated in the programs [67], are less than 30%, while product retail, for instance, has 57% (Appendix 1). Yet, when speaking about reward programs, the association with hotels and airlines emerged first.

1.1. Definition of customer loyalty.

The research of customer loyalty is clearly related to the appearance of first rewards programs in the beginning of XX century.

The word “loyal” itself means “faithful and devoted to something or someone”, obviously, it signifies much more in business than in daily life. The term of this phenomenon evolved over the past half century and, according to B.R. Barringer and R.D. Ireland (2009), became a valuable asset of any company [12]. Nevertheless, there is still no consensus on what it exactly means. G.S. Day in 1969 considered loyalty as repeated purchase and this idea was developed by several advocates of this approach [18]. However, this approach does not stand up to closer examination as there are no explanation of the reasons for regular buying.

The alternative standpoint offered by D. Aaker (1991) implied that brand loyalty showed clients’ readiness to change their choice [8]. His predecessors measured loyalty by indexes based on attitudinal and behavioral aspects (Lutz and Winn, 1974) [31]. B. Wernerfelt pointed out, that consumers were loyal, because they had a reason to be. He also provided a concept of “cost-based brand loyalty”, where brand utilities had a positive impact on brand preferences [40].

Needless to say, that all experts treated loyalty from different sides. Since, some theorists define loyalty as fundamental emotional commitment, depending on non-purchase factors, such as altruism (helping the service firms or people) and advocacy (i.e. desire to recommend) [17], willingness to pay a premium, or “continued silence in the hope that things get better” (Watson G. et al., 2015). Moreover, some of scholars scrutinize loyalty in terms of target and temporal orientation [39]. As for target, they imply the issue of whom the client is loyal to (i.e. a firm or a salesperson), while also temporal orientation entails how loyalty is measured: as future predictions or previous experience. For example, people can be asked to recall last time being loyal or assess their intentions (Ailawadi et al. 2008; Davis-Sramek et al. 2009; Johnson et al. 2006; Wagner et al. 2009).

Despite the huge variety of works dedicated to customer loyalty, there is no compromise solution in finding universal method of determining this phenomenon. Nevertheless, there are some widely accepted theses such as dimensions, antecedents and outcomes of loyalty, which will be covered further.

1.2. The dimensions of loyalty.

There are two approaches to customer loyalty: stochastic and deterministic. First one addresses the concept to observable behavior, specifically past purchases. The second view is about loyalty as an attitude, which is configured by values and beliefs (Harmeen S. and Harsandaldeep K., 2015). As seen in the previous section of the paper, the first definitions of loyalty comprised only stochastic approach, later attitudinal component appeared. Recent research admitted the necessity of multidimensional principal, where true loyalty was concerned to be a composition of attitude and behavior.

Behavioral aspect shows as repurchase intention, when client's purpose is to support relationship with exact company and conclude the next purchase just at that spot (Jones et al., 2000). Several advocates of this approach supposed that loyalty was measured by proportion of purchase (Cunningham, 1956), purchase sequence (Kahn et al, 1986) and probability of purchase (Massey et al, 1970). The theory is "convenient" to businessmen as they can count their profit from such "loyal" clients. Frequent buying directly increases the revenue of the firm and shows customer's ability to support it (Watson G. et al., 2015). The main problem is that managers fail to separate the loyalty and necessity. For instance, people need direct flight, which is conducted by only air company. The clients seem to be loyal, but in fact they would change preferences immediately if given the chance (Keiningham T. et al., 2007). Therefore, there could be another reason for loyal behavior and attitudinal aspect was taken into account.

Attitudinal concept refers to creating association between an object and evaluation. According to K.L. Ahluwalia (2000) and C. Moorman (1992), people use information to form the attitude. R.L. Oliver (1999) considered attitudinal loyalty as a cognition that advantaged a specific object and a strong opposition to external factors. Like a shield, positive attitude defends our business offer from competitors' invasion (Ahluwalia, 2000). The degree of attitudinal differentiation and attitudinal strength compile the individual's relative attitude with regard to entity, where the highest ratio is reached by strong differentiated attitude (Dick and Basu, 1994). By relative attitude Dick and Basu (1994) understand "the degree to which the customer's evaluation of one product or brand dominates that of other alternatives" [19]. While behavioral loyalty results from habits and situational drivers, attitudinal one is based on positive previous experience (Johnson et al. 2006). Thus, the hypothesis is not universal, because attitudinal loyalty is based on conformity and can be only aspirational, that prevents from actual purchases and effect on performance weakly (Berger and Heath, 2008), the same cannot be said for behavioral aspect.

The latest studies offered the third dimension – cognitive element. From that point of view, loyalty is premised on "conscious evaluation of brand attributes or the conscious evaluation of the rewards and benefits associated with repatronage" (Jones T. and Taylor S., 2007). This notion includes several forms:

- price tolerance: the maximum price satisfied customers are willing to pay or tolerate before switching (Anderson, 1996).
- first choice (Ostrowski et al., 1993)
- top of mind: brand emerging in customers' minds when thinking about industry or product (Dwyer et al., 1987).
- exclusive consideration (Gremler and Brown, 1996): make no selection when needing special product or service, have prior brand.

All in all, the multidimensional approach seems to be theoretically challenged as there is not so much works, dedicated to the last (cognitive) approach. Nonetheless, the mix of attitudinal and behavioral elements provides the model, involving antecedents and outcomes of customer loyalty.

1.3. A framework for customer loyalty.

According to Dick and Basu (1994), the model of customer loyalty consists of antecedents, which are divided into 3 groups and result in relative attitude and consequences [Appendix 2].

Antecedents consist of three segments: cognitive, affective, conative. Cognitive antecedents are connected with brand beliefs and other information determinants. Four factors refer to them: accessibility, confidence, centrality and clarity. Accessibility is considered as a degree of how easy the attitude can be got out from memory. This ratio can be influenced by contextual cue, such as brand recognition, and direct or indirect experience. The reason lies in perception peculiarities, which can impact on evaluation. Confidence means the certain the attitude is, while centrality shows how attitude to brand correlate with individual's value system. In the meantime, clarity reflects the transparency of customer's choice, when there is only one attitude position [19].

In its turn, affective antecedents are resulted in feelings, that appeared in case of brand interaction. They include emotions, that are best predictors of behavior, moods, influencing positively on frequency of purchase, primary affect (primary physiological responses independent of cognition), and satisfaction.

Lastly, conative antecedents relate to behavioral dispositions toward the brand and are segmented into switching costs, sunk costs and expectations. First type is defined as one-time expenses, when customer changes one supplier to another. Sunk costs are expressed in subscriptions or season tickets and force clients to be loyal even if the quality of service became lower.

Dick and Basu's study results of loyalty consequences comprise search motivation, resistance to counter-persuasion, and word-of-mouth (WOM). With growth of loyalty level, a will to search for information or alternatives decreases as the costs are lost time, money and all sorts of inconvenience (Ratchford, 1980). Moreover, the stronger the attitude to the brand, the more resistant consumer can be to change his choice. As for the WOM, this phenomenon happens to be, when consumer get strong positive or negative emotions from interaction with brand. Obviously, in case of WOM the attitudinal aspect of loyalty will express stronger than behavioral.

To sum up, the loyalty framework is based on two-dimensional model and all the factors received have the attitudinal or behavior fundament. Some of the scholars add social norms and situational influence to the model, but recognized authorities on the subject incline to the scheme above.

1.4. The determinants of customer loyalty in hotel industry.

Several factors affect customer's willingness to be loyal (willingness, because loyalty is a voluntary decision). There are satisfaction, trustworthiness, image and importance of relationship. The first factor confuses most of all because of misconception about equality of loyalty and satisfaction exists. Generally speaking, satisfaction is a difference between expectations of customer and reality. In 2008, Bastos and Gallego described this notion as "a post-choice evaluative judgement of a specific transaction, which can be viewed directly as an overall feeling, best specified as a function of perceived quality" [13]. Previous studies insisted that there is a strong connection between satisfaction and loyalty, so dissatisfied customer switches to other companies. However, recent papers claim that even disappointed customer could come back for different reasons (Keiningham T. et al., 2007). Therefore, increased satisfaction raises the level of loyalty, but bad experience does not always mean refusal.

Brand image affects our own image, because we define ourselves by assets we have (Belk, 1988). On the other hand, people divide each other into social categories by brand commitment (one of possible ways). Trustworthiness is a governing principle of communication between companies as well as between customer and firm, because it creates highly valued relationships [14].

Hospitality, as any service industry, inherent several factors affecting the level of loyalty. However, the structure of main determinants differs from general factors characterized above and, according to Kandampully et al (2014), consists of 5 main aspects, such as loyalty programs, perceived switching costs, customer satisfaction, service quality and commitment [27].

Loyalty programs in the form of membership cards and reward programs affect directly on customers' willingness to be loyal as with switching costs. However, loyalty programs are considered as instruments for creating an imitation of loyalty, because it is difficult to figure out the behavioral and attitudinal dimensions and understand real motives of customer (Xie and Chen, 2014). There is a direct connection between loyalty and reward programs: the more attractive the benefits are, the more loyal customer becomes. In its turn, switching costs are "the costs that a consumer incurs as a result of changing brands, suppliers or products" [68]. Costs are mostly evaluated in money, but can also be assessed in psychological, time- and effort-based terms. On the contrary, service quality influences customer preferences indirectly, but still helps to estimate his opinion about facilities offered. As for the customer satisfaction and commitment, these two variables are widely used to assess the level of loyalty. Satisfied customers are more likely to repurchase and recommend the product or service to the friends.

1.5. Types of customer loyalty.

As discussed at the outset, there are three dimensions of loyalty: attitudinal, behavioral and cognitive. Dick and Basu (1994) created a matrix of four types of loyalty, which are based on attitude and frequency of purchases.

Table 1. Dick and Basu's matrix.

		Repeated patronage	
		High	Low
Relative attitude	High	Loyalty	Latent loyalty
	Low	Spurious loyalty	No loyalty

No loyalty.

When there is low relative attitude and low frequency of purchases, it means the absence of loyalty. Nevertheless, low attitude does not signify, that customers do not like the product of the company. In most cases, it is evidenced, that the firm (or the product) is not familiar to the consumer due to recent the enter or the specifics of the market, when industry leaders seem to be similar to each other (for example, pharmacy).

Spurious loyalty.

Sometimes the customer is called loyal because of repeated purchases, but as we define above, it is not a signal for loyalty. When there is a high repeated patronage, but low relative attitude, spurious loyalty occurs. Such situation can be happened, when the customer is not interested in searching appropriate option and accept the nearest or most familiar place to purchase.

Latent loyalty.

This phenomenon emerges, when an individual has high relative attitude, but low repeated patronage. It can be caused by specifics of the company, its location or segment. Customer may like the restaurant, but eat there once a year and visit cafes near his house.

Loyalty.

True loyalty means the combination of high relative attitude and high repeated patronage. Such type can be achieved, when in individual has positive view about the product or service and wish to buy it repeatedly.

On the other hand, W. Reinartz and V. Kumar (2002) considered loyal customers with relation to the duration of relationships with a company and their profitability [37]. This matrix helps company to build strategy on the assumption of four types.

Table 2. W. Reinartz and V. Kumar's matrix.

		Duration	
		Short-term	Long-term
Profitability	High	Butterflies	True friends

	Low	Strangers	Barnacles

Strangers.

This type of customers is characterized by rare and small purchases. Companies are not interested in developing relationships with them, because it is difficult to repay expenditures.

Barnacles.

Such customers often buy products or use services of the company, but generate low revenue. Largely, managers try to transfer barnacles to true friends.

True friends.

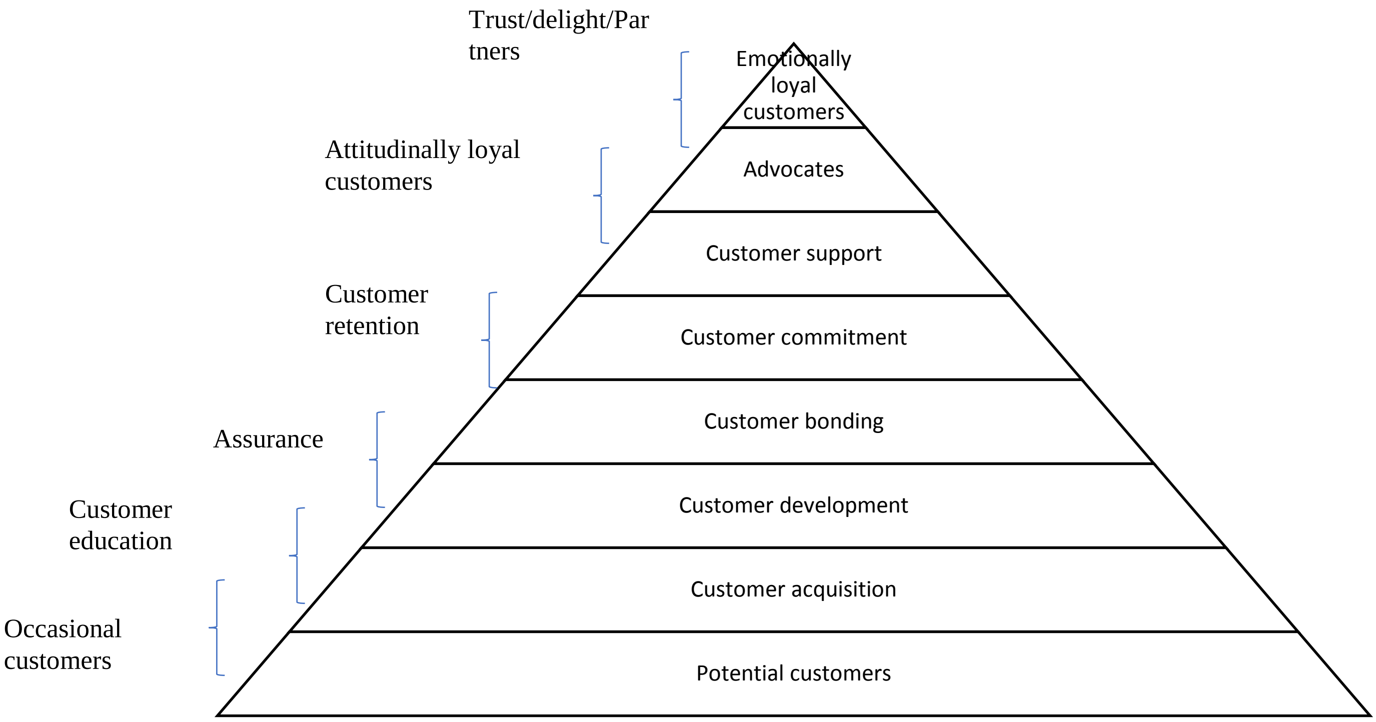
True friends have long-term relationships with the company and give huge revenue to it. They are the most attractive customers and companies do their best to hold them and prevent leaving to the competitors.

Butterflies.

Butterflies are described as clients who gain high profit for the company, but are likely to switch to the competitors. The most effective strategy is to use them as much as possible until they leave.

1.6. Life cycle of customer and his loyalty to brand.

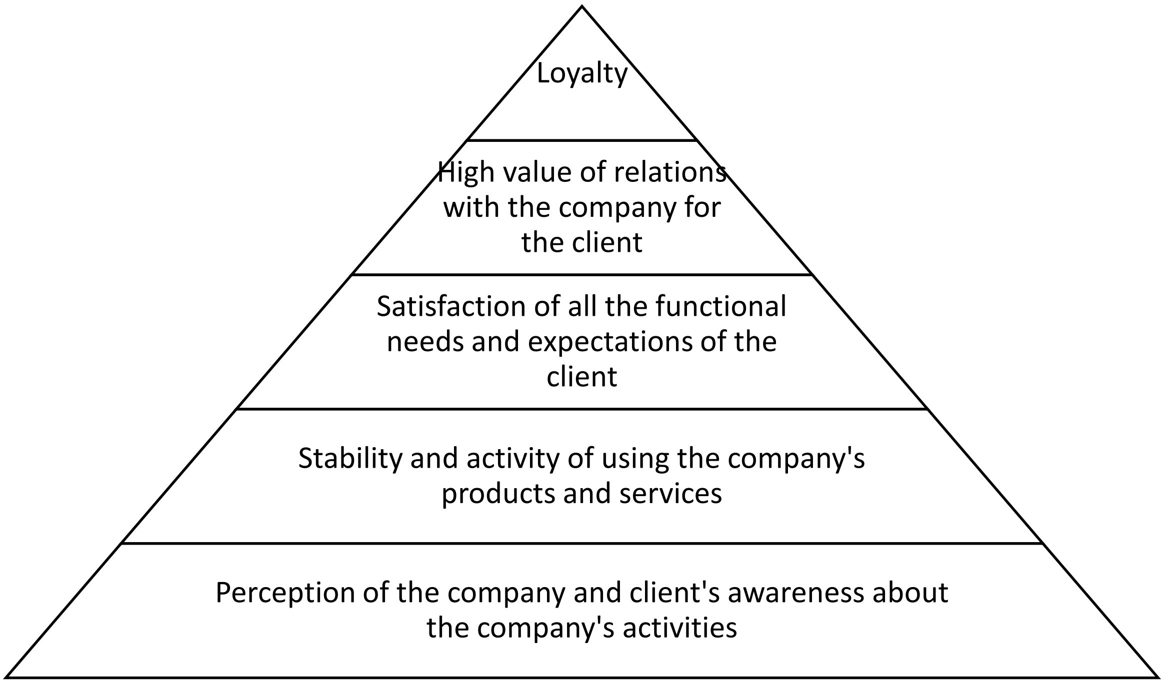
As for the hospitality industry, loyalty in this sphere is understood as long-term relationships. To achieve this, there is a loyalty pyramid occurred, that describes basic steps to true customer loyalty (Kandampully et al., 2014). The last stages are the most meaningful and significant to the company.



Pic. 1. Customer loyalty pyramid.

Obviously, there are many driving forces providing the developing of the customer and transferring him from one stage to another. The determinants of loyalty listed earlier take the role of the forces: convenience, fulfillment, perceived value, switching costs, quality, satisfaction, attachment, trust and affective commitment.

The loyalty pyramid presented above is largely owing to stages, which are passed by the customer within the framework of relationships with the company. However, the life-cycle of customer is also introduced by pyramid, created by K. Balashov (2007). It consists of five levels: from the first impression to loyalty or finishing the contact.



Pic. 2. Balashov's pyramid of loyalty [7].

1. A meeting is a first stage, when future customer gets much information about the company and forms the attitude to it.
2. First customer's purchase and consumption is characterized as an experience of interaction with the company, when it should bring satisfaction to the client.
3. When customer is satisfied, the firm start to build up the loyalty to its brand and motivate consumers to repurchase actively.
4. Customer's leaving. For a company, this step is important, because it should make the client stay.
5. Customer's coming back.

1.7. Measuring customer loyalty.

There are few methods used to measure customer loyalty. Needless to say, that they are multipurpose and applied in many sectors, including hotels, but many of them have peculiarities, contradicted to current loyalty theories [6].

Method of needs division was introduced in 1950s and by Aaker et al. The essence is that loyalty can be assessed by the number of customer's repurchases.

The advocates of this approach are sure, that if the share of repurchases is above 67%, then client is loyal. However, as it is pointed earlier, repeated buying does not mean loyalty.

Conversion model, offered by J. Hofmeyr and B. Rice, uses four indicators: brand satisfaction, which is directly proportional to brand adherence; alternatives, that can be better or worse than our brand and affect the customer's choice; brand choice importance, that is necessary for loyalty emerging; fluctuations or uncertainty will delay decision about purchase. The main problem of this model is in its abstractness and impossibility to analyze indicators quantitatively.

NPS (Net Promotion Score) is the most popular model for measuring customer loyalty. It is simple and not resource-intensive. Hotels implement this index to their marketing analysis and modify it. In general, all clients are divided into three groups: promoters (9-10), passive clients (7-8) and detractors (0-6) in dependence to their answer to the question: "On a scale from 0 to 10 with what probability will you advise the services of the company to friends?". Promoters generate the most part of revenue and are loyal, passive clients have neutral view and balance between "recommend" and "not recommend", detractors will not recommend the company and can even dissuade from using its services. NPS itself is calculated as: Promoters (%) – Detractors (%). Apart from NPS, companies ask clients about the reasons of their grade. It is believed, that corporations with high NPS can refuse marketing investments, because the client base will be replenished by itself [51].

Approach offered by airline ANA and Fuji-Xerox experts examines the connection between customers' satisfaction level and their loyalty [5]. There are three big segments [Appendix 3]:

- Bad zone: dissatisfied customers – terrorists
- Indifferent zone: undecided customers
- Favorable zone: regular satisfied customers – preachers

It is worth noting, that ANA's approach implies the forth type of customers: clients, who have no choice and are forced to buy company's products.

The satisfaction measurement is provided as in previous model – by means of survey (points). Obviously, the key strategy is to persuade customers to repurchase and gain revenue from loyal consumer. There is Pareto principle in action: 20% of regular customers bring 80% of income.

The Customer's Loyalty Ladder (Wilton) includes 7 levels of loyal customer, increasing with the developing of the relationships with the company.

1. Suspect – potential customers. They have not bought anything yet, but could do it in future. There the whole segment is considered.
2. Prospects – potential buyers, too, but they already have interest to the exact product of the company.
3. Customers – people, who bought something once. The most crucial aspect here is to try to attract them to repurchase.
4. Clients – regular customers. Despite they do repeated buying, they should be paid attention to, so they will be satisfied.
5. Members – people, who use their membership and participate in loyalty programs.
6. Advocates – clients, who will recommend the company to other people.
7. Evangelists (Distributors, Raving Fan, Partners) – true believers and friends. They tell everybody about the company.

Another method was offered by D. Aaker and includes several factors, which were described in 1.4: perceived switching costs, customer satisfaction, service quality and commitment and patterns of consumer behavior.

1.8. Types of loyalty programs.

In general, there are four types of loyalty programs, applied in different spheres: retail, airlines, hospitality etc. Specialists highlight the following programs: points, tiered, cash back, coalition [66].

Points loyalty programs are widely used in hotel industry and airlines, for instance Marriott Rewards. Customers earn points or miles and can spend them for the next staying or upgrading a room. The main advantages of this type are independence from currency (worldwide programs), aspirational purchases to gain bonuses and possibility to analyze customers' behavior through large data base. Nevertheless, such program is hard to transfer into money on balance sheet and suboptimal service evaluation, when customers earn much more or less points and cannot spend them for a long time.

Tiered loyalty programs are aimed to increase customers' status with the growth of buying. When the total sum of purchased services or goods reaches the definite number, customer enhances his status and gets the access to limited options. However, this strategy is effective, when consumers are highly engaged and in any case loyal. For example, Best Western hotel chain implemented Best Western Rewards with three levels: platinum, gold and diamond cards.

Cash back loyalty programs are similar to points programs, but in this case, you get a part of your money back. This type is widespread in product retail and pharmacy in contrast to hospitality. On the one hand, it is easy for customers to spend such bonus. On the other hand, cash back program has limited timing for laying out and is not suitable for rare clients.

In *coalition loyalty programs* customer can earn bonuses from one service and spend it to another because of common database. Mostly, partner businesses use this type (hotels and airlines) due they always come along in one sphere (tourism). Yet, the program is suitable for real company's advocates and in the context of airlines most of people prefer the cheapest or the quickest flight instead of exact company.

Needless to say, that nowadays companies combine all types of loyalty programs in order to have distinctive model, which will attract customers. Accordingly, most of hotel chains use points, which then are transferred into status card or miles for flights or privileges clubs (Fairmont President's club).

1.9. Conclusions on the first chapter.

The term “loyalty” appeared in the beginning of the XX century, when companies had become grid and attracted customers not only by products because of high competition growth. Initially, loyalty was considered as repeated purchases, but then specialists understood, that attitude and consumer behavior played more crucial role in brand adherence.

There are several factors, influencing customer’s loyalty: satisfaction, trustworthiness, image and importance of relationship. It stands to mention, that satisfaction is not equal to loyalty, because it refers to positive (satisfaction) or negative (dissatisfaction) deviation between customer’s expectations and reality, whereas loyalty is about emotional connection to the brand. Moreover, service industry presupposes quite different factors: loyalty programs, perceived switching costs, customer satisfaction, service quality and commitment.

According to the most famous models, true loyalty is described as a combination of high relative attitude and repeated purchases (Dick and Basu, 1994) or relationship duration and profitability (W. Reinartz and V. Kumar, 2002). To assess loyalty, specialists apply many methods, but the most utilizable is NPS, which is easy and quick way to estimate customer’s adherence.

In the next chapter, the distinctive features of Moscow hospitality market will be examined.

CHAPTER 2. MOSCOW HOTEL MARKET ANALYSIS.

2.1. The distinctive features of marketing in the sphere of services.

The nature of services is extremely different from goods. Despite the common purpose of customer satisfaction goods' and services' production processes have special characteristics [Table 3] [4].

Table 3. Goods and service differences.

Goods	Service
Tangibility	Intangibility
Separability	Inseparability
Consistency	Variability
Durable	Perishability

Intangibility. In contrast to goods, customers are not able to test-drive the service before the purchase. We are not able to judge the quality until we use it. It is impossible to test whether the pillows in hotel are soft until you check in. After service rendering, the only things client gets are a receipt and experience (positive or negative). Therefore, hoteliers set a task to create the atmosphere of incredible emotions for customer and encourage him to come back.

In this case, there is a problem with service: the quality can be assessed only after client's consumption. However, when the customer uses the service, it is considered to be rendered and we cannot return it. In this way, company representatives are aimed to decrease the uncertainty of a client and ensure full satisfaction of his needs basically by means of improving exterior: neatly trimmed lawns, immaculately dressed doormen. When we see it, we are sure to be served at the highest level.

Inseparability. Obviously, there is no way to produce service in advance, because the production occurs with consumption at the same time and so, the service process should be more flexible and adapt to the customer flow.

Perishability. Service can be characterized as a perishable product: because of inseparability of service, there cannot be a gap between production and consumption. So, any service cannot be postponed. Unoccupied table cannot be sold out later. Every empty place in a restaurant or hotel is a loss for business. The problem can be solved by implementing the early booking and prepayment. These mechanisms help to compensate the losses in case of client's refusal to come. Moreover, there is an overbooking process, which is widely used in hotel and airlines industries. Some companies sell more seats than they have. The reason is that quite a lot of people cancel their reservations right before the flight or check-in. In this case, it is difficult to fill empty places at the last moment, so overbooking helps to reduce the number of unoccupied tables, seats or rooms. Otherwise, the company should provide another hotel, flight etc., when there is overbooking. However, not every company decides to act according the law. Recent story with United Airlines [44], when the doctor was dragged from the airplane, because of overbooking, confirms this.

Variability. On the contrast to goods, each service is unique and volatile. You can never be sure that you will get the same level of quality in one hotel now and in a month. When we buy an exact brand of milk, we will not choose among identical bottles. Another reason of service instability is the difference between customers' and sellers' expectations about the service. The process of providing service is directly related to people, while goods are made on an assembly line. The cars are assembled according to algorithm, and hotel receptionists rely on their communicative skills and should adapt to each customer.

All of these service characteristics are interrelated. The service is rendered during a contact with client, because of its perishability. It is impossible to provide two identical services due to their intangibility. They are difficult to assess and standardize. People relationships do not have strict rules of communication. Surely, provision of service is regulated by etiquette, psychology mechanisms, but still the result of communication is influenced by people's mood, characters etc., so each contact is unique.

Next, we move on to hotel classification and the differences between accommodation types.

2.2. Hotels classification.

In order to analyze Moscow hotel industry, it is necessary to classify the main accommodation facilities by types of service, price segment and size. There is a big choice of accommodation types; the most popular are highlighted below.

According to ISO, the accommodation facilities are following [1]:

1. Hotel – company, which provides accommodation and, in most cases, catering services and sometimes additional services.
2. Aparthotel – hotel, consisting of apartments or studios, including private kitchens.
3. Hostel – hotel with multi-bedded rooms with shared kitchen or small café with limited choice.
4. Holiday camp – company, providing accommodation and sport and leisure facilities.
5. Motel – hotel, predominantly situated on a road, with parking.
6. SPA hotel – hotel, which is situated in spa resort and offers treatment etc.

The size of a hotel is determined by the number of rooms. According to Bystrov's handbook, there are four types of hotels:

1. Mini-hotel – the number of rooms are from 5 to 15.
2. Small hotel – the number of rooms are from 16 to 50.
3. Middle hotel – the number of rooms are from 51 to 300-400.
4. Large hotel – the number of rooms overtakes 400.

Needless to say, that the international classification differs from the Russian. The hotels are divided by small (to 150 rooms), middle (from 150 to 299 rooms), large (from 300 to 600 rooms) and mega-hotels (more than 600 rooms). Russian classification approximates gradually to international standards and now many experts unite mini- and small hotels in one group of small hotels (to 50 rooms). In this work, the term “mini-hotel” will mean hotels with rooms less than 50.

As for the price segments, hotels can belong to:

1. Budget segment
2. Economy segment
3. Midscale segment
4. Upscale segment
5. Luxury segment

Sometimes, scholars add upper midscale and upper upscale segment to compare rates for the night.

Distinct from European and American market, Russian hoteliers consider mini-hotels as economy accommodation, while in Europe, there are many small four star hotels with a wide range of services. In the following analysis, the mini-hotels relate to economy segment.

2.3. Moscow hotel industry analysis.

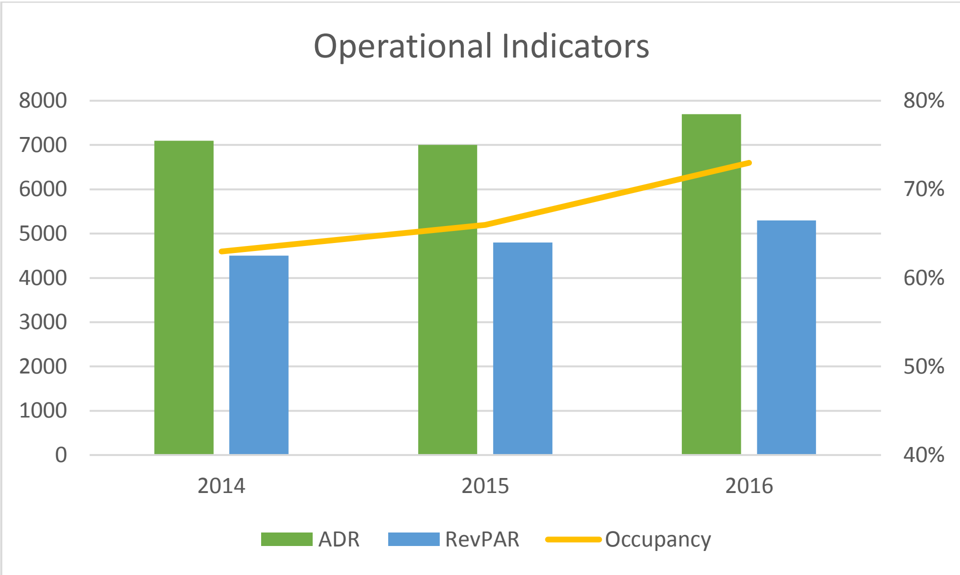
Moscow is a leading hotel market in Russia as it centers business and touristic flows. Up to 37% of the whole Russian number of rooms is situated in Moscow [50]. Nevertheless, Saint Petersburg and Sochi increase the number of guests every year and are in a top three Russian tourist destinations. While the last two cities concentrate on leisure, Moscow accentuates its business status. In spite of Russian economic crisis occurred in 2014, the hotel industry has been growing in the capital of Russia. In 2015, 2068 hotel rooms were launched in Moscow [55]. Moreover, 2016 year became a record for the whole Russian hotel industry, mainly Moscow and Saint Petersburg [60]:

1. RevPAR has increased in comparison with previous year for the first time in the history of observations.
2. Every segment of Moscow has raised the occupancy rates compared with previous year for the first time in the history of observations.

The key rates in hotel industry are ADR, RevPAR and occupancy.

- ADR means Average Daily Rate and it is the average realized room rental per day [68]. If we sold 500 rooms for 500000 rubles' total revenue, then ADR will be 1000 RUB.
- Occupancy is the ratio of rented or used space compared to the total amount of available space [68]. If we sold 10 rooms out of 50, then our occupancy rate is 20%.
- RevPAR is metric calculated by multiplying ADR by occupancy rate [68].

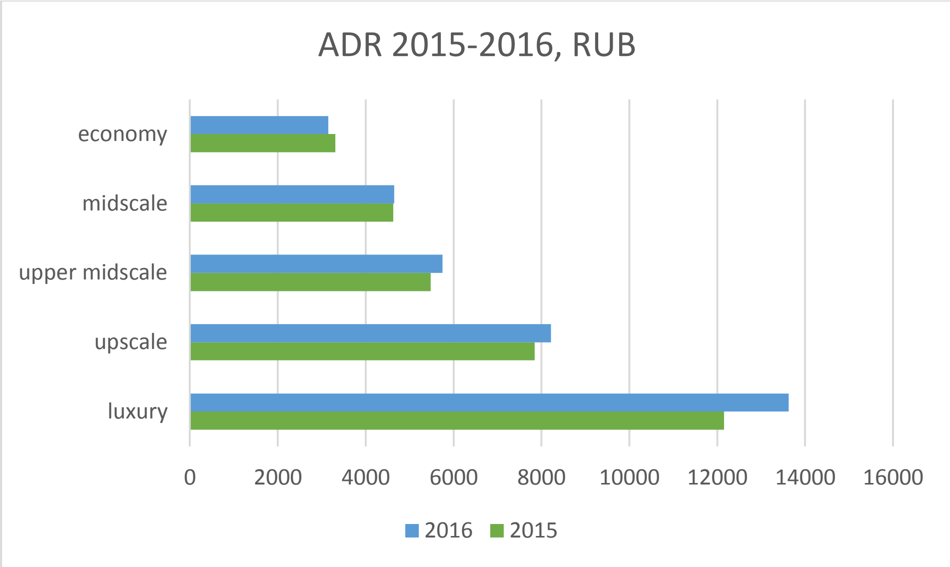
The main hotel indices showed the highest growth over the past five years (Pic. 3): 13,7%, 7,4% and 6,8% respectively (in comparison to 2015).



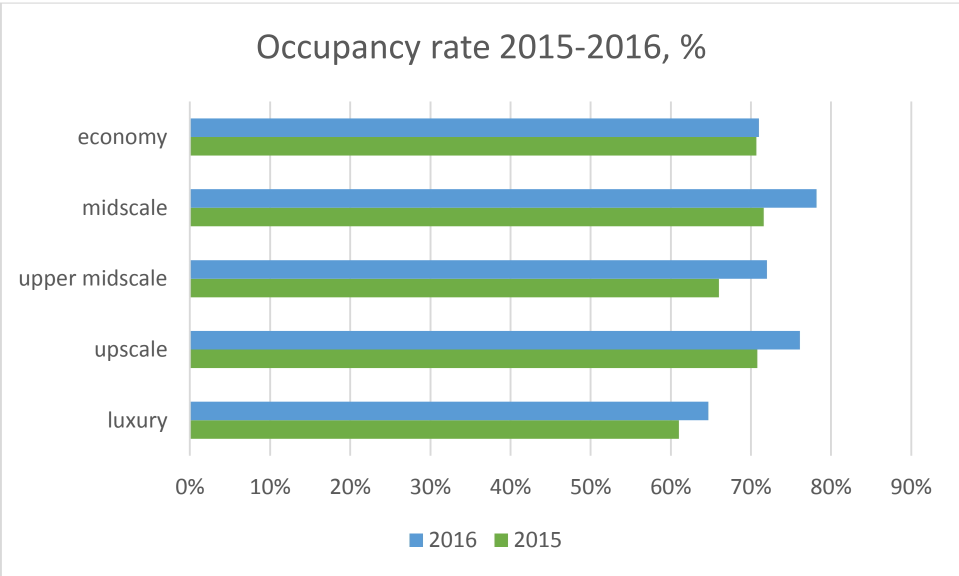
Pic. 3. Operational indicators of Moscow hotel industry 2014-2015.

Economic crisis in 2014 influenced ADR dramatically. International hotel operators raised the prices due to dollar to ruble rate. Luxury segment had the most significant ADR growth (12,1 %) and reached 13,625 thousand RUB per night. In general, this segment showed the best result among all hotel segments: the occupancy increased by 10,9% and RevPAR went up by 26,1% or 2,3 thousand RUB. The performance of midscale segment is recorded as the worst among all segments for the first half of a year: occupancy increased by 7,5%, ADR dropped by 3,9% and RevPAR became 3,3 % higher (pic.4-6) [54].

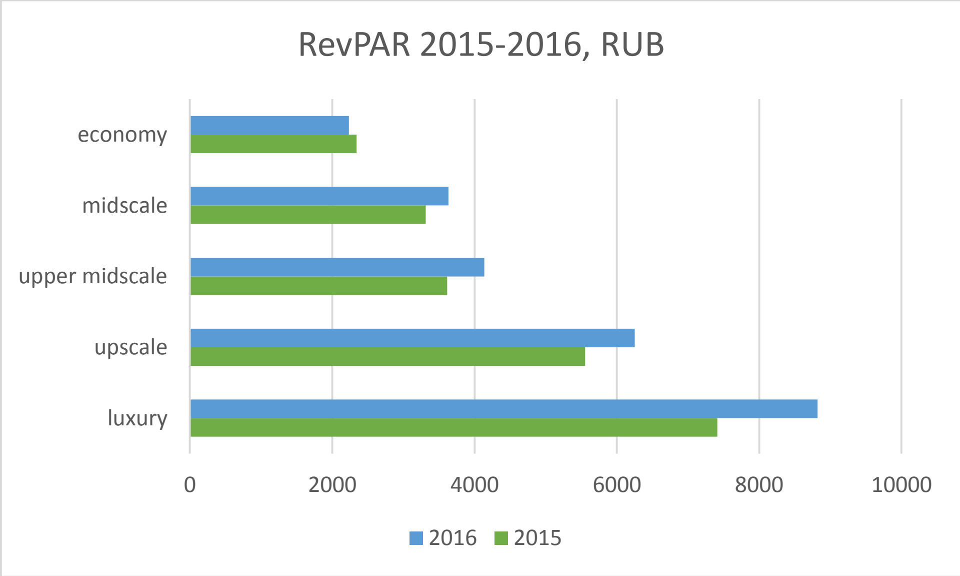
This phenomenon is explained by weak ruble, which allowed foreign tourists switch to the more expensive hotels and segments on the whole. So, with the double depreciation of Russian currency, they can afford twice as many services or twice as high level of hotel for the same money.



Pic. 4. The dynamics of ADR by segments 2015-2016.



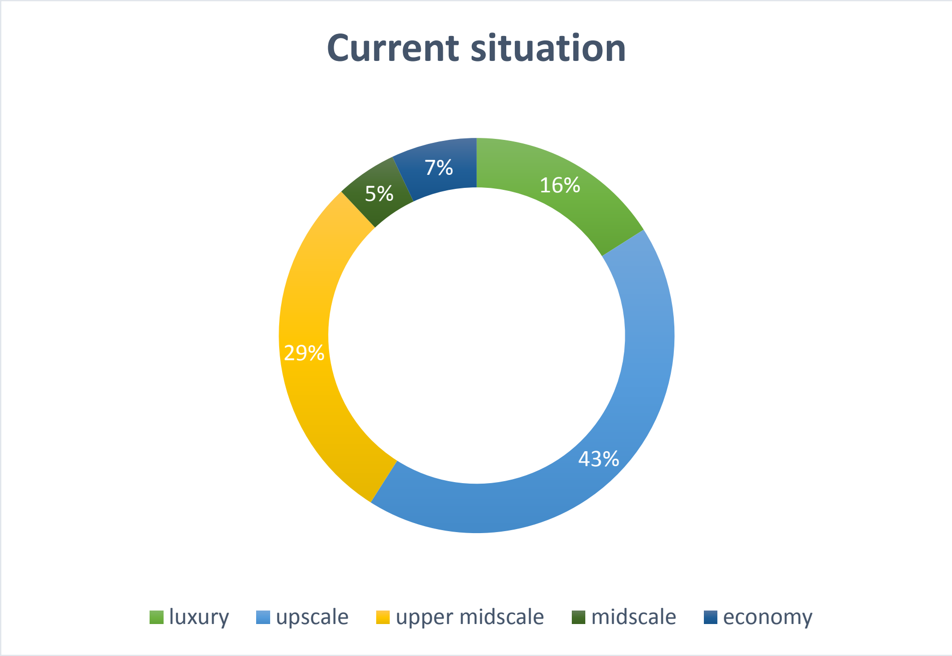
Pic. 5. The dynamics of occupancy rate by segments 2015-2016.



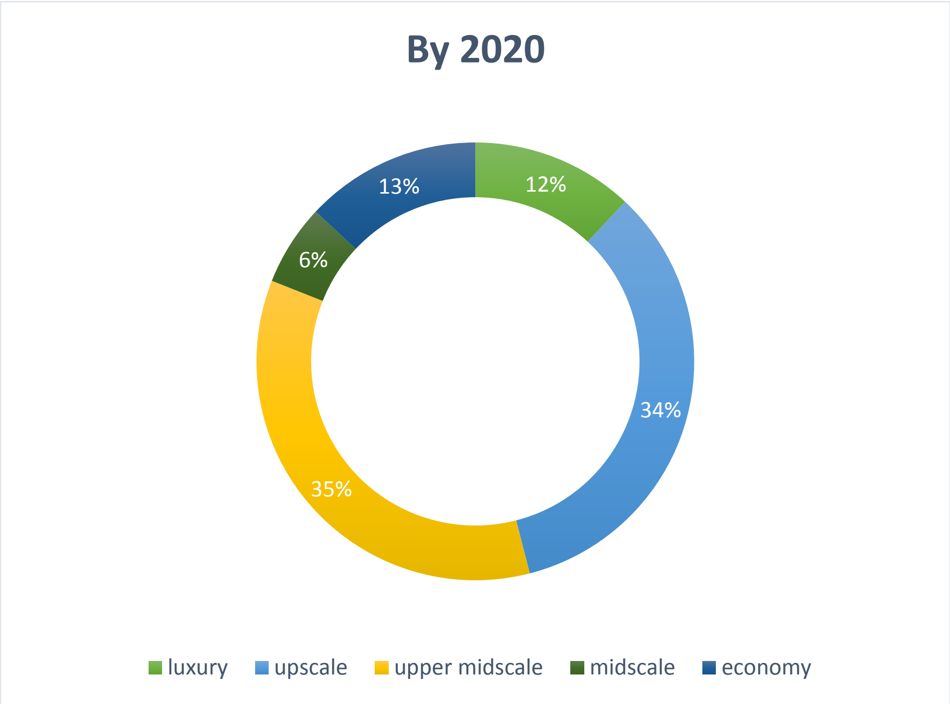
Pic. 6. The dynamics of RevPAR by segments 2015-2016.

Notwithstanding to the general positive trend of Moscow hotel market, the capital of Russia took the last place in ranking of hospitable European capitals by main operating indicators. By the end of 2017, Moscow is expected to be the 19th in RevPAR (€45,8) and ADR (€70,4) rankings and 18th in occupancy (65%) rankings before Milan (64,5%). For instance, the leader of the first two lists is Paris with indexes: RevPAR is €198,6 and ADR is €255,3. London has the highest occupancy rate (83,5%) [71].

Considering mini-hotels, it is needless to say, that in Moscow big international hotels are preferred to small ones. It is related to high prices for rent and strict tax policy, so it is more profitable to build large upscale hotels. On the contrary, the share of mini-hotels in Saint Petersburg is nearly 40% and in Sochi – 50% [61]. In any case, mini-hotels segment remains very popular among the types of small business. Now the industry grows very fast by 15-20% annually and experts forecast the increasing of a budget mini-hotels share by 2020 from 7% to 13% in Russia (pic.7-8) [48].



Pic. 7. The current shares of hotel segments in Moscow [50].



Pic. 8. The future shares of hotel segments in Moscow [50].

The crucial fact, that Russia becomes attractive touristic destination for the international guests. As stated earlier, the currency rate is very profitable for foreigners as all Russian services are cheaper now. According to World Tourism Organization (UNWTO), Russia took the 10th place among the most visited countries in the world in 2015 [62]. In 2016 the number of tourists, arriving to Moscow, exceeded 17,5 million people and it is expected to grow and reach 18,4 million in 2017 and 19,5 million in 2018 [43]. The most part of foreign tourists (total share is 27%) came from Asian and Middle Eastern countries, especially Iran tourist flow rocketed by 72%, Korean tourists' visits increased by 26%, while European flows declined by 15% [50].

All in all, Moscow is very popular destination for tourists, but it still falls behind European cities. However, it has high potential and prospect of becoming European center of business and tourist activity.

Next, we proceed to analysis of the external environment – Porter five forces analysis.

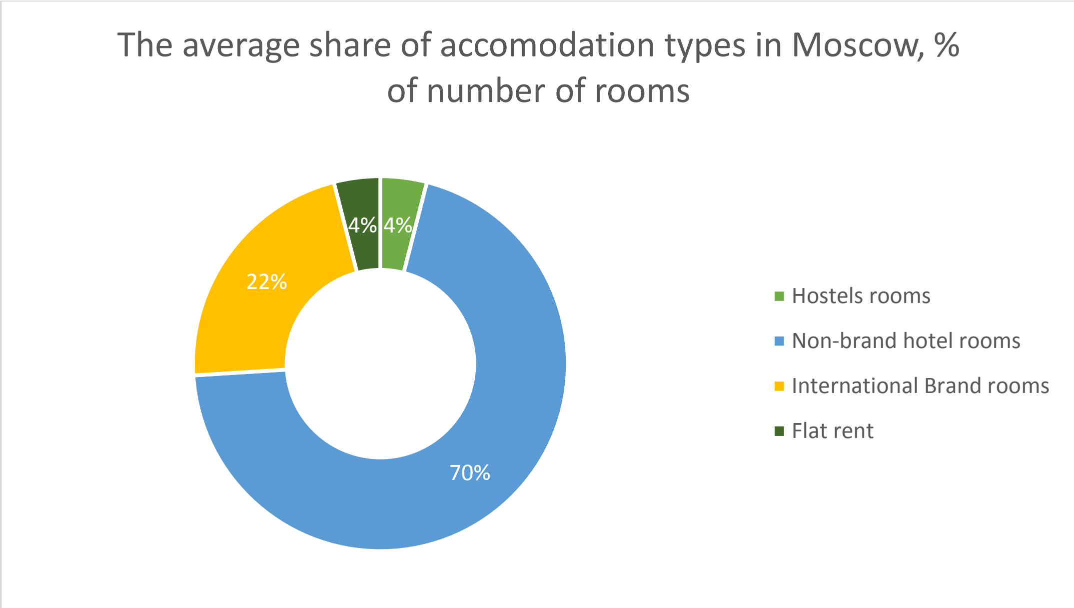
2.4. Porter five forces analysis.

Porter's model presupposed the analysis of 5 "threats": rivalry among existing competitors, threat of new entrants, threat of substitute products or services, bargaining power of suppliers, bargaining power of buyers. In this paper, the analysis of threats is conducted by means of assessing the factors influencing the forces. The factors are ranged from 1 (low level of threat) to 3 (high level of threat), then they are added up and the sum means the impact of the force. In this analysis, we focus on the Moscow mini-hotel segment and, in some cases, the hotel industry on the whole, when the information is universal (for example, law).

2.4.1. Substitute products or services threat.

There is a wide choice of hotel supply in Moscow, suitable both for business and leisure tourists: brand hotel chains, big non-brand hotels, hostels. However, not only different hotel types, but also accommodation with relatives or flat rent that are quite popular. Obviously, relatives and friends' houses are much cheaper, than other types, or even free. The direct substitutes of mini-hotels are hostels, flat rent and informal accommodation.

Now hostels turned from the cheapest accommodation to a culture. They are used by students, "backpackers", sport or school teams and budget tourists. Today, many hostels offered rooms not for 8-10 people, but for 2-3 and even have double beds for couples. Staying at hostel is characterized by informal communication with personal, close contact with other guests and, sometimes, join pastime. The price for a bed in hostel starts from 700-800 RUB and reaches 2500-3000 RUB. Now there are nearly 900 hostels in Moscow and this figure grows very fast [64]. However, in contrast to European capitals, the share of hostels in Moscow is very low (4% against 27%) (pic. 7).



Pic. 9. The average share of accommodation types in Moscow [50].

With appearance of AirBnB and its followers, the flat rent became easier and safer and so, widely used. It allows to rent a flat or a room with all equipment and feel like a citizen. The room rate is close to midscale hotel segment (2500-2700 RUB). Now AirBnB website offers more than 300 flats for rent [58].

Table 4. The power of substitutes.

Factor	3	2	1
Substitutes	Exist and have a big share on the market	Exist, but the share is small	Do not exist
Total	3		
1	Low level of threat		
2	Medium level of threat		
3	High level of threat		

Based on the data presented we can conclude that the accommodation supply remains very high and the threat of substitute service is big. The largest threat is hostels, that provide not only a room, but an atmosphere of true travelling: meeting and close communication with different cultures in one place. Moreover, many tourists prefer to stay at friends' (relatives') house as it is much cheaper and more comfortable.

2.4.2. Rivalry among existing competitors.

Based on strategic management course, the competitors are measured by several factors: the number of players, market growth rate, the differentiation level and price limitations.

As stated earlier, Moscow is not a leader in mini-hotels segment in Russia. In 2013, there is nearly 5 % of hotel market belongs to mini-hotels [53], but growth rate is high (15-20% annually), so it has favorable prospect.

In comparison to Saint Petersburg with 637 mini-hotels [49], Moscow has only 413 [42]. Yet, this information is not fully correct, because many hotels do not describe themselves as "mini" on a booking websites, but it allows to designate the proportions. Most of them has no stars, but good quality ratings from visitors (from 7 and higher out of 10). Despite the small market share, the number of mini-hotels lets us speak about medium market saturation.

Speaking about the level of differentiation, it is necessary to refer to small hotel characteristics. The term itself is blurred in Russia, sometimes it includes even hostels and boutique hotels. As a rule, there are from 5 to 50 rooms with limited services (only bed, bathroom and sometimes breakfast). Mini-hotels are "closer" to the guest because of their size and small staff. Such accommodation type is usually situated in converted flats or old historical buildings. That is why in most cases there are no restaurants, cafes of bar in it, the law forbids noise at night. Thus, it is difficult to name mini-hotels differentiated.

With big number of substitute services and competitors, it is impossible to raise prices freely. The clients will easily switch off to another small hotel.

The table with assessed factors is the following:

Table 5. The power of existing competitors.

Factor	3	2	1
Number of players	High market saturation	Medium market saturation	Low market saturation
Market growth rate	Stagnation or decline	Slowdown	High growth
Differentiation level	Standardized service	Standardized by key properties	Strong differentiation
Price limitations	Impossibility to raise prices	Increase of prices in order to compensate the growth of costs	Possibility to raise prices
Total	8 out of 12		
4	Low level of rivalry		
5-8	Medium level of rivalry		
9-12	High level of rivalry		

Based on data presented, we can conclude, that the present competition on a Moscow market is medium. However, because of medium saturation and positive growth rate, the number of mini-hotels are expected to increase.

2.4.3. Threat of new entrants.

In order to measure the threat of new entrants we evaluate the entry barriers that include: strong brands, service differentiation, investment size, distribution channels, industry growth rate[1].

---

[1] Strategic management course

Mini-hotels are predominantly individual, there are few chains in Moscow, consisting of 2-10 hotels. For example, “Hotel-hol” chain has 8 hotels, Flamingo chain has 9 hotels etc. Frequently, the hotels of one chain are situated close to each other in one district. There are no strong brands on mini-hotels market.

The service differentiation level is expressed in hotel’s purpose. Every hotelier can create something unusual, but still mini-hotels have similar set of services provided.

Mini-hotel business is very attractive for entrepreneurs because of rather small investments, short payback period and high profitability. For example, if you want to open a mini-hotel for 50 rooms in Moscow and buy a building, you need nearly 50 million RUB and the payback period will be approximately 5-6 years [47]. Without buying a building, the payback period is shorter and due to Moscow price level, such perspective is considered good for businessmen. However, there are many mini-hotels, which are closed before receiving the first profit.

In contrast with big hotel chains, mini-hotels have problems with distribution because of unawareness of their service. Most mini-hotel managers conclude contracts with travel agencies or have oral agreement with brokers on transport hubs (railway stations, airports etc.). With appearance of aggregators (Booking.com, Trivago.ru) the contact with individual guests and informal groups became closer. Now the hotel can save money from advertising and attract clients by means of good ratings on these websites.

According to experts, the industry growth rate in Moscow was 7,6% in 2016 and the forecast is 10,2% in 2017 [54]. The increase is expected to reach by Midscale and Economy segments. So, it is evidenced, that Moscow hotel industry goes up and develops.

The table with assessed factors is the following:

Table 6. Threat of new entrants.

Factor	**3**	**2**	**1**
Strong brands	Do not exist	2-3 players hold 50% of market	2-3 players hold 80% of market
Service differentiation	Low differentiation level	Niches exist	All niches are occupied by players
Investment size	Small (1-3 months payback period)	Medium (6-12 months payback period)	Large (more that 1 year payback period)
Distribution channels	The access to channels is opened	The access to channels requires some investments	The access to channels is restricted
Industry growth rate	High	Slowdown	Stagnation of decline
Total	13 out of 15		
5	Low level of threat of new entrants		
6-12	Medium level of threat of new entrants		
13-15	High level of threat of new entrants		

Based on data presented, we can conclude, that the situation for entry of new players is favorable. There are no strong brands among mini-hotels in Moscow, the growth rate is positive and distribution channels became more accessible. Nevertheless, the investments in business remain high and there is a risk of closing before payback.

2.4.4. Bargaining power of buyers.

The bargaining power of buyers is analyzed by means of: the share of wholesale customers, tendency to switch to substitutes, price sensitivity, level of dissatisfaction of the clients.

Package tour is "a holiday at a fixed price in which the travel company arranges your travel, hotels and sometimes meals" [70]. In its turn, individual tour is made by traveler himself: he buys air tickets, book hotel and organize leisure separately. Currently, the share of package tours in Moscow declines gradually, while in 2014, individual tours accounted for 47% and now they started to increase [74]. Online hotel and avia-aggregators contribute it, facilitating the procedure of trip planning.

As stated at the outset, there are many substitutes, which can be used for accommodation in Moscow. Surely, the most budget way is to stay at relatives' (friends') house or a hostel. With the developing of hostel industry, many tourists prefer narrower set of services with special atmosphere and introduction to the cultural environment of the country. From the other hand, mini-hotels lose in comparison to big hotels, where you can get additional services like gym, bar, restaurant etc. Just because of this fact, the customers are very sensitive to price[2].

To assess the level of satisfaction, the booking websites can be used. The average grade on Booking.com is 7-7.5, which is good for mini-hotels with few staff and services [59].

Table 7. The power of buyers.

Factor	3	2	1
Share of wholesale customers	A Few customers hold more than 80% of	A small part of customers hold 50% of sales	The sales are distributed among all

[2] The issue will be fully covered in 3rd chapter.

	sales		customers
Tendency to switch	The analogues exist	The service has distinctive features important for customers	The service is unique
Price sensitivity	The customer will always switch to cheaper service	The customer will switch only with a significance price difference	The customer is not sensitive to price
Level of dissatisfaction	The dissatisfaction with the key properties of service	The dissatisfaction with secondary features of service	Complete satisfaction
Total	9 out of 12		
4	Low level of buyers' power		
5-8	Medium level of buyers' power		
9-12	High level of buyers' power		

Based on data presented, we can conclude, that the power of buyers is high. It is common case for the whole service industry, where the client is always right. With the high tendency to switch to substitutes and price sensitivity, mini-hotels' managers have to find ways to attract customers.

2.4.5. Bargaining power of suppliers.

The bargaining power of suppliers is measured by the number of suppliers, the limitation of resources, switching costs, the significance of industry for suppliers.

There are many companies on Russian market, which supply hotels with furniture, linens, food etc. Big hotels cooperate with luxury suppliers, while mini-hotels and hostel search for the cheapest variant, so there is no lack of resources and the switching costs are low. Most of the companies specialize in HoReCa (hotels, restaurants and catering) or cover only hotels.

Table 8. The power of suppliers.

Factor	2	1
Number of suppliers	Limited number of suppliers	Wide choice of suppliers
Limitation of resources	Limited resources	Unlimited resources
Switching costs	Large costs	Small costs
Significance of industry	Low priority for suppliers	High priority for suppliers
Total	4 out of 8	
4	Low level of suppliers' power	
5-6	Medium level of suppliers' power	
7-8	High level of suppliers' power	

Based on data presented, we can conclude, that suppliers have a little impact on mini-hotels because of their diversity and strong significance of the industry.

Overall, the industry of mini-hotels is developing and the biggest threats are substitutes, new entrants and buyers. The rivalry among existing competitors is medium and power of suppliers is low.

2.5. Conclusions on the second chapter.

The mini-hotels sphere will possibly be a leader of hotel industry or, at least, increase the share of the market. It will be reached by increasing the attractiveness of Moscow as tourist destination and government support

Russia, and especially Moscow, becomes an attractive destination for foreign guests, mostly from Asia. Despite the stringent political situation in the world, there are many international events, which were and will be held in Russia and involve tourists. Confederations Cup Russia 2017 and FIFA World Cup 2018 will take place in several Russian cities and now each hotel, which wants to host officially, should pass the certification. It allows to increase the quality of hotel service.

However, there are some problems, which inhibits the mini-hotels activity. First, the lack of resources. The initial investments are high for small entrepreneurs and the sales in the first year are limited, because of unawareness and mistrust to new hotel. Moreover, the problem of mini-hotels is the lack of money for promotion. As mentioned earlier, online aggregators made the promotion easier, but for hotel beginners the cost of cooperation is still high. For example, Booking.com gets only a commission from each room. New hotels sell few rooms and the commission in comparison with costs is high.

Secondly, the absence of brand. Big hotels that work under a franchise or a license, do not need to build a name and seek for first clients, due to the high level of the global brand awareness. Tourist, who visited Hilton in France, will be sure about Hilton in Germany because of common standards. Yet, mini-hotel without reviews raises suspicions. You never know, what you will see in no star hotel in a dwelling house, so managers spend many resources for creating a reputation.

Thirdly, the lack of qualified staff. This issue is common for the whole Russian hotel market. While Europeans pay thousands of euro to study hospitality in Switzerland to have a prestigious profession, Russian students get bachelor degree in this sphere, because the entrance requirements are lower, than for economic or technical specializations. There are few leading universities, which produce highly qualified personnel and such students start working in big hotels. In mini-hotels, one person should do the work for 2-3 people and get one low salary (~30000 RUB) [57].

Fourthly, there is no big trust for small hotel either from clients or banks. It is hard to get a loan for a mini-hotel, as it is very risky because of small sales [3]. All in all, the number of mini-hotels in Moscow grows rapidly and the government helps small business to recoup costs.

In the next chapter, the analysis of customer attitude to mini-hotels in Moscow will be provided.

CHAPTER 3. THE RESEARCH OF CUSTOMERS' PREFERENCES FOR MINI-HOTELS AND INTEREST IN LOYALTY PROGRAMS.

3.1. Research methodology. Type of research.

The aim of the study was to figure out the necessity of loyalty program implementation in Moscow mini-hotels. Several objectives were set in order to achieve the goal:

1. To assess the frequency of visiting Moscow.
2. To measure the share of people, preferring mini-hotels to other accommodation types and the reason for it.
3. To find out the attitude to the loyalty programs and their importance to customers.

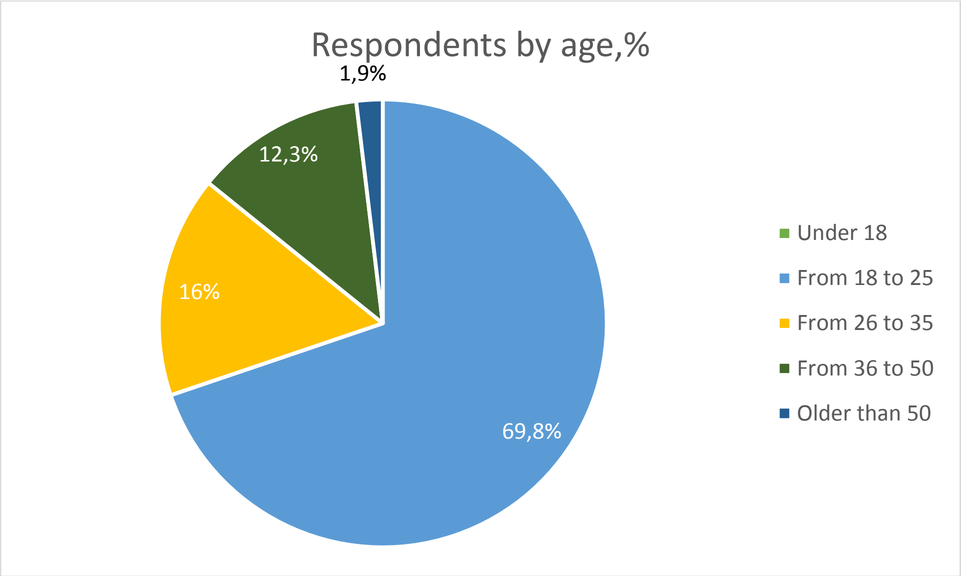
The research is quantitative, as we need to assess the quantitative values of the studied indicators and reveal the trends, proven by statistics. The data was obtained by means of online survey in Google forms [Appendix 4]. This is the most common method of sociological research and the most used method of information gathering. It helps to easily cover data on people, which are from different cities and have different demographic and social characteristics, to make the results relevant. The questionnaire consists of 15 questions, but depending on the answer, the quantity may vary. First question (How often do you visit Moscow?) allows to select people, who could not provide the answers for the following questions and exclude them. It is needed to interview people, who visit Moscow with some regularity, so we can track the frequency of choosing the mini-hotels. Nevertheless, their answers allow to assess the share of people, who do not visit Moscow at all.

3.2. Sampling method.

In this research, people of all ages and social characteristics, who visit Moscow regularly and do not live in Moscow, were considered as general population. The sample is random, however, there was an element of "snow-ball" sampling method. Many of respondents engaged their friends in a survey, if they do not live in Moscow.

The target sample was 150 respondents, the real sample consists of 126 respondents (84% of the target). Next, the characteristics of respondents will be provided.

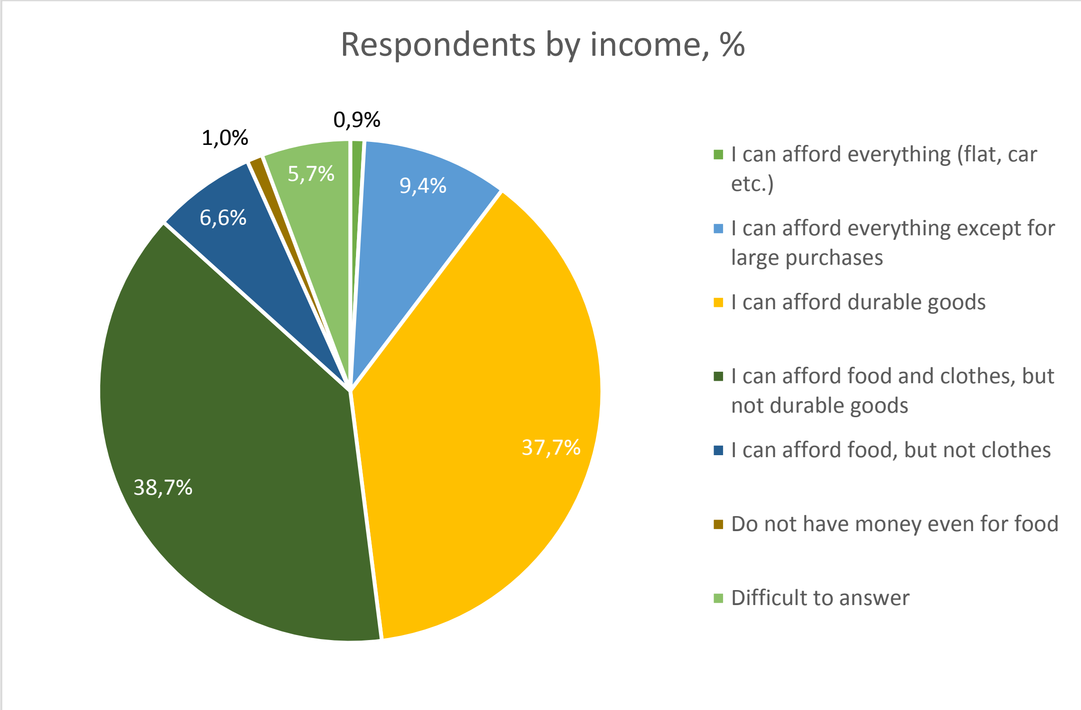
The respondents were characterized by age, income and current activity. (pic. 9-11):



Pic. 9. Respondents' distribution by age.

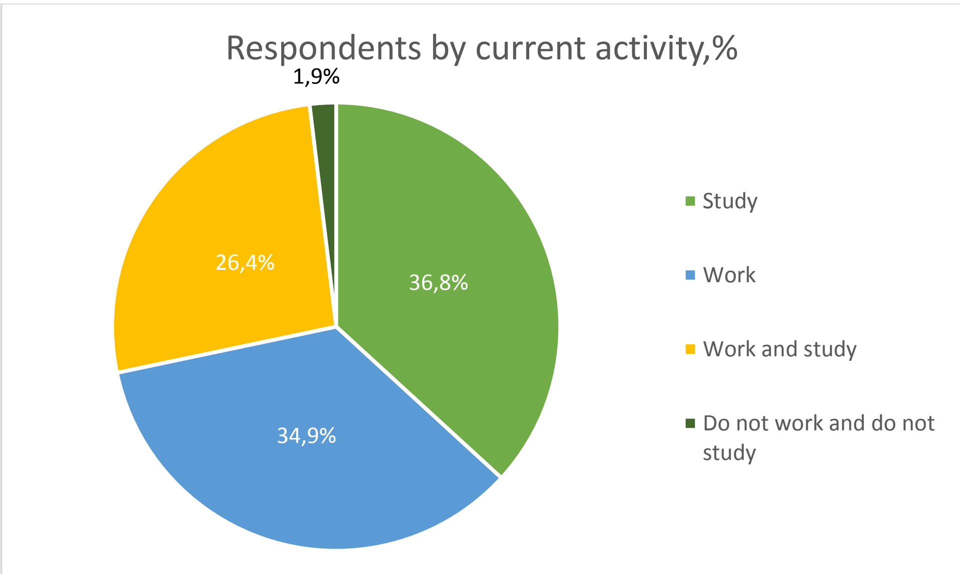
As it can be seen, the largest proportion refers to people from 18 to 25 (69,8%). They are considered as youth: students and recent graduates. Respondents of the age from 26 to 35 have 16% and respondents of the age 36 to 50 have 12,3 %. The smallest share is for people older than 50. There are no respondents under 18.

Such uneven distribution can be a problem for results interpretation. As mentioned in chapter 2, students choose hostels for many reasons. So, the respondents of this age will rather prefer hostels to mini-hotels and it can be regarded as a preference of a general population.



Pic. 10. Respondents' distribution by income.

As it can be seen on the pie chart, there are two approximately equal groups of respondents: who can afford durable goods and who can afford food and clothes, but not durable goods. The share of people with high income ("I can afford everything", "I can afford everything except for large purchases") is only ~10% (0,9% and 9,4% respectively). The respondents, who can afford only food, have 6,6%. Needless to say, that 5,7% of respondents could not assess their income or did not want to do it.



Pic. 11. Respondents' distribution by current activity.

The shares of respondents by current activities are approximately equal. Most of respondents study (36,8%). People, who work, have 34,9%. Respondents, who study and work, have 26,4%.

3.3. Research findings.

The frequency of visiting Moscow.

The first question was asked to assess the frequency of visiting Moscow and exclude people, who do not come to the capital of Russia and cannot share their opinion about staying in Moscow (pic. 12).

Pic. 12. Respondents' distribution by the frequency of visiting Moscow.

As it can be seen from the pie chart, most of people visit Moscow less than once a year (27%). 19,8% of people come to Moscow only once a year. Approximately equal proportion of respondents visit Moscow several times in a half a year: once – 11,1% and 2-3 times – 11,9%. People, who visit Moscow once or more than once a month, accounted together for 14,3%. However, the share of respondents, who do not visit Moscow is quite big: 15,9%. In this way, 20 respondents were excluded from the following questioning.

From this graph we can conclude, that not so many people visit Moscow frequently, so the most of tourists come once or twice in a few years.

Mini-hotels in Moscow.

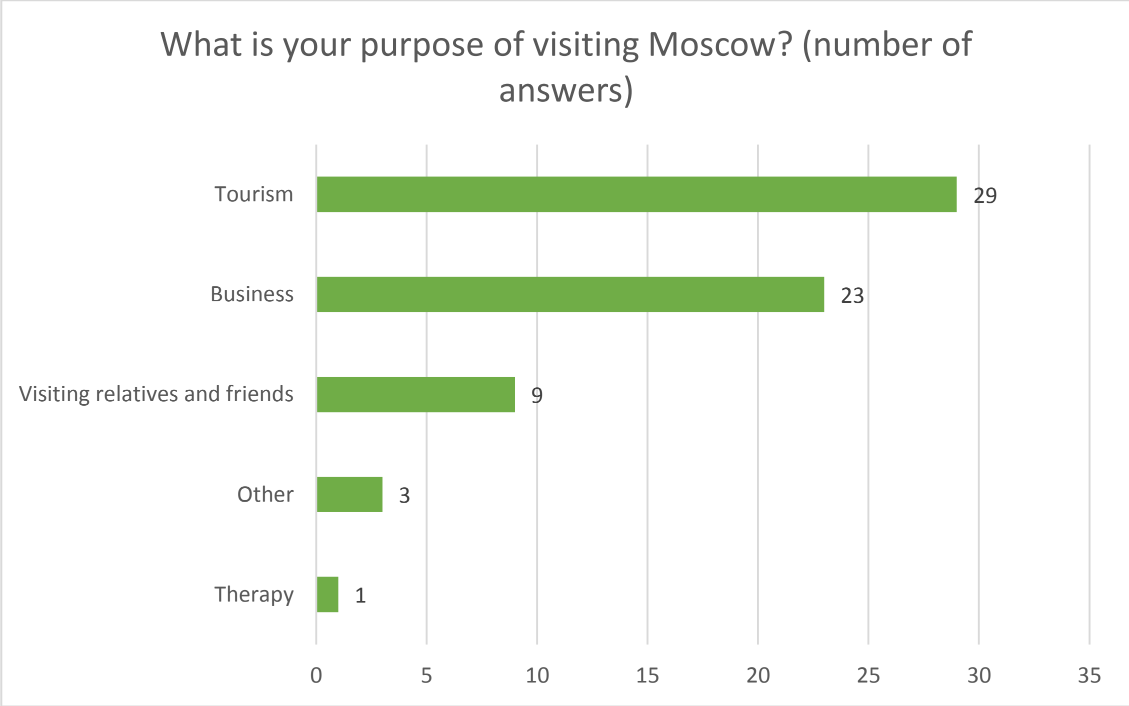
Respondents, who visit Moscow regularly, were asked whether they ever stayed at mini-hotels there (pic. 13).

Pic. 13. Respondents' distribution by accommodation preferences.

Mini-hotels are used less than other accommodation types (40,6% against 59,4%). Next, respondents were asked about the reasons of choosing hostels, big hotels, flat rent or relatives' houses to stay (if they answered "No") or the purpose of coming to Moscow, so we can define the target audience of mini-hotels.

The reasons for coming to Moscow.

The four main variants of reasons were offered: business, tourism, visiting relatives and friends, therapy. Moreover, respondents could name their own reason. Multiple response was assumed.

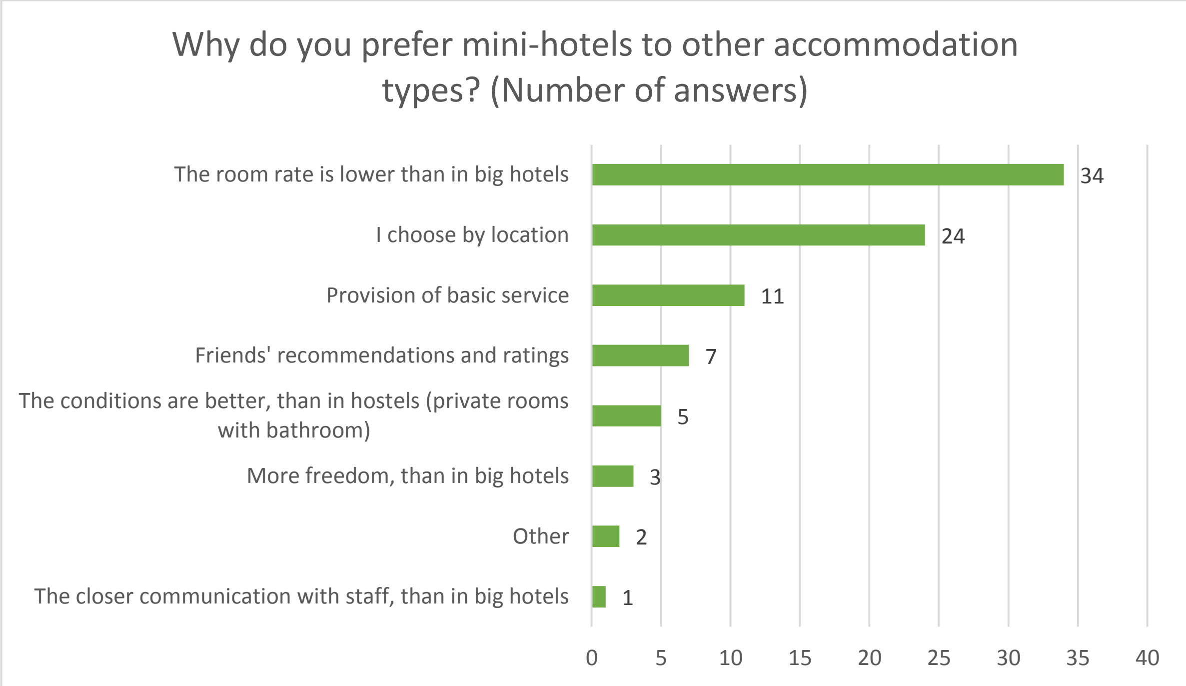


Pic. 14. Respondents' purposes of visiting Moscow.

As it can be seen, the most popular reason of coming to Moscow is tourism and business (29 and 23 answers, respectively). Visiting relatives and friends was chosen only 9 times and therapy was chosen once. For other reasons respondents pointed out study, concert tours and visiting old friends, which should refer to the "visiting relatives and friends".

The reasons of staying at mini-hotels.

Respondents were asked why they prefer to stay at mini-hotels. Multiple response was assumed (pic. 15).

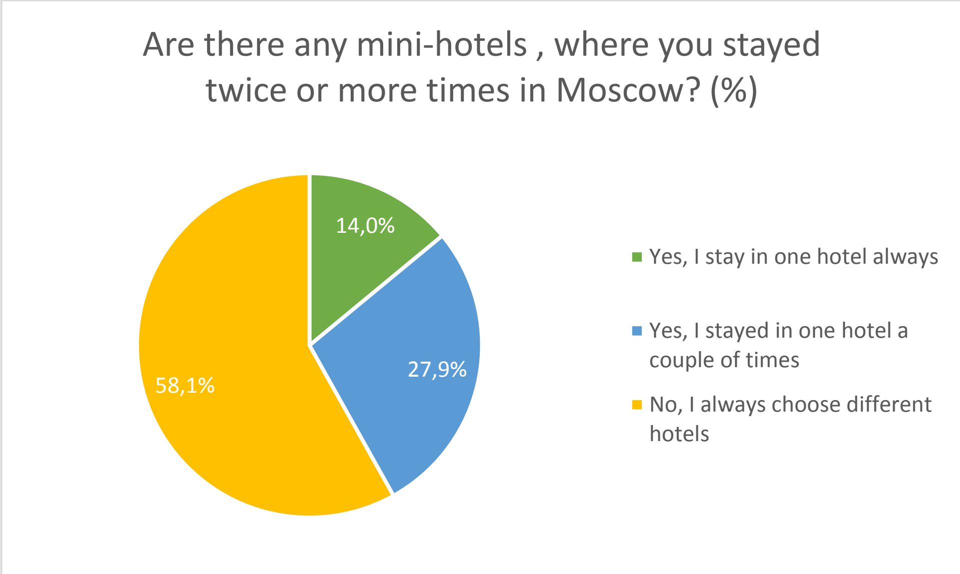


Pic. 15. Respondents' reasons for choosing mini-hotels.

The most common reason for choosing mini-hotels is room rate (34 answers). The location was chosen 24 times, because mini-hotels are small and they easily can be implemented into city and not break the historical integrity. Also, respondents chose basic services as an advantage of mini-hotels (11 answers), which is connected to the lower price in comparison to big hotels. On the other hand, recommendations (so called, "word of mouth") are less significant to people (7 answers). The advantage of mini-hotels to hostels was highlighted only 5 times, so we can conclude that hostels are preferred by tourists as much as mini-hotels. Weak control and closer communication with the staff had 3 and 1 answer, respectively. For other reasons respondents pointed out limited budget for business trip and home atmosphere of mini-hotels.

Repeated staying in mini-hotels.

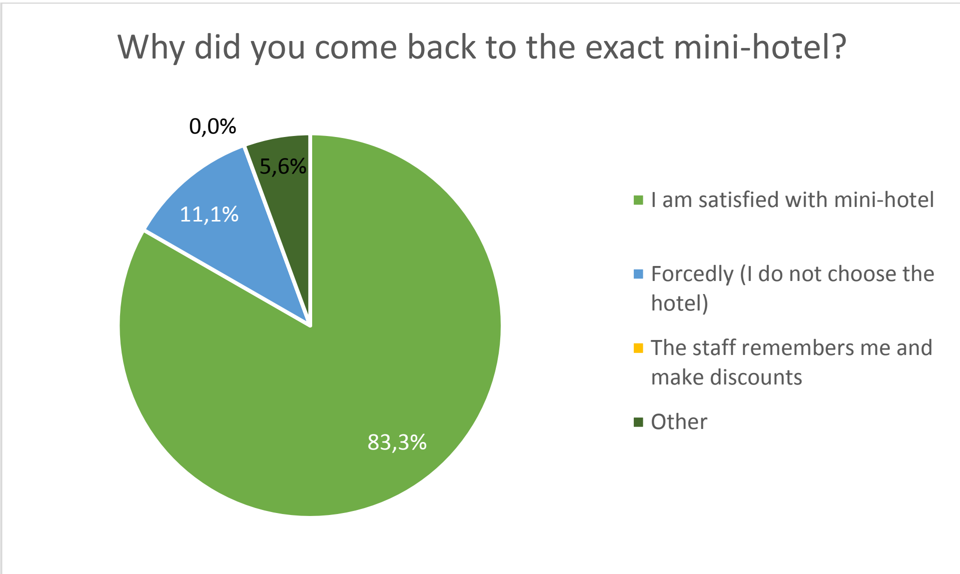
Repeated purchases are the element of behavioral aspect of loyalty, so it was necessary to assess, how often people come back to the exact mini-hotel.



Pic. 16. Repeated purchases in mini-hotels in Moscow.

From the pie chart, we can conclude, that mini-hotels are used once and guests never come back again. 58,1% of respondents choose different mini-hotels every time. It refers to priority of the location and the possibility to choose the closest mini-hotel, if the location is not permanent. 27,9% of respondents stayed at one mini-hotel several times and 14% of respondents always stay at the same hotel in Moscow.

People, who chose the repeated purchase, were asked to name the reason for it.

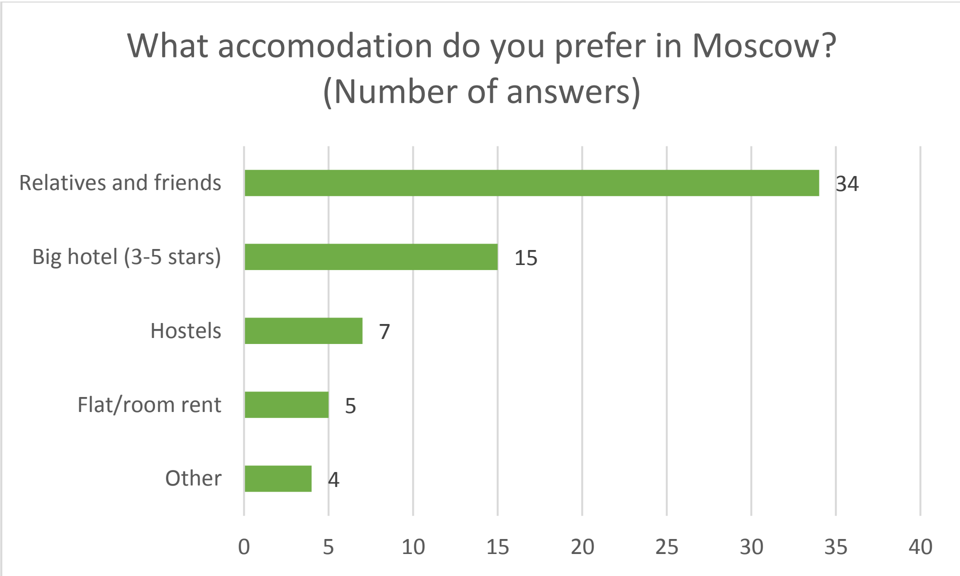


Pic. 17. Respondents' reasons for repurchasing.

Most of respondents are satisfied with the service (83,3%). Two possible reasons for it are basic service only, provided in mini-hotels, and price-quality ratio. Some respondents did not choose the hotel by themselves, so the repeated purchase was forced (11,1%). For other reasons (5,6%) respondents pointed out the location and quiet.

The types of accommodation in Moscow.

As stated earlier, 59,4% of respondents choose other accommodation types in Moscow, so they were asked to name and state the reason to choose them. Multiple response was assumed.



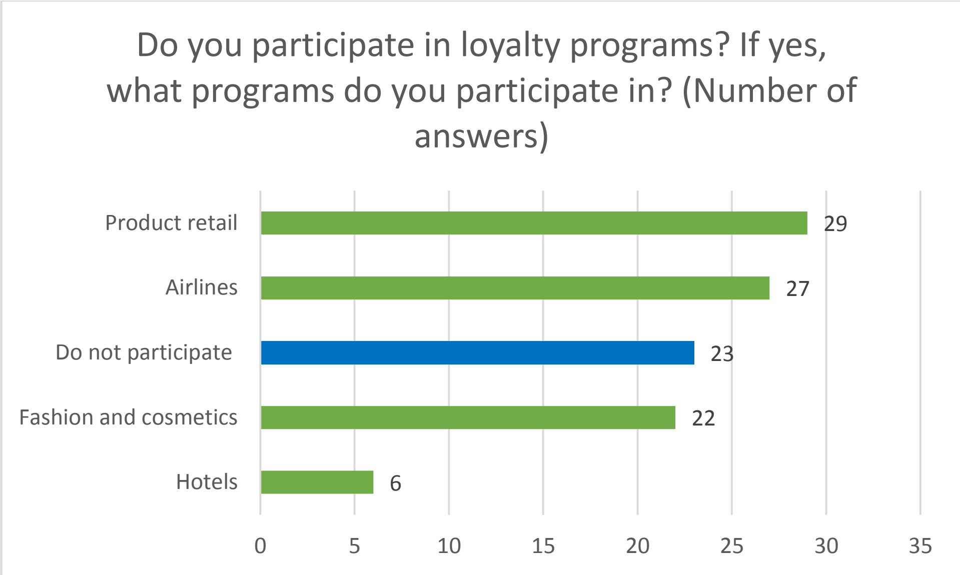
Pic. 18. Respondents' preferences for accommodation types.

Most of answers (34) referred to informal accommodation at friends' houses. Big hotels were chosen 15 times, hostels – 7 times, flat/room rent – 5 times. For other types (4 answers) respondents pointed out dormitories or apartment, provided by company and own flat. One respondent said, that he did not stay in Moscow at night.

The open question of the reasons of choosing other accommodation types showed, that staying at friends' houses is the most preferable, because it is free and more comfortable. The hostels are chosen because of nice atmosphere and the lowest rate. Big hotels are chosen because of their comfort and high level of service. Some respondents said, that they do not choose the accommodation themselves.

Participation in loyalty programs.

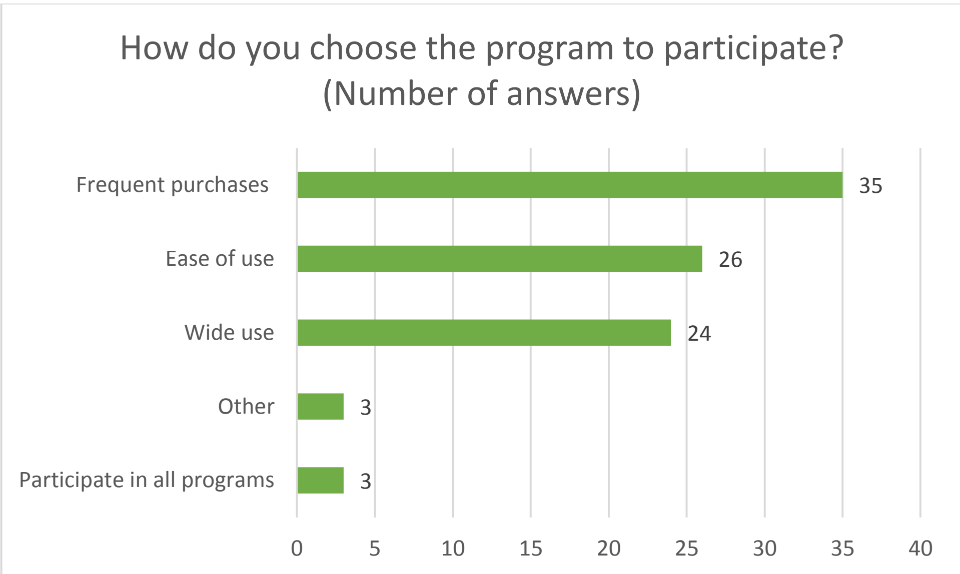
All respondents, who were not excluded after the first question, were asked about their participation in loyalty programs. Multiple response was assumed.



Pic. 19. Respondents' participation in loyalty programs.

The most popular answers were "product retail", "airlines" and "fashion and cosmetics" (29, 27 and 22 answers, respectively). The hotel loyalty programs were chosen only 6 times, so we can conclude, that they are not as popular as products and airlines. However, there were 23 answers "do not participate", which evidenced that many people do not use loyalty programs at all, so they were asked about the reasons. Many respondents said, that they were not offer to participate or do not know, what is it, or do not travel a lot.

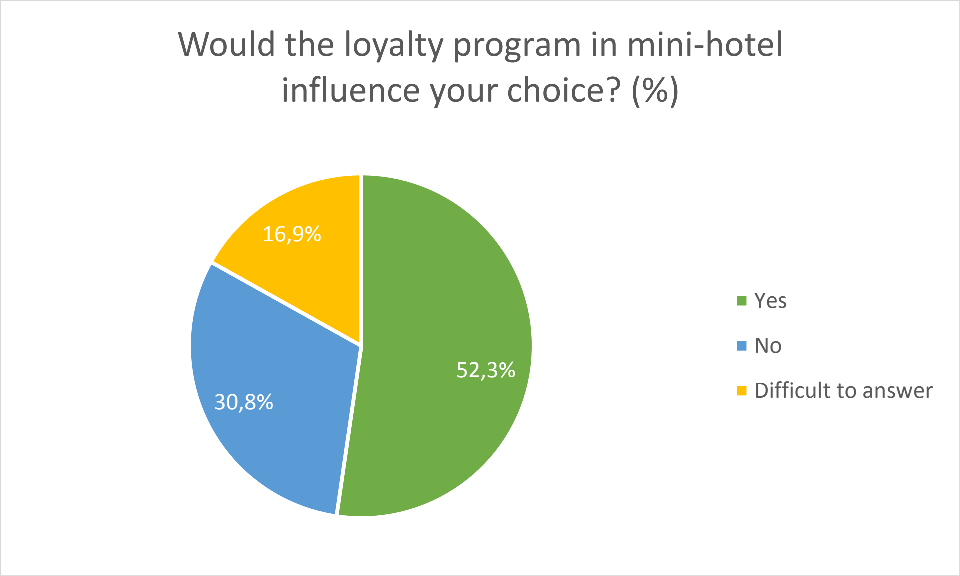
Respondents, who use loyalty programs, were asked, how they choose them. Multiple response was assumed.



Pic. 20. Respondents' reasons for choosing the loyalty program.

The frequency of purchases is the key factor to choose a loyalty program (35 answers). The ease and width of use are also important (26 and 24 answers, respectively). Some people participate in all programs offered (3 answers).

All respondents were asked, whether the loyalty program in mini-hotel impacts their choice.



Pic. 21. The influence of loyalty program in mini-hotel.

Nearly the half of respondents said "yes" (52,3%), one third of respondents said "no" (30,8%) and 16,9% of respondents are not sure. Thus, we can conclude, that well-built loyalty program can attract customers and persuade to re-purchase.

3.4. The limitations of the study.

Although the research was carefully prepared, I am still aware of its limitations and shortcomings.

The sample size is not quite big for the market research (126 respondents) and it did not reach the target figure (150 respondents). On the one hand, the short period of time contributed the limited quantity of answers. The research was conducted from 13th of April till 10th of May 2017. On the other hand, my living in Moscow, implies the involving the people, which mostly live in Moscow, so they could not be respondents. There was much time spent on searching for respondents.

Finally, the research is conducted by the author herself, so it can be rather subjective.

3.5. The conclusions on the third chapter.

Overall, the research shows, that few people visit Moscow regularly. Still, most of people prefer informal accommodation at relatives' houses, which allows to save money. It is evidenced by the decrease in real incomes of Russians, because of currency ratio, which results in the lack of money to travel.

Mini-hotels remain something unclear for tourists, because it is more expensive, than hostels, and provide less service, than big hotels. However, business tourists prefer mini-hotels because of basic services and possibility to choose the closest mini-hotel to the necessary location.

Loyalty programs are popular among Russians; however, a few people use them in hotels, because of rare trips. Based on data received, we can measure customer loyalty by models, considered in the first chapter. Considering the Customer's Loyalty ladder (Wilton), the guests of mini-hotels in Moscow refer to the 3rd stage – customers. They come only once and the probability of repurchase is small.

According to Dick and Basu's matrix, the customers of mini-hotels show no loyalty. The research showed, that a few respondents participate in hotel loyalty programs and choose mini-hotels by price, location, but not by brand, staff etc., so we can conclude, that their relative attitude is low. The repeated patronage is low, too, as less than a half of the mini-hotels' customers (41,9%) come back again at least one time.

Analyzed customers by W. Reinartz and V. Kumar's matrix, we are sure, that most of customers refer to strangers because of short-term stay and low profitability, because of limited services offered.

Method of needs division help to assess loyalty by behavioral aspect. As stated above, the share of people, who repurchase in the exact mini-hotel at least once, is 41,9%, which is less than “ideal” 67% (according to Aaker’s theory. It evidence, that the customers are not loyal.

The conversion model (J. Hofmeyr and B. Rice), in spite of its abstractness, confirms the received results. The satisfaction is quite high (83,3%): people return to the mini-hotel because of their satisfaction with it. However, the preference of alternatives is high, too. 59,4% of respondents choose hostels, big hotels etc. instead of mini-hotels. Brand choice importance does not exist, because mini-hotels are chosen by location and price and not by attitude to the brand.

It is difficult to assess accurately customers of mini-hotels by Fuji-Xerox approach, because there is a lack of correlation between satisfaction and loyalty. Despite the high level of satisfaction (83,3%), the customers of mini-hotels are in indifferent zone, rather than in favorable, because participation in hotel loyalty programs is low (6 answers against 29 answers for product retail).

Next, we move to general conclusions and recommendations depending on the distinctive features of customers in mini-hotels.

CONCLUSION.

Based on the research conducted, we can conclude, that there are positive prospects for mini-hotel industry in Moscow. First, the tourist flow in Russia and, in particular, Moscow, is increasing over the last few years. The currency ratio and the interest to our country contribute to it.

As stated earlier, the economy segment, which includes mini-hotels, is expected to grow. There are many international events, which will take place in Moscow soon. Confederations Cup Russia 2017 and FIFA World Cup 2018 will influence the hotel industry in Moscow. On the one hand, it will help to improve the quality of existing non-brand hotels by means of certification. On the other hand, it will give the impetus to the development of mini-hotel industry. Most of foreign tourists will stay in hostels and mini-hotels rather than in big hotels, because it is cheaper. Mini-hotels, which pass the certification, will get the access to the huge tourist flow and gain revenue for future development.

The positive dynamics of the market lead us to the possibility of building marketing strategy in mini-hotels. However, there are several problems, described earlier, which can result in inefficiency of loyalty programs in mini-hotels. The absence of brand name and the separation of each mini-hotel (i.e. without chains) lead to customers' refusal to repurchase. They can easily switch to other mini-hotels, that do not have any distinctive features except for price or location. Despite the fact, that repeated purchases are not equal to loyalty, they are significant in order to analyze the satisfaction of customer. If the customer does not want to come back in the hotel, because he is not satisfied, he does not need a loyalty program.

Loyalty program implementation as an element of marketing strategy requires initial investments such as partnership agreements (for coalition loyalty programs), launching computer system for the accounting or turnkey services. Mini-hotel with unstable revenue could not afford extra expenses.

Not only lack of resources and brand name prevent mini-hotels in Moscow from loyalty program introduction. The research showed, that people prefer the substitutes to mini-hotels, such as informal accommodation at relatives' houses and hostels. Both of them are much cheaper and more interesting for travelers. It is difficult to name the customers loyal to mini-hotels in Moscow, because of brand absence. However, there is a positive trend in building loyalty system on Moscow market.

There are some recommendations proposed to mini-hotel managers, based on analysis conducted. First, it is necessary to create a brand of a mini-hotel by highlighting its distinctive features besides price and location. It will encourage people to stay there again. For instance, it could be a special atmosphere for travelers: maps, books about countries, special culture events. Additionally, it is possible to determine the purpose of stay in the hotel. If the mini-hotel is situated in the business center of Moscow, it could focus on business tourists and offer not only bed, but free Wi-Fi, computers, printers etc.

The research showed, that people want to participate in widely used loyalty programs. This problem is solved by building of mini-hotel chains or merger of several separate hotels. It will help to reduce costs due the economies of scales and increase the brand awareness on Moscow mini-hotel market. To improve the loyalty of foreign tourists, it will be profitable to conclude partnership agreements with Saint-Petersburg mini-hotels, because it is standard route for foreigners.

Many hotels refuse to launch loyalty program because of the costs they incur. Managers will just make a discount for regular customers, rather than use loyalty program. To save resources, but get loyal customers, managers could make agreements with additional services such as taxi, cafes nearby, Moscow excursions. There is bigger probability, the customer will come back again, if he knows, that he is supported by all facilities needed.

All in all, Moscow hotel industry still needs developments and improvements. Mini-hotels' segment could possibly become a leader of the market.

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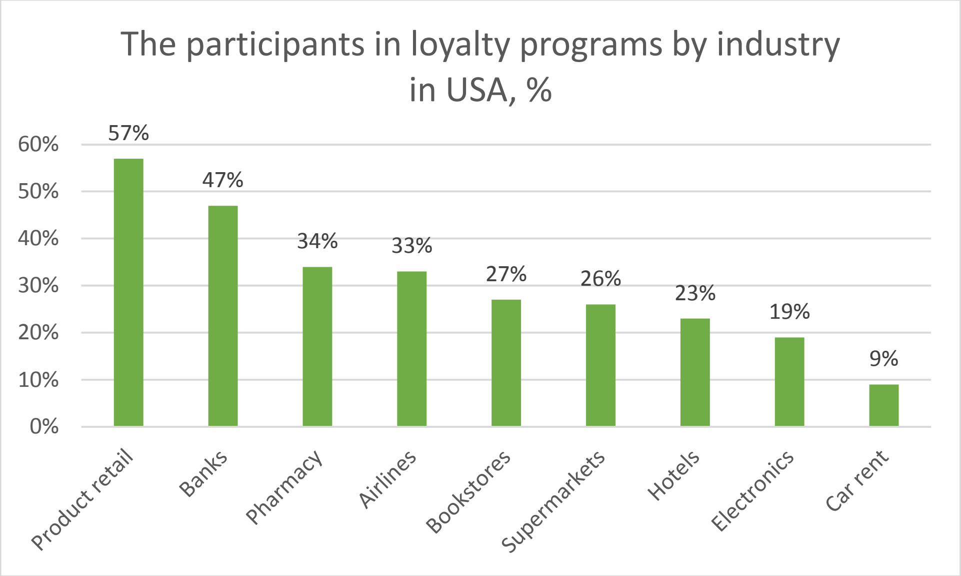
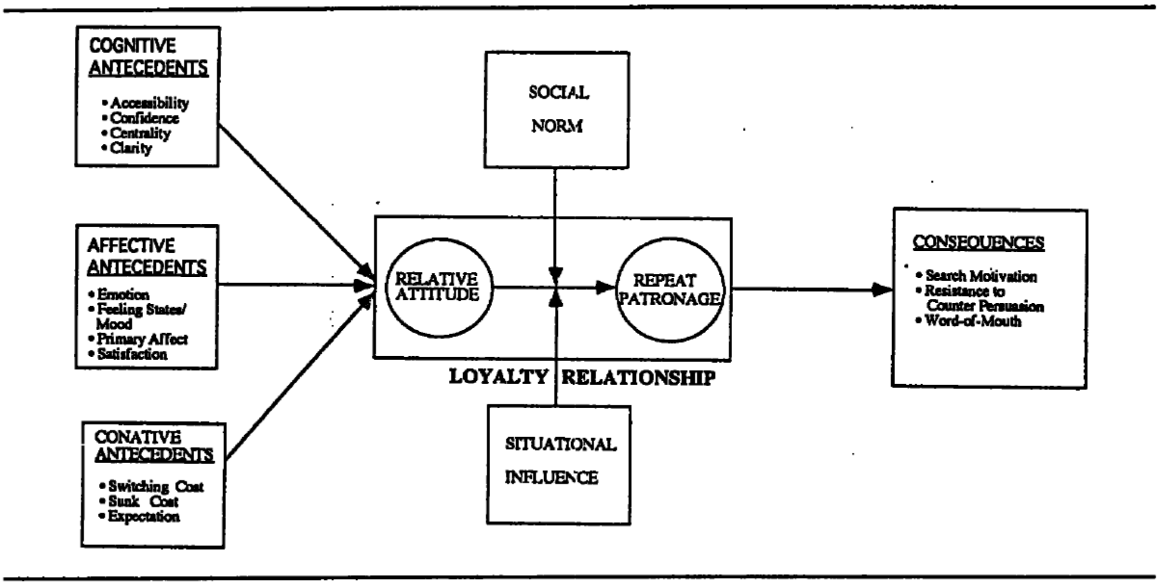
APPENDIXES.

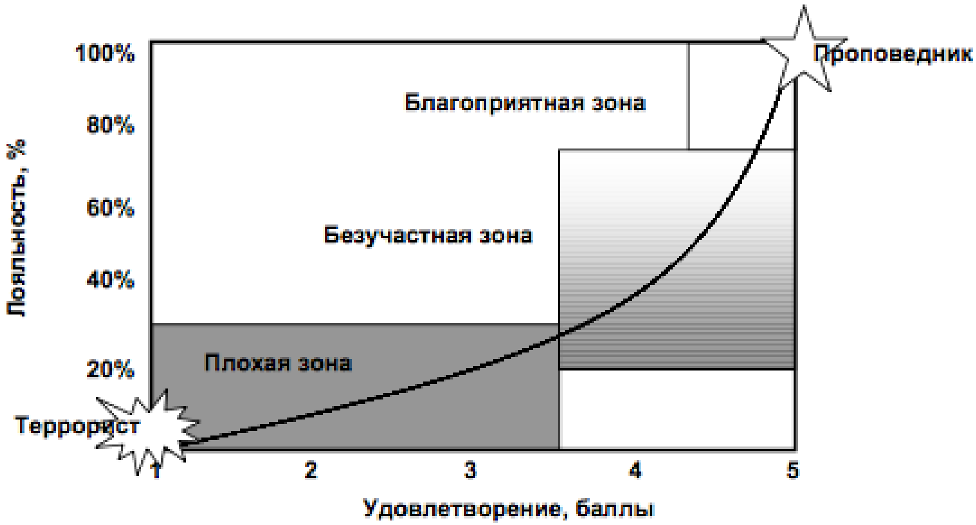
Appendix 1. Number of participants in loyalty programs in USA [67].



Appendix 2. A framework for customer loyalty.



Appendix 3. Fuji-Xerox loyalty model.



Appendix 4. The questionnaire for the survey.

Пребывание в Москве.

1. **Как часто Вы бываете в Москве?**

- Реже раза в год
- Раз в год
- Раз в полгода
- 2-3 раза в полгода
- Раз в месяц
- 2-3 раза в месяц
- Чаще 2-3 раз в месяц
- Не бываю в Москве (закончить опрос)

Услуги мини-отелей в Москве.

2. **Пользовались ли Вы когда-нибудь услугами мини-гостиниц (до 15 номеров) и малых отелей (от 16 до 50 номеров) в Москве (не хостелы)? (фильтр)**

- Да
- Нет, пользуюсь другими средствами размещения (перейти к блоку «Размещение в Москве»)

3. **По какой причине Вы приезжаете в Москву? (множественный выбор)**

- Командировки
- Туризм
- Посещение родственников
- Лечение
- Другое (указать)

4. **Почему Вы останавливаетесь именно в мини-гостиницах и малых отелях? (множественный выбор)**

- Цена за ночь ниже, чем в больших отелях
- Сервис лучше, чем в хостеле (свой душ и туалет)
- Отсутствие дополнительных услуг, включенных в стоимость
- Рекомендации знакомых и рейтинг сайтов-агрегаторов (например, Booking.com)
- Выбираю по месторасположению
- Более близкое общение с персоналом, чем в больших отелях
- Больше свободы, чем в крупных отелях
- Другое (указать)

5. **Есть ли в Москве мини-гостиницы (до 15 номеров) и малые отели (от 15 до 60 номеров), в которых Вы были 2 и более раз?**

- Да, всегда один и тот же отель (сеть)
- Да, был пару раз в одном и том же отеле (сети)
- Нет, всегда живу в разных отелях

6. **Если Вы ответили ДА на предыдущий вопрос, почему Вы повторно воспользовались услугами отеля?**

- Вынужденно (отель выбираю не я)
- Отель удовлетворяет все мои предпочтения

- Персонал меня запомнил, делает комплименты
- Другое (указать)

Перейти к блоку «Участие в программах лояльности»

Виды размещения в Москве.

7. **Какой вид размещения Вы предпочитаете в Москве? (выбрать до 3 позиций)**
- У родственников/знакомых
- Снимаю квартиру/ комнату посуточно
- Крупный отель (сеть отелей) 4-5 звезд
- Хостелы
- Другое (указать)

8. **Почему Вы предпочитаете данные виды размещения мини-отелям?**
   Открытый вопрос

Перейти к блоку «Участие в программах лояльности»

Участие в программах лояльности.

9. **Участвуете ли Вы в программах лояльности (бонусы/мили, скидки, экстра-ночи и т.д.)? Если да, то каких? (множественный выбор)**
- Авиалинии
- Отели
- Продуктовые магазины
- Одежда и парфюмерия
- Не участвую в программах лояльности

10. **Как Вы выбираете, в каких программах участвовать? (не больше 3 ответов)**
- Простота использования и оформления
- Широкое использование (крупная сеть, присутствует во многих городах)
- Частые покупки в компании
- Подписываюсь на все программы подряд
- Другое (указать)

11. **Повлияло бы на Ваш выбор наличие в отеле программы лояльности (бонусы за ночи, скидки на такси и экскурсии)?**
- Да
- Нет
- Затрудняюсь ответить

Информация о респонденте.

12. **Сколько Вам лет:**
- Меньше 18ти
- От 18 до 25
- От 26 до 35
- От 36 до 50
- Старше 50ти

13. **Оцените, пожалуйста, уровень Вашего дохода:**
- Могу позволить себе все (в том числе крупные покупки (машину, дачу, квартиру)
- Могу позволить себе практически все, кроме крупных покупок

- Могу позволить себе товары длительного пользования (холодильник, телевизор и пр.)
- Денег хватает на еду и одежду, но покупки товаров длительного пользования затруднительны
- Хватает на еду, но покупка одежды проблематична
- Не хватает денег даже на еду
- Затрудняюсь ответить

14. В данный момент Вы:

- Учитесь
- Работаете
- Работаете и учитесь
- Не работаете и не учитесь