Assessing Service Quality in the South African Advertising Industry

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Abstract

Service excellence is recognised as a valuable company asset and an ideal way for service organisations to achieve competitive differentiation. For the most part, the fast paced and continuously changing business environment has forced many companies to reconsider service quality as a potent tool to enhance customer relationships, increase employee morale and productivity. However, due to the nature of services, attempts to achieve service quality require ongoing effort and commitment.

The research objective was to examine service quality in the South African advertising industry, identify the quality dimensions that are most important to advertisers, rank the dimensions in order of importance and make recommendations thereof. From the literature review, four research questions were identified and answered, through a modified SERVQUAL questionnaire, which was sent via e-mail to 100 marketers in the top 100 companies in terms of media spend.

The conclusion was that the advertising industry is not delivering the required service quality to advertisers in terms of their expectations as measured against the service quality dimensions. Advertising agencies should therefore devote more effort to improving service quality levels throughout the advertising industry in South Africa.

Declaration

I declare that this research project is my own work. It is submitted in partial fulfillment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University.

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Chapter 1   Introduction

Chapter one provides an introduction to the topic, why there is a need for such research and how the South African advertising industry will benefit from it. The research objectives and problems that the study will investigate are stated, the context of the research is made clear and the scope of the research is defined.

1.1 Background

In the past two decades, there has been a proliferation of literature on the effective management of service organisations. A major feature of this has been the comprehensive examination of service quality, which has been prominent in services literature since 1985 (Nel and Berthon, 1997). Service quality incorporates the concept of meeting and exceeding the expectations of the customer (Grönroos, 1984). In a 2002 global survey of 681 senior executives conducted by *The Economist*, 65 percent of respondents reported customers as their main focus over the next three years, compared to 18 percent who reported shareholders as their main focus (Gupta and Lehmann, 2005). Ensuring quality of service is thus vital for any organisation wishing to strengthen their relationships with customers, improve profits and grow market share.

This is specifically re
service quality is the crucial success element. Berry and Parasuraman (1993) note that service quality is the most essential factor for contemporary service companies who aim to compete in the global market, where competition is aggressive and customers are becoming more focused and demanding.

1.2 Problem definition

In South Africa, the Association for Communication and Advertising (ACA), as well as numerous advertising practitioners, are concerned about the perceived misalignment between advertisers' service expectations and advertising agencies' service delivery (ACA, 2004). Although many advertising agencies acknowledge the importance of the customer and have placed greater emphasis on delivery of service, anecdotal evidence suggests that advertisers are experiencing shortfalls in the quality of service offered.

The fast-paced and continually shifting business environment in South Africa has resulted in persistent rivalry, frequent client-agency realignment and reduced profit margins for the advertising industry. Nolutando Xate (2006, p.14) explains that this has been brought about by "a lack of trust between advertising agencies and their clients, combined with a lack of mutually beneficial partnerships between agencies and their clients."

According to the Financial Mail's Adfocus Agency Executive Opinion Survey, 75% of respondents indicated that advertising agencies could do more to understand their clients' business (Maggs, 2006a). Other studies have revealed that advertising agencies are becoming the weakest link in the marketing chain as they are unable to deliver what advertisers want (Crain, 2004). Consequently, advertising agencies are under considerable pressure to pay more attention to meeting the needs and expectations of their clients.

The local advertising industry is not unique in this respect. In South Africa, the service sector accounts for approximately 67.1 percent of GDP (Statistics SA, 2006) with many service companies facing the threat of increasing competition brought about by deregulation, market maturity and declining profitability. Seth, Deshmukh and Vrat (2005) note that globalisation and liberalisation are affecting economies around the world, and organisations are therefore changing from profit maximisation to maximising profits though customer satisfaction. For this reason, an increasing number of businesses are channeling more effort into retaining existing customers rather than seeking new ones (Bhat, 2004).

As service organisations become increasingly customer focused and driven by customer demands, the need to meet customer's expectations and retain their loyalty becomes more critical. As a result, the most successful service firms aim to differentiate themselves on the basis of high service quality.

1.3 Importance of the research

The impact of service excellence on advertising agencies cannot be underestimated. Quester and Romaniuk (1997, p. 180) state that "termination of established agency-client relationships is the expected outcome of inadequate service quality for advertising agencies." In 2004, an ACA study on the future of the advertising industry revealed that 32 percent of advertisers surveyed felt that agency service relationships were one of the industry's greatest weaknesses. An additional 26 percent of respondents indicated that their agency relationships were not very stable (ACA, 2004). This suggests that there is an opportunity for agencies to improve relationships with clients, and thus profitability, by focusing on service quality.

Although research has been conducted by the ACA into service quality in advertising agencies, the study only assessed the relative contribution of various attributes in determining advertisers' perceptions of overall satisfaction. No empirical studies have been conducted to determine which service quality dimensions have the greatest impact on an advertiser's likeliness to remain with an incumbent agency.

To improve service quality, the advertising industry needs to understand which service attributes influence advertisers' intentions. Failure to give sufficient attention to the significant attributes may result in an advertiser's negative evaluation of an advertising agency's service.

1.4 Benefits of service quality

It has been argued by several researchers that service excellence enhances a customer's inclination to repurchase, to purchase more and to become less price-sensitive while telling others about positive experiences (Venetis and Ghauri, 2004). Thus, the benefit of service quality for the advertising industry, apart from competitive differentiation, includes enduring customer relationships, favourable customer word of mouth, higher employee morale and greater productivity (Berry and Parasuraman, 1993).

1.5 Objectives of the research

Service quality is important in the advertising industry due to the very high levels of customer contact. The research objective was to examine the needs of South African advertisers by measuring and analysing the levels of service quality they receive from advertising agencies, identifying the service quality dimensions that are most important to them, ranking the dimensions in order of importance and making recommendations thereof.

1.6 The research

The purpose of this research is to identify opportunities for South African advertising agencies and employees to improve service quality within the industry.

The sub-problems associated with this research may be stated as follows:

- Establishing what advertisers' expectations are regarding service quality in the advertising industry;

- Establishing what advertisers' perceptions are of the service quality they actually receive;

- Determining the correlation between the service quality dimensions;

- Determining whether the advertising industry's service quality is at, above or below the perceptions of advertisers;

- Suggesting insights and recommendations to manage service quality within the industry.

1.7 Scope of the

The study concentrated on advertisers that used advertising agencies for their company's communication needs, i.e. Brand Managers, Marketing Managers and Marketing Directors. The population was drawn from companies listed in the Financial Mail Adfocus (2006) survey as the top 100 advertisers in terms of advertising expenditure.

For the purpose of this research, a quantitative research methodology was best positioned to address the research objective. A structured, self-administered questionnaire based on the SERVQUAL measuring instrument developed by Parasuraman, Zeithaml and Berry (1988) was sent to 100 marketers from the top 100 advertisers in South Africa. The questionnaire was sent in e-mail format using people-surveys software. On completion of the survey, the results were automatically captured by the survey creator ensuring accurate data analysis.

1.8 Summary of chapter one

Chapter one introduced the concept of service quality and highlighted the fact that the task is indeed great for any company wanting to gain full leverage of service quality in order to be competitive. In spite of this, service quality is very important for the South African advertising industry and can result in competitive differentiation, enduring customer relationships and greater productivity. This study aims to assess advertisers' expectations and perceptions of service quality within the advertising industry, ranking the dimensions that are most important to them and making recommendations thereof.

Chapter 2   Literature Review

Chapter two defines the concepts of service and quality as a preamble to establishing what service quality is. Service quality methods of measurement are introduced as the main body of knowledge and the foundation for this research project. Other contexts that are relevant to service quality improvement, for instance, customer satisfaction and service quality gaps are also discussed in this chapter.

2.1 What is service quality?

One of the most significant forces influencing economies worldwide has been the increased rate of spending on services (Lau, Akbar & Fie, 2005). Kandampully (2000) states that services are at the hub of global economic activity and service quality is becoming critical to the success of any service organisation. Despite the increasing importance of the service sector, and the significance of quality as a competitive factor, the service quality concept is not well developed. In this respect, the service sector lags behind the manufacturing sector (Ghobadian, Speller & Jones, 1994).

The concept of service quality has been an intensely debated subject in both academic and business circles for the last four decades. In 1978, Grönroos described service quality as both technical and functional; the first meaning what the customer gets and the latter how the customer receives the service. In 1986, Townsend and Gebhart, as cited in Edvardsson (1998), spoke of 'quality in fact' and 'quality in perception'. 'Quality in fact' refers to meeting established specifications, while 'quality in perception' refers to the provision of the customer's expected quality. Therefore, it is not sufficient for organisations to attain 'quality in fact', if 'quality in perception' is not achieved. Later, Kanter (1991, p8) noted that service quality can "stand or fall on the relationship between providers and recipients, especially when no tangible products are involved." Based on these insights, it can be concluded that service quality is closely linked to activities, interactions and solutions to customer problems. (Edvardsson, 2005)

The topic of service quality can seem fairly straightforward and uncomplicated, but this idea simply ignores the many complexities that lie beyond personal experiences. Although much of the literature on quality has been product oriented, some contributions have focused on quality of service.

According to Zeithaml, Parasuraman and Berry (1990), the following key themes emerged from this research:

- Service quality is difficult for customers to articulate and evaluate. Therefore, the criteria that customers use to evaluate service quality may be difficult for an organisation to grasp;

- Customers do not evaluate service quality solely on the outcome of the service;

- When evaluating service quality, the only criteria that count are those defined by customers.

It is necessary to clearly classify the major differences between services and manufactured products in order to expertly gauge and identify the intricacies of service quality within the South Africa advertising industry.

2.2 Differences between manufacturing and service sectors

The subjective nature of services makes the service concept difficult to define, describe and measure (Parasuraman, Zeithaml and Berry, 1985). Activities, deeds, processes and interactions are most often cited when defining the concept of service. (Lovelock, 2001; Zeithaml and Bitner, 2003). Edvardsson (2005, p2) defines service as a "process or performance, rather than a thing." However, general consensus is that services can be described in terms of four distinctive characteristics namely intangibility, inseparability, heterogeneity and perishability. (Ghobadian et al., 1994; Zeithaml et al., 1990). These characteristics differentiate manufactured products from services and have an impact on the approach and substance of service quality management.

Intangibility of service

Most services are essentially intangible. The lack of tangible attributes makes it difficult for producers to describe the service and for the customer to ascertain its likely virtues (Ghobadian et al, 1994). Essentially, services cannot be touched, seen, tasted, heard, or felt in the same manner in which goods can be sensed (Groth and Dye, 1999). The advertising industry provides creative, media and account management services to their customers. It is this intangibility characteristic that has been identified as the most important differentiator between manufactured products and services, and this is seen as the main reason why organisations find it difficult to understand how customers perceive services (Santos, 2002).

A service is difficult to reproduce consistently and exactly over time. Advertising agencies have on-going relationships with numerous clients requiring differing levels of service which are difficult to replicate. Ghobadian et al., (1994) noted that a number of factors can affect the extent of the heterogeneity of service providers:

- The delivery of service often involves some form of contact between the customer and the service provider. Thus, the behaviour of the service provider influences the customer's perception of quality. In an advertising agency, it is difficult to assure consistency and uniformity of behaviour. Consequently, it is also not easy to standardise or control this facet of service delivery.

- Service operations depend on customers to articulate their needs and provide information. For the advertising industry, the accuracy of this information, and the ability of the agency to interpret the messages correctly, have a significant influence on the customer's perception of service quality.

- Priority and expectations of the customer may vary each time the service is used, and may change during the delivery of the service. The variability of service from one period to another, and from one customer to another, makes quality assurance and control difficult. Advertising agencies must therefore rely on the competence and ability of staff to

understand cu[...]t in the appropriate manner.

Inseparability of production and consumption

In service industries the production of the service usually occurs concurrently with the consumption of the service. This makes it difficult to hide mistakes or quality shortfalls (Ghobadian et al. 1994).

Perishability

Unlike manufactured goods, services cannot be stored, warehoused or inventoried for consumption at a later date (Lamb, Hair and McDaniel, 2000). This makes it impossible to have a final quality check. Therefore, it is important for the advertising agencies to perform the service right first time, every time (Ghobadian et al, 1994).

2.3 Quality defined

Quality is a measure of excellence; however it is "an ambiguous term and formulating a comprehensive and uniform definition is a big, if not insurmountable, problem" (Kasper, van Helsdingen and de Vries, 1999 p 184).

Schneider and White (2004) note that it is possible to classify quality into three broad approaches; the philosophical approach, the technical approach and the user-based approach.

Kasper et al (1999) argues that quality is the attainment of superiority, achieving desirability or becoming useful and cannot be defined or analysed any further. According to the authors, quality is synonymous with innate excellence, where the product or service will have unequalled properties, that is, customers' know quality when they see it, but cannot define it further. Ghobadian et al (1994) contends that this explanation of quality has little practical application from a research or business perspective because prior identification of quality determinants is not possible and quality is considered unknowable and unmeasureable.

The technical (process-led) approach

This approach considers quality from an objective and absolute perspective where quality is defined as conformance to requirements (Crosby, 1980). This approach is concerned with the extent to which a product conforms to technical standards and where the focus is internal, rather than external (Kasper et al, 1999). Therefore, quality is measured in terms of number of deviations from the standard or number of defects. This approach is focused on the objective and the readily measurable and thus is best suited to measuring the quality of standardised products or services where the role of process in determining the quality of outcome is paramount (Ghobadian et al., 1994).

User-based (customer-led) approach

With this approach, quality id defined as external and subjective, hinging on the individual perceptions of customers (Schneider & White, 2004). Quality is therefore satisfying customer's requirements. Ghobadian et al. (1994) notes that the definitions of quality proposed by Deming, Juran, Ishikawa and Feigenbaum fall within this category where quality relies on the ability of the organisation to determine customer's requirements and then meet these requirements. The author goes on to say that this approach is most appropriate for organisations offering high-contact or labour-intensive services.

Most service quality definitions fall within the user-based category and this approach is the most relevant for the advertising industry. Meister (1990) notes that in a service setting, customers judge quality by comparing perceptions of what they receive with their expectations of what they should receive. In addition, Edvardsson (2005) highlights that service quality is perceived and determined by the customer on the basis of co-production, delivery and consumption experiences. Thus measuring the quality of service delivery as perceptions of the user is appropriate for assessing the quality of services. In addition, since a defining characteristic of services is heterogeneity, an approach to quality that reflects the variability in service delivery is essential for defining service quality.

2.4 Obstacles to service quality improvements

In the previous section the differences between manufactured and service goods were reviewed. Ghobadian et al. (1994), argues that there are significant obstacles to service quality improvements including lack of visibility, difficulties in assigning specific responsibility, time required for improved service quality and delivery uncertainties.

Lack of visibility

Service quality problems are not always visible to the provider. Zeithaml et al. (1990) cite research from the United States that, whilst only 4 percent of dissatisfied customers complain, the remaining 96 percent remain discontent, each telling on average another nine or ten people about their discontentment. This places greater responsibility on the service provider to be proactive in the identification of quality problems.

Difficulties in assigning specific responsibility

The customer's overall perception of service quality is influenced by their experience at difference stages of service delivery. However, it is very difficult to attribute quality problems to one particular stage within the service delivery framework.

Time required for improved service quality

Service quality problems often require major effort over a long period of time to resolve. This is because service quality is more dependent on people than systems or procedures, and attitudes or beliefs take longer to change than procedures. It is therefore difficult for managers to keep their attention focused on the problems and remove the root cause of quality shortcomings.

Delivery uncertainties

Control of service quality is complicated by the individual and unpredictable nature of people. This people element encompasses both customers as well as the frontline staff of the service organisations.

To attain service quality, organisations need to focus on the following:

- *A clear service quality vision*: A consequence of the interactive nature of service is the need for a clear vision for quality. In the absence of this vision employees are likely to have individual interpretations of service quality, resulting in service inconsistency and variability of treatment, and consequently poor quality perceptions (Ghobadian, 1994);

- *Dependability* ⟨...⟩ ⟨...⟩ ⟨...⟩ eds to ensure that the service provided is delivered as agreed and conforms to what has been promised, meeting all customer expectations (Edvardsson, 1998);

- *Market and customer focus*: Service quality problems are more likely to arise in organisations that are not focused on identifying and acting on the customer's needs and expectations. A quality organisation should build its service policies from the customer's point of view (Foster and Whittle, 1989);

- *Empowerment of frontline staff*: Service quality can be enhanced by giving frontline staff the latitude to make important decisions regarding customer needs. Allowing frontline staff to make these decisions pays dividends (Uttal, 1987).

2.5 Relationship between service quality and customer satisfaction

Service quality and customer satisfaction have received much attention as they can be used to differentiate companies from their competitors (Brink and Berndt, 2004). However, it is important to note that service quality and customer satisfaction are conceptually distinct but related constructs.

Service quality is a cognitive, objective concept involving the examination of customer expectations whereas customer satisfaction is a shorter term measure focusing on personal and emotional reactions to a particular service (Altman and Hernon, 1998). Thus, customer satisfaction is a combination of affective, feeling-based, and subjective reactions to a particular service (Shemwell, Yavas and Bilgin 1998).

There is little consensus on the relationship between service quality and customer satisfaction. Several researchers including Parasuraman, Zeithaml, Berry and Bitner expound the idea that customer satisfaction leads to service quality (Lee, Lee and Yoo, 2000). For these researchers, service quality is a long-term evaluation whilst customer satisfaction is a transaction-specific evaluation. Other researchers such as Cronin, Taylor and Oliver argue that service quality is the antecedent of customer satisfaction (Lee et al., 2000). Regardless of the debate, what is clear is that maximising customer satisfaction through quality services is essential for service organisations.

Achieving maximum customer satisfaction has been described as the 'ultimate weapon' for service organisations by Davidow and Uttal (1989). According to the authors, when competitors are similarly matched, those that focus on customer service will win.

2.6 Customer expectations

Customer satisfaction occurs when organisations provide services that meets or exceeds customer's expectations. Thus, customer expectations also play an important role in the realisation of customer satisfaction and service quality. Researchers that prescribe to the disconfirmation model are interested in this paradigm as service quality is evaluated by comparing perception of service with expectation (Robledo, 2001).

Zeithaml et al, 1990 states that customer's expectations are influenced by several factors:

- *Informal recommendations, i.e. word-of-mouth communications:* Customers tend to have a higher expectation of services that has been recommended;

- *Personal need:* Every customer has different needs for each service and these needs influence the service judgment;

- *Past experience:* Customers with different past experiences have different expectations of the service;

- *External communication:* External messages play an important role on customer expectations and customers expect the promised service to deliver against the message.

The relationship bet   id service quality is demonstrated in Figure 2.2.

2.7 Service quality gaps

Literature confirms that service quality can be defined as the customers' attitude or judgment about the superiority of a service (Robinson, 1999). However, measurement of the service quality concept is yet to be agreed upon. Currently, there are three main bodies of work that describe the conceptualisation and measurement concept differently.

Zeithaml et al. (1990) suggested that the service quality concept evolved from a comparison of customer expectations with performance perceptions. In their empirical work, Cronin and Taylor (1992) controverted the framework of Zeithaml et al and developed a performance-based measure that illustrated service quality as a form of customer attitude. Finally, in 1993, Teas argued that service quality is derived from a comparison of performance with ideal standards (Robinson, 1999).

The reason that service quality is subjective and difficult to conceptualise or measure is because of the subjective nature of services (Brown, Gummesson, Edvardsson and Gustavsson, 1991). Most services are such that the customer is present in the delivery process and therefore the perception of quality is influenced not only by the service outcome but also by the service process. Both Parasuraman et al., (1985) and Lewis (1987) suggested that

what can be measure   abstractions, that is, the difference between expectations and perceptions determine the level of service quality. Perceived quality falls in a range with unacceptable quality at one end of the range and ideal quality at the other end. Parasuraman et al., (1988, p16) defined perceived service quality as "global judgment or attitude, relating to the superiority of the service" and stated that service quality is the gap between customer expectations (E) and their perception of the service provider's performance (P) Therefore, the service quality score (Q) can be measured by subtracting the customer's perception score from customer expectation score:

Q = P - E

Furthermore, Lamb, Hair and McDaniel (2000) and Zeithaml and Bitner (2003) argued that there are five key discrepancies that can influence customer evaluations of service quality:

Gap 1 is the gap between customer expectations and management perceptions of those expectations. The reason for this gap is the lack of proper market / customer focus;

Gap 2 is the gap between management's perception of what the customer wants and specifications of service quality. This gap is caused by service design flaws;

Gap 3 is the gap betw[...] and the delivery of the service. There are many reasons for this gap including process problems and frontline staff performance variability;

Gap 4 is the gap between service delivery and what the organisation promises to the customer through external communication. A realistic expectation will normally promote a more positive perception of service quality;

Gap 5 is the gap between customers' service expectations and their perceptions of service performance.

Figure 2-1: Quality gap analysis model
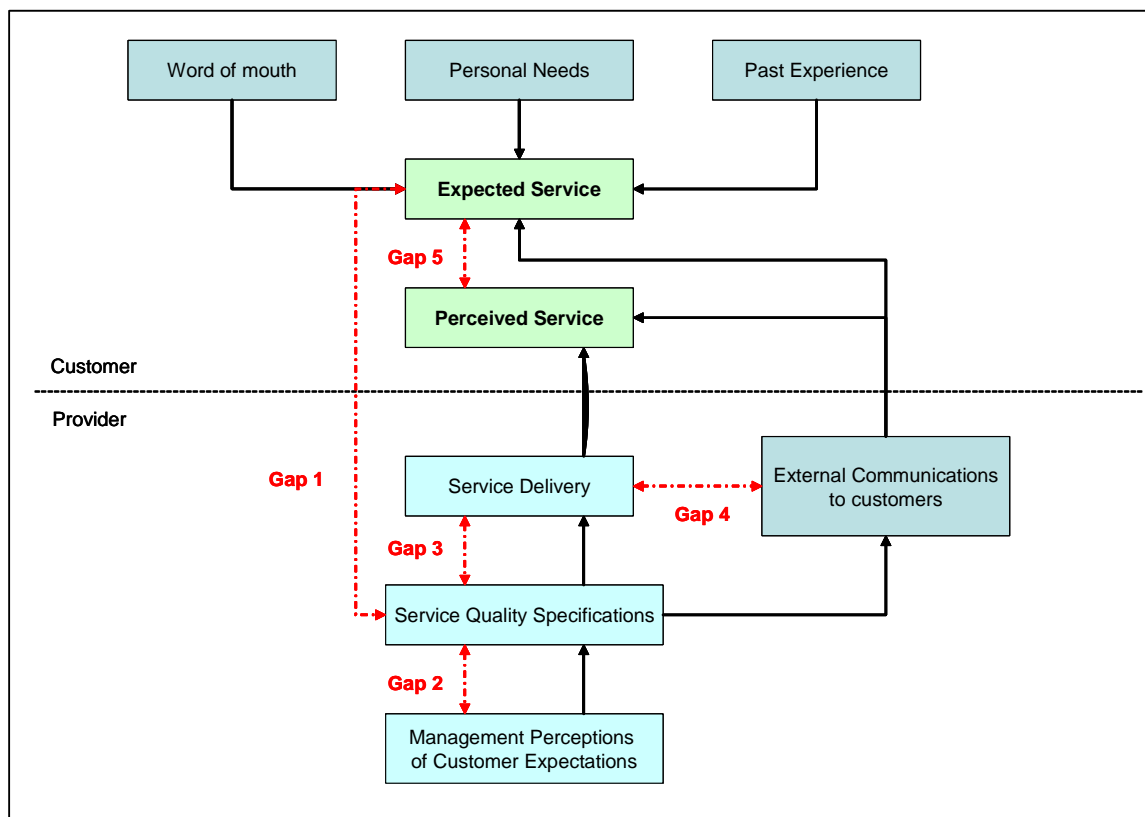
Source: Zeithaml et al., 1990

Zeithaml and Bitner (2... e service quality, it is important to manage the gaps that exist between expectations and perceptions on the part of management, employees and customers. As indicated in Figure 2.1, the most important gap (Gap 5) is that between customer's expectation of service and their perception of the service actually delivered (Lau et al, 2005). To manage this gap, the service provider must close the four other gaps (Gap 1, 2, 3 and 4) within the organisation that inhibit delivery of quality service. Thus, the customer's perceptions of the level of service performance that meets their expectations will reflect on the quality of service provided by the organisation.

According to Lewis (1987), gap measurement is a significant marketing tool, as it has the advantage of being less abstract than other measures, and it also considerably eases the task of measuring service quality.

2.8 Service quality tools

During the past decade various tools have been developed to measure service quality, with researches not being able to agree which is superior. The credit for pioneering service quality research goes to Parasuraman, Zeithaml and Berry (1985, 1988, and 1990). The authors, based on qualitative research, formulated a measure of service quality derived from data on a number of services. The initial exploratory research revealed ten dimensions used by customers in assessing service quality.

A listing of the dimensions, along with examples of the types of evaluating criteria is highlighted Table 1.

Table 1: Service quality determinants

Dimension	Example of Evaluating Criteria
1. Tangibles	Appearance of physical facilities and personnel: - *Facilities, appearance, equipment*
2. Reliability	Performing services right the first time: - *Consistency, dependability, accuracy, correctness*
3. Responsiveness	Willingness and ability to provide prompt service: - *Willingness, timeliness, promptness*
4. Communication	Customer informed in understandable language: - *Informed, understanding, attentiveness*
5. Courtesy	Friendliness of customer-contact personnel: - *Politeness, respect, consideration*
6. Understanding Requirements	Effort to ascertain customer's needs and requirements: - *Individualised attention, recognition*

Dimension	Example of Evaluating Criteria
7. Access	Ease of contacting the service firm: - *Approachable, ease of contact, convenience*
8. Competence	Possession of skill to perform service effectively: - *Knowledge, skill*
9. Credibility	Service is believed and trusted: - *Trustworthiness, believability, honesty, reputation*
10. Security	Freedom from danger, risk or doubt: - *Confidentiality, safety*

Source: Adapted from Ghobadian et al.,1994

With further empirical scrutiny, Parasuraman et al. (1988) developed a 22-item scale, called SERVQUAL, which measures service quality based on five dimensions, as detailed in Table 2.

Table 2 : SERVQUAL dimensions

Dimension	Example of Evaluating Criteria
1. Tangibles	Physical facilities, equipment and appearance of personnel.
2. Reliability	Ability to perform promised service dependably and accurately.
3. Responsiveness	Willingness to help customers and provide prompt service.
4. Assurance	Knowledge and courtesy of employees and their ability to convey trust and confidence.
5. Empathy	Caring, individualised attention the firm provides its customers.

Source: Parasuraman et al., 1988

The entire approach that customers have expectations of service performance; they observe the performance and later form performance perceptions (Sureshchandar & Rajendran, 2001). Figure 2.2 underscores the link between service quality dimensions and the factors that influence customer expectations. Rust and Oliver (1994) note that the SERVQUAL instrument captured the crux of what service quality might mean, i.e. a comparison to excellence in service by the customer.

Figure 2-2: Customer assessment of service quality
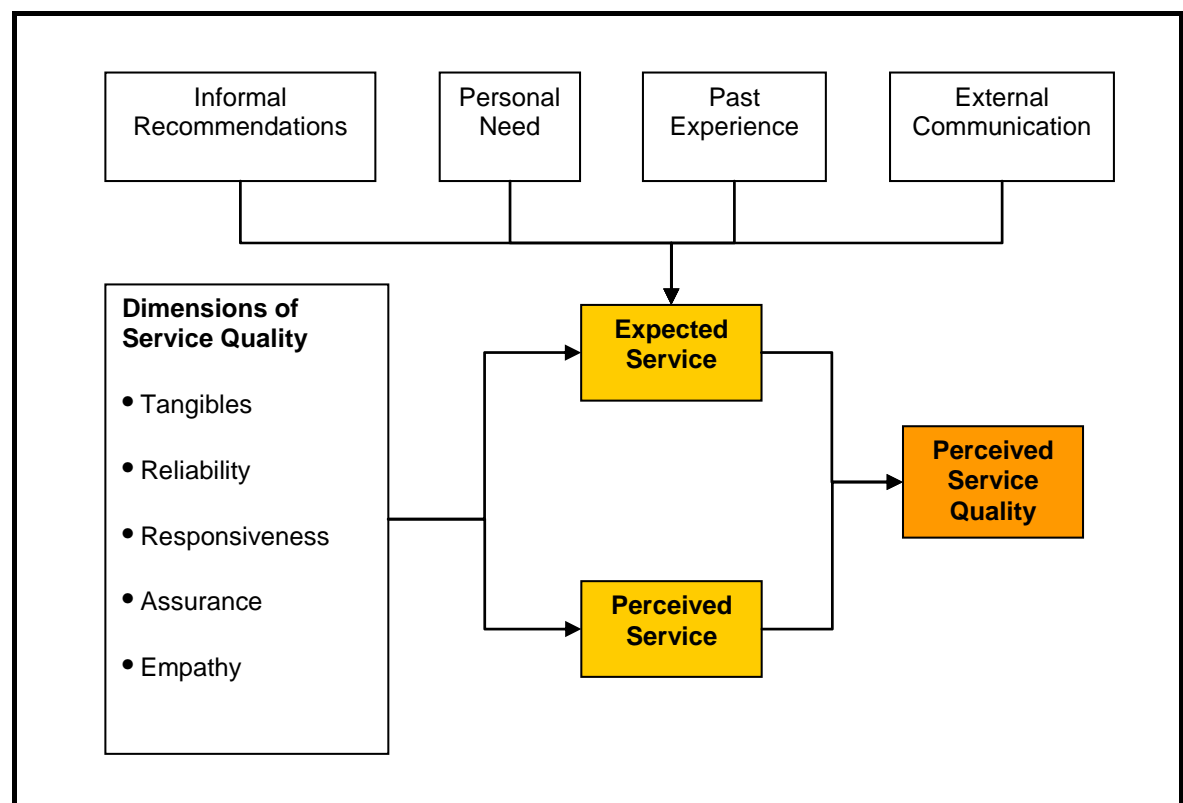
 Source: Zeithaml et al., 1990 p.23

The impact of SERV
ality measurement is widely accepted, however, the confident claims of Parasuraman et al. (1988) in relation to SERVQUAL provoked a great deal of evaluation and criticism from both researches and practitioners.

According to Morrison Coulthard (2004), one of the major criticisms of SERVQUAL concerns its dimensionality. Numerous studies failed to identify the underlying dimensions originally reported by Parasuraman et al. (1988). In particular, Carmen (1990) found that there were a larger number of dimensions and, in addition, highlighted the multifaceted nature of services, where the number of dimensions is influenced by the context under evaluation.

Cronin and Taylor (1992) questioned the relevance of the expectations-perceptions gap as a basis for measuring service quality and proposed an alternative, exclusively performance based measure, of service quality called SERVPERF. Cronin and Taylor claimed this would best reflect customers' perceptions of service quality and that expectations are not part of the equation. (Franceschini, Cignetti and Caldara, 1998; Robinson, 1999; Lee et al., 2000)

To further complicate the issue, some researchers have argued for more than five factors. For example, Carmen (1990) proposed that the original ten dimensions might have been better reduced to seven or eight, rather than five, and Gummerson (1991) makes the point that he finds Parasuraman et al.'s original ten dimensions easier to discuss with managers than their five dimensions. In addition, Parasuraman himself conceded in 1991 that interrelationships existed between the five dimensions. (Morrison Coulthard, 2004).

In another empirical work, Teas (1993) investigated conceptual and operational issues associated with a perceptions-minus-expectations (P-E) service quality model. The author developed alternative models of perceived service quality based on evaluated performance and concluded that the model could overcome some of the problems associated with the P-E gap conceptualisation of service quality (Sureshchandar & Rajendran, 2001). A comparison of the three most popular methods is presented in Appendix 1: SERVQUAL, SERVPERF and Normed Quality.

2.9 SERVQUAL for service quality measurement

Although several research works have criticised the operationalisation, conceptualisation and application of SERVQUAL across different services, Schneider and White (2004) argue that the dimensions presented were only intended to serve as frameworks for measuring service quality and were designed to be modified or changed to fit specific service contexts. They go on to say that these changes might entail including new dimensions to cover aspects of service unique to a particular firm or industry, or in the case of SERVQUAL, it could mean editing the wordings of the items.

Importantly, Parasuraman et al. (1988) recognised that the SERVQUAL instrument would not be suitable to measure services across all organisations and all industries without some form of modification. They made the point that "it provides a basic skeleton…encompassing statements for each of the five service-quality dimensions. The skeleton, when necessary, can be adapted or supplemented to fit the characteristics or specific research needs of a particular organisation." (Parasuraman et al., 1988, p 30-31)

There is a need for valid and reliable measures of service quality in the advertising industry. Despite criticisms, research conducted in the Australian advertising industry has shown that the SERVQUAL instrument performs almost identically to its alternative, SERVPERF. However, SERVQUAL follows a more scientific approach and is potentially a superior measure of

perceived service q̲ point. (Quester and Romaniuk, 1997). In addition, Schneider and White (2004) note that the SERVQUAL measure and its underlying dimensions can usefully serve as a base for the development of service quality surveys in many companies and industries.

2.10 Summary of chapter two

Chapter two provided an analysis of service quality and the various models developed to measure quality of service. It is clear that service quality is a dynamic and growing topic that continues to be intensely debated with many alternative views. However, the South African advertising industry would do well to take note of the benefits of service quality to its business model. What is evident from the literature is that the number of dimensions of service quality is highly influenced by the context under evaluation as well as the methods of evaluation. It is further observed that service quality outcomes and measures are dependent on, amongst others, the type of service setting, situation, time and need factors. The modified SERVQUAL instrument emerges as the most appropriate tool for the assessment of advertisers' expectations and perceptions of service quality in the South African advertising industry.

Chapter 3   The Advertising Industry

Chapter three defines what advertising is as a construct and establishes the importance of the industry in South Africa. The chapter highlights the size and scope of advertising services, and concludes with a commentary on the current service malaise within the South African industry.

3.1 The importance of advertising

Advertising in one form or another is used by virtually all marketers with the ultimate objective of selling something – a product, service or idea. The significance of advertising is indicated by the amount of money that is spent on it. In 2005, Adex Nielsen Media Research indicated that advertising expenditure exceeded R17 billion per annum (Financial Mail, 2006). Much of the increase in expenditure was driven by pent-up demand for goods and services from the burgeoning black middle class, homeowners cashing in on rising property prices and a general consumer spending boom (Table 3). Thus, the dynamic growth experienced by retailers, manufacturers and service providers fueled increases in advertising expenditure in line with increasing sales.

Table 3 : Advertising S [UNIVERSITEIT VAN PRETORIA / UNIVERSITY OF PRETORIA / YUNIBESITHI YA PRETORIA]

Ad-spend (Financial Mail, 2006)			
Medium	**2004 (Rm)**	**2005 (Rm)**	**Rate Inflation (%)**
Print	5 741,5	6 804,1	7,2
Television	5 555,2	6 331,1	9,7
Radio	1 930,5	2 362,2	9,7
Outdoor	623,6	788,2	2,7
Cinema	253,7	591,2	8,6
Internet	116,0	140,7	n/a
Direct Mail	122,5	121,5	n/a
Total	**14 343,0**	**17 139,0**	**8,6**

Source: Financial Mail, 2006 p.110

During 2005, the demand for media outstripped the supply. Consequently, the unit cost of media rose in excess of the consumer price index driven off the ever increasing demand from advertisers to market their products in the consumer spending boom.

3.2 The adverting agency

Numerous companies in South Africa make use of advertising agencies to carry out some or all of their advertising functions. An advertising agency is an independent company set up to provide specialised services in advertising in particular, and marketing in general (Standton, Etzel, Walker, Abratt, Pitt, and Staude, 1992). Most agencies are focused on providing above-the-line services i.e. television, radio, print and outdoor advertising. However, there is a move to offer a broader range of services to clients, apart from advertising, including market research, strategic planning and implementation, media services, public relations, new product development and promotions.

The size of the South African advertising industry is difficult to determine due to the vast scope of advertising services and the significant number of small players in the market. The ACA represents 93 accredited advertising and communications companies employing in excess of 3,000 people (ACA, 2006). The advertising industry is dominated by the top 10 agencies, mostly based in Johannesburg, which have revenues in excess of R1,2 billion per annum (Financial Mail, 2006).

Table 4 : Agency Ranking by Income and Growth

Rank	Agency	Income Rm	Annual Growth %
1	FCB SA (Johannesburg)	101.0	48.8
2	Ogilvy Joahnnesburg	100.0	10.5
3	TBWA/Hunt/Lascaris Joahnnesburg	98.0	27.5
4	Ogilvy Cape	93.0	37.0
5	Net#work BBDO	89.0	35.0
6	JWT Group JHB	88.0	22.0
7	Admakers	75.4	15.3
8	Y&R JHB	65.0	9.0
9	Y&R Headlet Byrne	64.0	20.0
10	Saatchi & Saatchi SA	65.0	3.1
11	The Jupiter Drawing Room	53.1	17.7
12	HerdBuouys McCann-Erickson	51.0	1.8
13	TBWA Durban	50.0	11.0
14	BBDO Cape Town	45.0	16.0
15	Grey Worldwide SA	44.0	18.0
16	The Hardy Boys	39.2	13.6
17	FCB Cape Town	39.0	19.8
18	Lowe Bull (Gauteng)	35.0	17.0
19	Lobedu Leo Burnett	32.0	23.0
20	DDB SA	30.0	87.0

Source: Financial Mail, 2006 p.102-103

Importantly, the South African advertising industry is recognised as a leader in the conceptualisation and production of internationally acclaimed and award-winning advertising. Many agencies are experiencing a renewed energy, sense of purpose and focus as the boom in advertising expenditure continues. However, the industry is nothing if not extremely competitive; driven by the

need to deliver outsta ... brands. South African agencies are continuously striving to stay ahead of competition through innovation, inventiveness, creativity and service excellence.

According to Matthew Bull, CEO of advertising agency Lowe Bull, "Advertising makes the world a better place" (Maggs, 2006b p. 63). Interestingly, the advertising industry reflects the perceptions, sensitivities and associations of the various environments it portrays. It is very much a peoples' industry, reliant on human connections and relationships. For this reason, quality of service cannot be underestimated.

3.3 The advertising industry's dilemma

Table 4 highlights that advertising agencies in South Africa spend vast amounts of money to build their customers' brands. However, a significant number of advertising practitioners are concerned that there is very little understanding of the relationship issues that exist between agencies and their customers. Mike Bosman, ex-CEO of TBWA argues that "the advertising industry is out of alignment…the model the ad industry is working on is stale and outdated" (Dicey, 2006 p.148). In her article, "Agencies: act your age", Val Bourdos asks if advertising agencies know how to behave (Bourdos, 2005). The termination of relationships between advertising agencies and their clients following the initial honeymoon period, despite good work and sometimes brilliant results, is becoming fairly common. Bourdos also notes

that the industry has elationships suddenly becoming dysfunctional after years of success.

Unfortunately, the South African advertising industry is notoriously associated with young people, crazy ideas and general excessiveness (Sartini, 2006). However barring this reputation, the business is very much driven by both creativity and creating human connections. It is therefore remarkable that although many tactics have been employed to ensure creativity, agencies have traditionally not capitalised on the fact that service quality poses the potential for greater competitive advantage.

The industry is in the middle of a paradigm shift and the advertising landscape is changing. Analysts have proclaimed that "advertising is dead" (Plummer, 2006, p.1) but the malaise is driven by underperforming agencies that are not able to provide services to the advertiser's satisfaction (Moerdyk, 2004).

3.4 Summary of chapter three

Chapter three explained that the South African advertising industry has experienced significant growth during the past year, driven off the country's economic performance and the consumer spending boom. However, the industry traditional business model is changing and the need to be more focused on delivering service quality is evident.

Chapter 4   Research Questions

Chapter four details the research questions that emanate from the objectives of this study. These questions are based on findings and conclusions from the literature review.

The South African advertising industry is under pressure to become more customer focused and the need to meet advertisers' expectations and retain their loyalty has become critical (Financial Mail, 2006). Consequently, the most successful advertising agencies aim to differentiate themselves on the basis of high service quality

4.1 Research questions

Research question 1:

- What are advertisers' expectations regarding service quality in the advertising industry in terms of the five service quality dimensions?

Research question 2:

- What are advertisers' perceptions of the service quality they actually receive in terms of the five service quality dimensions?

Research question 3:

- Are the five service quality dimensions inter-related?

Research question 4:

- Is the advertising industry's perceived service quality at, above or below the expectations of clients?

4.2 Summary of chapter four

Chapter four highlighted that the four research questions that will be answered by utilising methodologies discussed in chapter five.

Chapter 5   Methodology

Chapter five reviews the research methodology used in this study, describes how the questionnaire was designed, discusses its limitations and concludes with how the data was collected and analysed.

5.1 Methodology overview

The purpose of the research was to identify and understand advertisers' expectations and their perceptions or experiences with advertising agencies' services in South Africa. A quantitative research methodology was favoured as large amounts of data could be collected economically, the data could be standardised allowing for comparison, and results could be quantified and summarised timeously (Welman and Kruger, 2003). Quantitative research involves the use of structured questions where the response options have been predetermined and a large number of respondents are involved. By definition, the measurement must be objective, quantitative and statistically valid. (Welman and Kruger, 2003)

5.2 The instrument

The aim of the survey was to obtain information from a defined set of people. According to Standton et al., (1992), a survey enables a researcher to understand the population sample and infer characteristics of a population (generalise findings). An advantage of using surveys to measure service quality is the ability to arrive at a score that can serve as an indicator of service quality (Wiley, 2006).

The SERVQUAL measuring instrument developed by Parasuraman et al. (1988) was adapted and used for the study. A number of other industry specific empirical studies have been conducted using the SERVQUAL model, including some cited research carried out in banks (Bhat, 2004), tourism and hospitality (Juwaheer, 2004; Lau, Akbar and Fie, 2005), and advertising (Quester and Romaniuk, 1997; Venetis and Ghauri, 2004).

Importantly, Quester and Romaniuk noted that the SERVQUAL measuring instrument was potentially a superior measure of perceived service quality from an empirical standpoint and was a more suitable tool for the purpose of performance evaluation and monitoring. Based on the literature review and past studies, it was determined that SERVQUAL was the best instrument for studying service quality perceptions in the South African advertising industry.

The data collection [UNIVERSITEIT VAN PRETORIA / UNIVERSITY OF PRETORIA / YUNIBESITHI YA PRETORIA] art, self-administered questionnaire as detailed in Appendix 4:

- The first section of the questionnaire was structured to measure the advertiser's expectations of ideal service quality in an advertising agency. Respondents were asked to indicate their level of expectations based on a Likert scale from one (very low expectation) to seven (very high expectation);

- The second section determined the advertiser's most important service quality dimension and their least important dimension. Respondents were asked to allocate 100 points amongst the five dimensions;

- The third section comprised questions relating to the perceptions of service quality provided by the agency used by the advertisers. Again, respondents were asked to indicate their level of perceptions based on a Likert scale from one (very low perception) to seven (very high perception);

- The final section was designed to capture the demographic characteristics of the respondents.

5.3 Validity and reliability

To ensure validity, this research instrument was pre-tested among eight advertisers to ensure that all five dimensions were relevant and important for the advertising industry. The results of the pre-test provided valuable information on the design and wording of the questionnaire. Minor grammatical alterations to certain questions were made following the pre-test. These changes made the instrument more understandable and appropriate for the intended respondents.

The reliability of the questionnaire is concerned with the "consistency of responses to the questions" (Saunders et al., 2003 p.309). Breakwell, Hammon and Fife-Schaw (2000) claimed that one of the most practical methods of establishing reliability when testing dimensions is through internal consistency. The authors explained that internal consistency reliability is based on the principle that each part of the test should be consistent with all other parts.

Gliner and Morgan (2003) noted that if each item on the survey is multiple choice, such as a Likert scale, then the Cronbach's Alpha test is the method of choice to determine internal reliability. In addition, the Cronbach Alpha is the most commonly used index of reliability in many fields such as education research and psychology (Gilner and Morgan, 2003). The Cronbach Alpha has a range of 0-1, where 0 is no internal consistency and 1 is the maximum

internal consistency)9). According to the authors a rule of thumb of 0.75 is set as an acceptable level for the Cronbach Alpha, depending on what is being measured. However, Nunnally (1978) set a level of 0.7 as acceptable. In addition, Breakwell et al., (2000) point out that the estimates of reliability provided by the Cronbach Alpha coefficient are lower bound estimates, implying that the actual reliability may be slightly higher. Therefore, the acceptability values can be considered as guidelines when determining the degree of reliability.

5.4 The sample population

The population is defined as a collection of all the observations of a random variable under study and about which the researcher is trying to draw conclusions in practice (Welman and Kruger, 2003). The large population of South African advertisers made it impractical and uneconomical to include all members of the population in the research. Thus, the most feasible way of selecting a sample was to use accidental (incidental) sampling; "an accidental sample is the most convenient collection of members of a population (units of analysis) that are near and readily available for research purposes" (Welman and Kruger, 2003, p 62).

The targeted population for this study consisted of advertisers ($n = 100$) from the top 100 companies in terms of advertising expenditure, as identified in the Financial Mail 2006 Adfocus survey (Appendix 2). For the study, an advertiser was any individual who worked in the marketing department of one of the above mentioned companies (Brand Manager; Marketing Manager or Marketing Director) and employed the services of an advertising agency.

5.5 Data collection

Data was collected over a five-week period. The questionnaire was distributed via e-mail contained a covering letter and link to a web page from which the questionnaire could be completed. On submission, a page appeared thanking the respondent and giving them the option for feedback. This method of data collection was chosen as it could be administered in a time efficient manner, minimising the period to get the survey into the field (Evans and Mathur, 2005).

On completion of the survey, the results were automatically captured and collated by the survey creator. This minimised data contamination as well as inaccuracies from manual data capturing. The author exported the responses from the survey tool to an excel spreadsheet for analysis.

5.6 Data analysis

In line with the objective of the research, the main area of analysis concerned expectations and perceptions of service quality and its dimensions: tangibility, reliability, responsiveness, assurance and empathy (Appendix 3). Expectations and perceptions were measured on a seven-point strongly agree to strongly disagree Likert scale, allowing the data to be analysed using a frequencies and mean calculations.

- *Frequencies and means* are examples of descriptive data. Clark and Moore (2001, p.1) describe descriptive statistics as a "body of techniques" that explain a set of data in an effort to condense or better understand what is there.

Besides descriptive statistics, inferential statistics were computed. The t-test for independent means and the ANOVA test was used to compare the mean scores of certain demographic groups.

- *Inferential statistics* is a body of techniques which allows us to draw conclusions about a larger group of objects by examining only a proportion of the group (Clark and Moore, 2001);

- *T-test for independent means* tests differences in means of two groups that are unrelated to one another, such as males and females;

- *Analysis o* ⬤⬤⬤⬤⬤⬤⬤⬤ rned with testing the difference among K sample means, i.e. similar to the t-test, but between more than two groups (Kazmier, 2003);

- *Correlation analysis* test for linear relationships between variables. The correlation coefficient can range from -1.00 to +1.00 (Kazmier, 2003).

5.7 Limitations of the research

Although the study was valid and a foundation for future research, it did have a number of constraints. The major limitation was the number of advertisers selected for the survey. Due to time and resource constraints, only 100 advertisers were included in the study. Thus, generalisations to all advertisers may be limited. The respondents were from different cultures, different job environments, with difference levels of experience. These factors may have contributed towards different perceptions of service quality.

In terms of the questionnaire, the use of this survey method was impersonal and allowed no opportunity for clarification of answers. Questionnaires also elicit biases e.g. respondents may tend to answer questions in an acceptable manner. Ultimately, this may "put the validity of the conclusions into question" (Cummings and Worley, 2001 p.116). In addition, the data collected was not as wide-ranging as that obtained from focus groups or interviews (Saunders, Lewis and Thornhill, 2003).

5.8 Summary of

Chapter Five demonstrated that a qualitative research methodology, utilising a modified SERVQUAL questionnaire, was appropriate to measure advertisers' expectations and perceptions of service quality in the advertising industry. The reliability and validity of the instrument was tested and data was analysed using frequencies and means, inferential statistics, T-tests as well as analysis of variance and correlation analysis. Despite the limitations detailed in the chapter, the study has potential to provide a valid foundation for future research.

Chapter 6   Research Results

The objective of Chapter six is to present the results from the empirical section of the research. The results of the survey are laid out using both data table and graph format to facilitate ease of reference.

- The first section of the research results presents the demographic data, summarised in graphs and tables, with the view of sketching the background against which the results are to be interpreted;

- The second section of the research results establishes the reliability of the five SERVQUAL dimensions before the research questions (all pertaining to these dimensions) are examined;

- Once reliability has been established, the research questions around the expectations, perceptions and gaps in service quality are examined.

The results are reported as they appeared after the collation of all returned questionnaires and the initial analysis.

6.1 Responses from the survey

The survey creator automatically collated and recorded responses from the survey. Responses were monitored on a daily basis and two reminder e-mail notifications were sent to non-respondents requesting completion of the questionnaire (Appendix 5). In total 68 responses were received in the 5 week period, however, 27 of these were not sufficiently completed. Thus a response rate of 41% was achieved.

6.2 Demographic profile of the sample

Respondents were asked to indicate their age, gender, job descriptions, industry classification and number of years marketing experience. All variables were measured through categorical variables and the results appear in tables 5 and 6, and figures 6.1 to 6.3.

6.2.1 Age distribution

Figure 6-1: Age

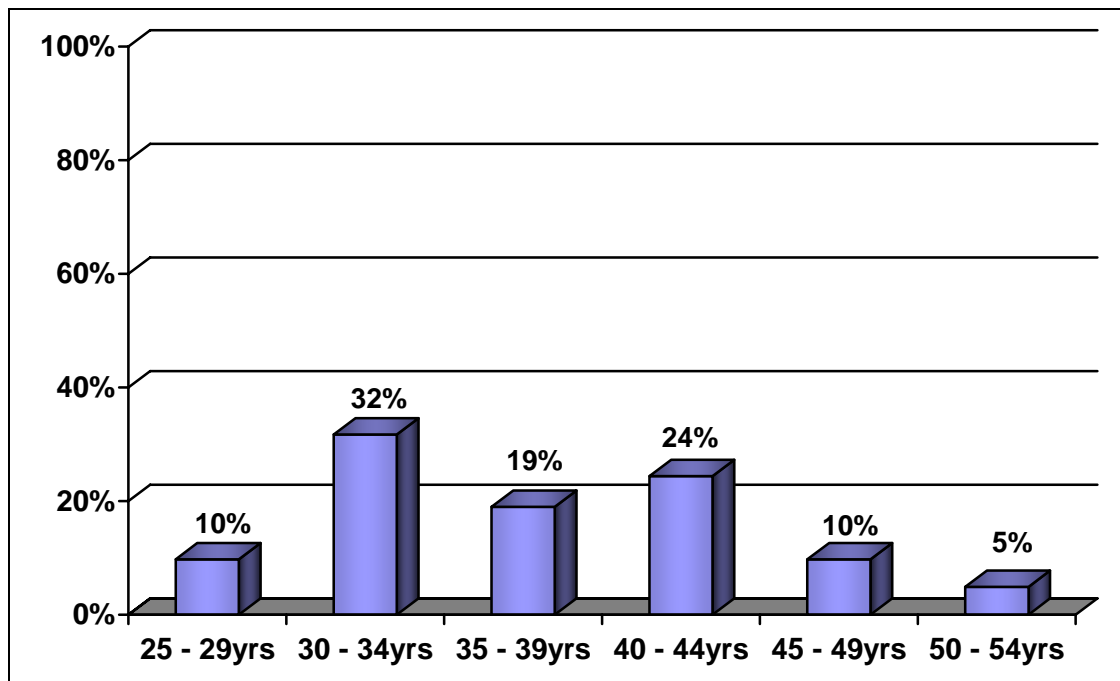With reference to figure 6.1, two-thirds of the respondents were aged between 30 and 44 years (75%). Only 5% of the respondents were above 50 years of age and 10% below 29 years of age.

6.2.2 Gender distribution
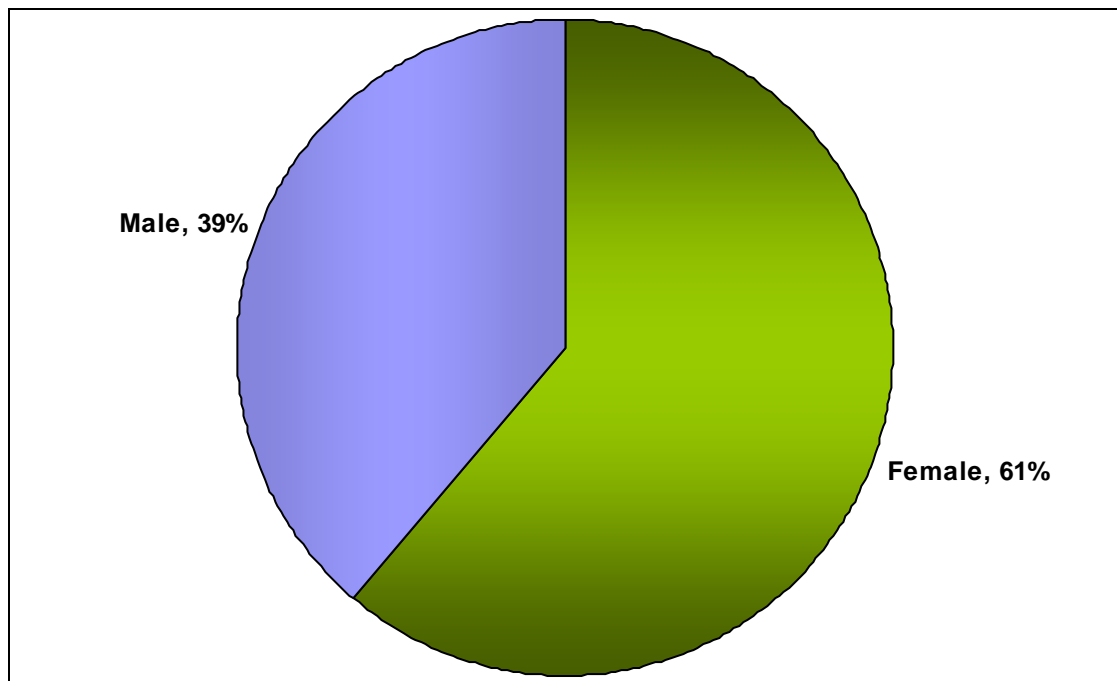
Figure 6-2: Gender

Figure 6.2 shows that the sample was skewed slightly towards females; with males representing 39% of the respondents and females representing 61% of the respondents.

6.2.3 Job designations

Table 5: Job designations

Job Description	Frequency	Percentage
Marketing Manager	15	37%
Marketing Director	9	22%
Brand Manager	6	15%
Senior Marketing Manager	5	12%
Senior Brand Manager	2	5%
Other		
Category Director / GM	1	2%
Global Innovations Director	1	2%
Head of Corporate Relations	1	2%
Managing Director	1	2%

With reference to table 5, the highest response rate (number of respondents per job position) came from marketing managers (37%) and marketing directors (22%). This was followed by brand managers (15%) and senior marketing managers (12%).

6.2.4 Industry clas

Table 6: Industry classification

Classification	Frequency	Percentage
Consumer Goods	9	22%
Financial Services	9	22%
Food and Beverages	9	22%
Retail	4	10%
Entertainment	3	7%
Telecommunications	3	7%
Automotive	2	5%
Industrial	1	2%
Transportation	1	2%

Table 6 indicates that respondents represented a variety of industries. The majority of the responses came from the consumer goods, financial services, and food and beverages sectors at 22% each. Appendix 2 details the industry breakdown and identifies the companies that were surveyed in this study.

6.2.5 Work experience

The final demographic question related to the number of years working in the marketing field of business.
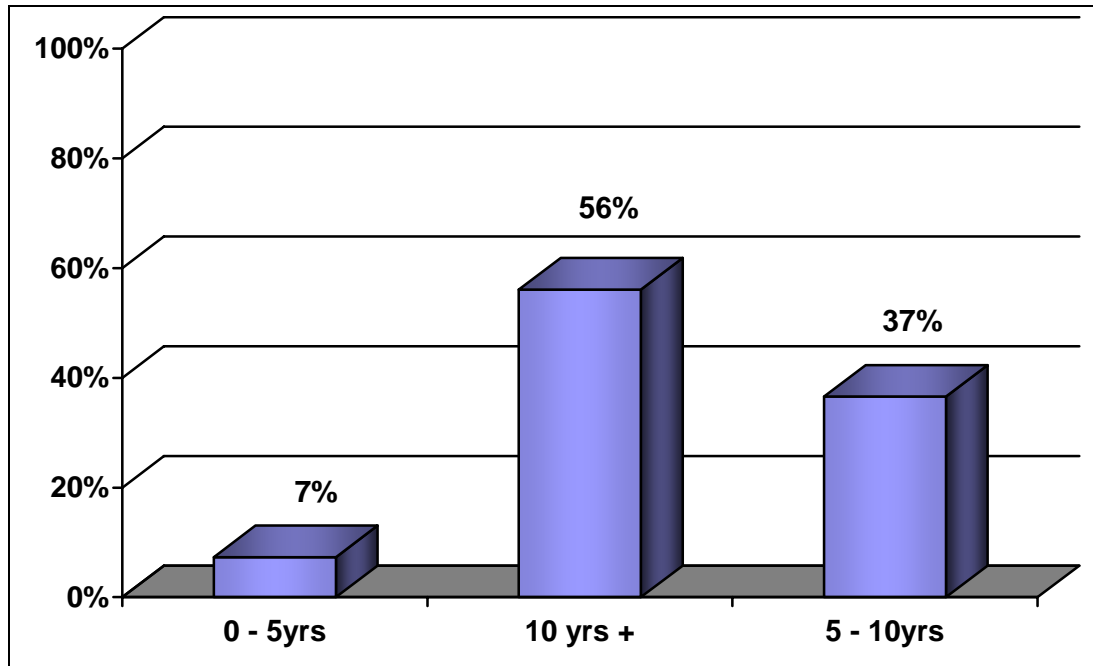
Figure 6-3: Number of years experience

The majority of the respondents (93%) came from individuals that had in excess of 5 years marketing experience, as detailed in figure 6.3. Only 7% of respondents had experience levels below 5 years.

6.3 Reliability an ~~...~~ mensions

The Cronbach Alpha was calculated as a measure of internal reliability consistency. Section 5.3 discusses the benefits of this calculation in detail.

Table 7: Cronbach alpha of SERVQUAL dimensions

Dimensions	Cronbach Alpha
Tangibles	0.716
Reliability	0.680
Responsiveness	0.713
Assurance	0.731
Empathy	0.731

Table 7 indicates that, with the exception of the "reliability" factor, all other dimensions had reliability values above 0.7. The "reliability" factor of the study had a Cronbach Alpha score of 0.680. This is acceptably high; just below the suggested value of 0.7.

6.4 Advertisers' service quality expectations

Research Question 1:

What are advertisers' expectations regarding service quality in the advertising industry in terms of the five service quality dimensions?

6.4.1 Mean ratings on SERVQUAL dimensions
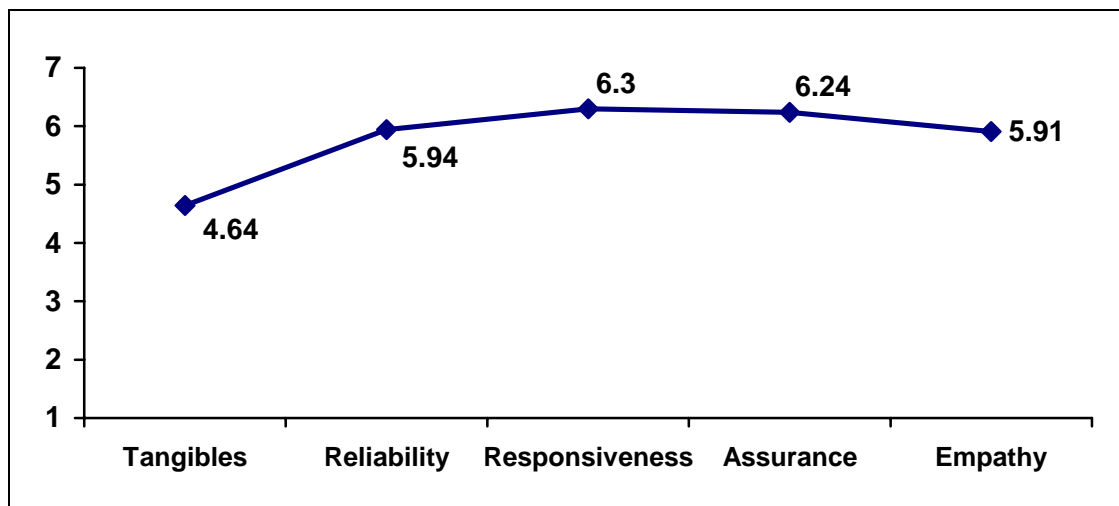
Figure 6-4: Mean score on SERVQUAL dimensions: expectations

The service quality dimensions of responsiveness and assurance have the highest mean scores, 6.3 and 6.24 respectively. The tangibles dimension is the least important factor for an advertising agency to be classified as "excellent", with a mean score of 4.6.

6.4.2 Analysing ma~~ ~~ :tations

Table 8: T-test for differences in mean expectations: males and females

Dimensions	t-value	p-value
Tangibles	0.60	0.55
Reliability	1.47	0.15
Responsiveness	(0.53)	0.60
Assurance	(0.72)	0.47
Empathy	(1.80)	0.08

Males and females display similar scores on all the dimensions and do not differ significantly in terms of mean ratings. A t-test for independent means was performed on the mean scores of males and females and none of the dimensions showed significant difference.

6.4.3 Relationship between industry experience and expectations

Responses from respondents with different industry experience were compared by means of an analysis of variance test (ANOVA test).

Table 9: ANOVA test for differences in mean expectations: industry experience

Dimensions	F-value	p-value
Tangibles	3.76	0.032
Reliability	2.05	0.142
Responsiveness	0.87	0.429
Assurance	6.02	0.005
Empathy	0.51	0.603

In terms of the tangibles and assurance factors, there is a significant difference between respondent's scores with different number of years experience in the marketing sector. The mean scores for each age group are plotted below for these two factors.
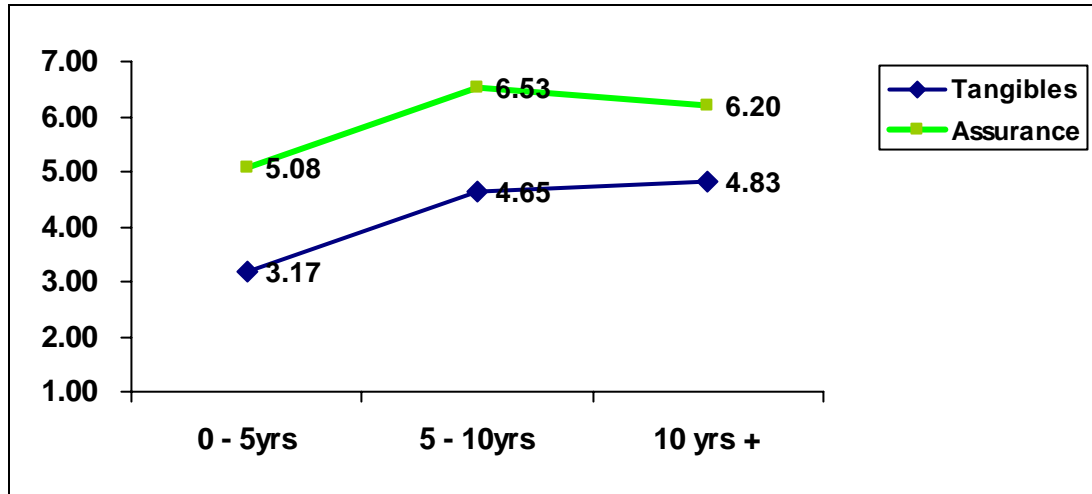
Figure 6-5: Mean score on tangibility and assurance expectation dimensions

for industry experience groups

Respondents with between 0 and 5 years marketing experience were more likely to rate the tangibles and assurance factors significantly lower than respondents with more years experience.

6.4.4 Weighting the five service dimensions

Section Two of the questionnaire asked respondents to weight the 5 SERVQUAL dimensions, with the more important dimensions receiving higher scores from a total of 100. The descriptive information in Table 10 indicates the smallest and largest percentages assigned by any one respondent as well as the mean percentage per attribute.

Table 10: Descriptive information for weighting of dimensions

	N	Minimum	Maximum	Mean	Std. Deviation
Reliability	41	15	85	32.4	13.35
Responsiveness	41	5	40	23.6	8.55
Assurance	41	5	40	21.2	7.06
Empathy	41	2	30	13.4	5.45
Tangibles	41	2	20	9.4	4.25

The reliability factor is rated highest with an average mean of 32.4%, followed by responsiveness and assurance with mean scores of 23.6% and 21,2% respectively. One respondent awarded the reliability factor a value of 85% and thus this value is an outlier. The 5% trim mean - trimming the top and bottom 5% from the results - is still high at 30%, and it is therefore concluded that this dimension is statistically the most important as rated in this section.

6.4.5 Dimension rankings

In addition to the distribution of weights across the dimensions, respondents were asked to indicate the *most, second* most and *least* important dimensions.
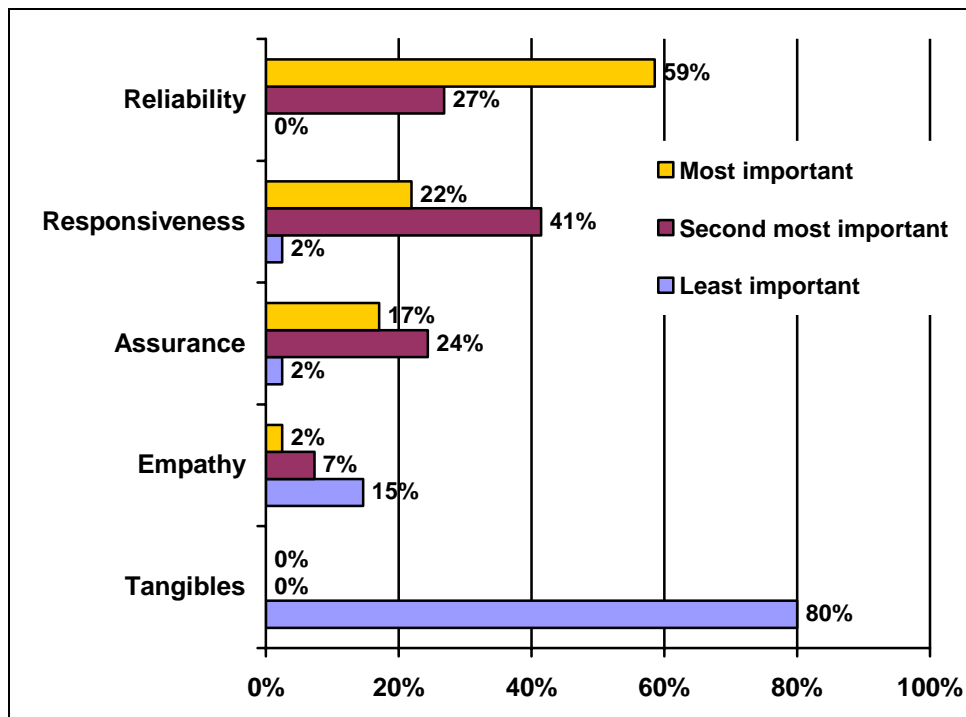
Figure 6-6: Dimension rankings

As indicated in figure 6.6, reliability is the most important factor from this analysis and is rated as such by 59% of respondents. The tangibles factor was ranked the least important dimension, with 80% indicating as such.

6.5 Advertisers service quality perceptions

Research Question 2:

What are advertisers' perceptions regarding service quality in the advertising industry in terms of the five service quality dimensions?
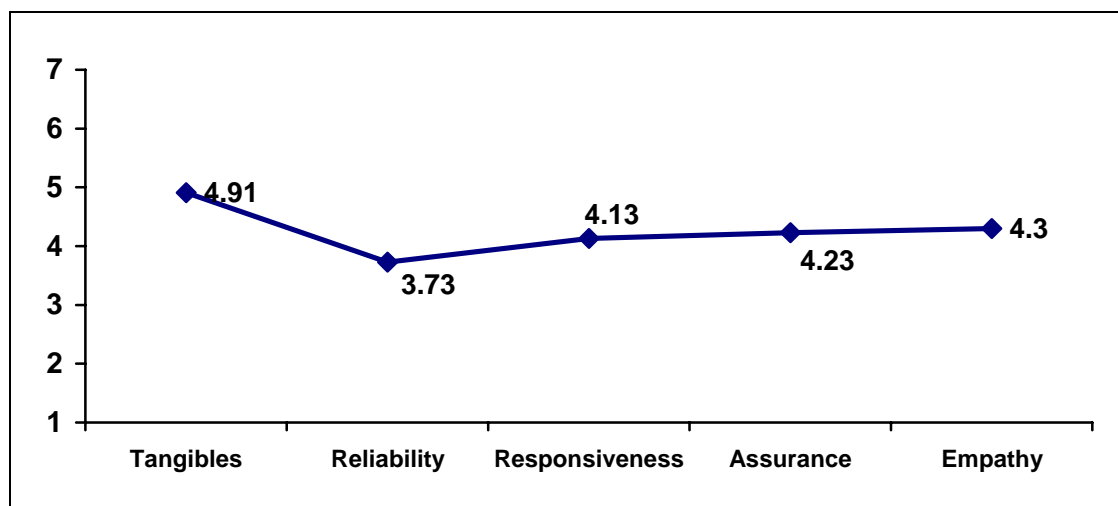
Figure 6-7: Mean score on SERVQUAL dimensions: perception

As depicted in figure 6.7, the mean score for the reliability dimension is the lowest followed by the responsiveness dimension. The tangibles dimension had the highest score of 4.91. Assurance and empathy were rated closely together with scores of 4.23 and 4.30 respectively.

6.6 Service quality dimension correlation

Research Question 3:

Are the five service quality dimensions interrelated?

Table 11: Correlation between Gap scores for different service quality dimensions

	Tangibles		Reliability		Responsiveness		Assurance	
	Pearson Correlation	Sig. (2-tailed)	Pearson Correlation	Sig. (2-tailed)	Pearson Correlation	Sig. (2-tailed)	Pearson Correlation	Sig. (2-tailed)
Tangibles	**1.00**							
Reliability	0.04	0.81	**1.00**					
Responsiveness	0.02	0.89	0.60	0.00	**1.00**			
Assurance	0.35	0.02	0.49	0.00	0.66	0.00	**1.00**	
Empathy	0.18	0.27	0.37	0.02	0.55	0.00	0.62	0.00

With the exception of tangibles, all service quality dimensions correlate with one another. This indicates that the larger the gap in one dimension, the larger the gap in another dimension as well. The tangibles dimension only correlated with the assurance factor ($p = 0.002$).

6.7 Service quality gap analysis

Research question 4:

Is the advertising industry's perceived service quality at, above or below the expectations of clients?
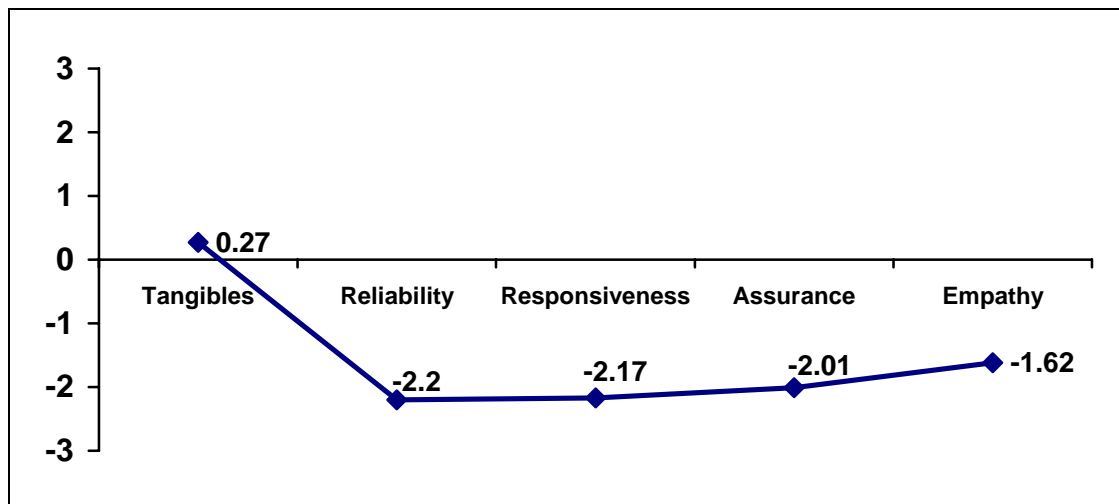
Figure 6-8: Gap scores of five SERVQUAL dimensions

All dimensions, with the exception of tangibles, show negative gap scores. Reliability shows the largest gap score (-2.2), followed by responsiveness and assurance. The tangibles factor was the only dimension to score a positive gap (0.27).

6.7.1 Comparing male and female Gap scores

When comparing males and females on their gap scores, it appears that there are no significant differences and both gender groups have similar views of agency performance relative to expectations.

Table 12: Independent t-test for differences in mean Gap scores: males and females

Dimensions	t-value	p-value
Tangibles	-0.07	0.942
Reliability	-0.97	0.336
Responsiveness	0.47	0.640
Assurance	0.15	0.880
Empathy	0.62	0.541

6.7.2 Relationship between industry experience and Gap scores

Responses from respondents with different industry experience were compared in terms of the different gap scores.

Table 13: ANOVA test for differences in mean Gap scores: industry experience

Dimensions	f-value	p-value
Tangibles	0.48	0.041
Reliability	1.30	0.284
Responsiveness	3.37	0.045
Assurance	3.74	0.033
Empathy	0.68	0.514

Table 13 indicates that there are significant differences between the experience groups in terms of three of the five dimensions: Tangibles (p=0.041), Responsiveness (p = 0.045) and Assurance (p = 0.033)
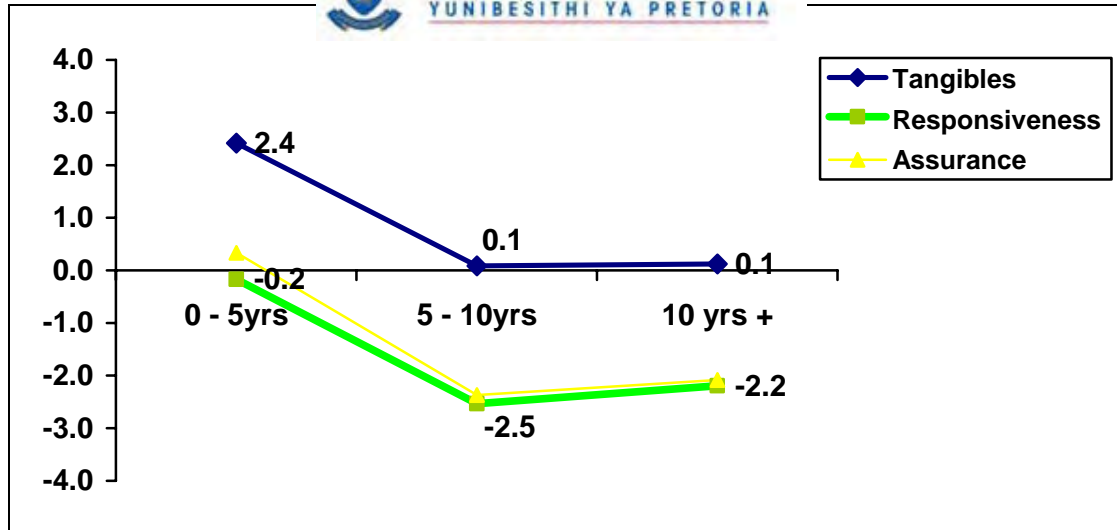
Figure 6-9: Mean score on tangibles, assurance and responsiveness Gap scores for different experience groups

Figure 6.9 shows the mean gap scores for each of these dimensions per experience group. The gap scores are smaller for the 0-5 years experience group, indicating that they have a more favorable opinion of the performance of the advertising industry relative to their expectations.

6.8 Summary of chapter six

This concludes the summary of the findings from the survey. The analysis of the data in this chapter is discussed in chapter seven.

Chapter 7   Discussion of results

Chapter seven discusses the results of the survey in detail. In line with the objective of the study, the main areas of discussion concern expectations and perceptions of service quality and its dimensions: tangibles, reliability, responsiveness, assurance and empathy. Although, the subjective nature of services makes the service concept difficult to measure, the survey made use of a recognised service quality measurement tool, SERVQUAL, to analyse findings and make recommendations (Parasuraman et al., 1988).

7.1 Demographic profile

Responses to the questionnaire provided a demographic and organisational profile of the respondents. Survey participants were requested to indicate their age, gender, job descriptions, industry classifications as well as number of years marketing experience.

The highest response rate (number of respondents per job position) came from marketing managers (37%) and marketing directors (22%). In addition, the majority of the respondents (93%) came from individuals that had in excess of 5 years marketing experience; with only 7% of the respondents reported that they had 5 years or less experience. This suggests that, from a

work experience pers quate skills to assess

service quality expectations and perceptions within the advertising industry.

There was satisfactory industry representation, gender split and distribution of age across the sample. The majority of the respondents worked for consumer goods, financial services, and food and beverages industry sectors; with two thirds of the respondents aged between 30 and 44 years (75%). There were significantly fewer responses from respondents under 29 years and over 45 years of age. Females represented 61% of the total sample.

7.2 Reliability

Reliability analysis (Cronbach's alpha) was calculated to test the reliability and internal consistency of each factor. The results showed that alpha coefficients of the factors were above 0.70, with the exception of the "reliability" factor which had a score of 0.680. The alpha coefficients are therefore well above the minimum value of 0.50 considered acceptable as an indication of reliability for basic research (Nunnally, 1978). Thus, all five service quality dimensions can be considered theoretically appropriate, corresponding to the findings published by Parasuraman et al. (1988)

7.3 Research question 1

What are advertisers' expectations regarding service quality in the advertising industry in terms of the five service quality dimensions?

In the first section of the questionnaire, respondents were requested to indicate their expected level of service from advertising agencies by answering 22 questions covering the five dimensions of service quality – tangibles, reliability, responsiveness, assurance and empathy (Parasuraman et. al, 1988).

The service quality dimensions of responsiveness and assurance had the highest mean scores of 6.30 and 6.24 respectively, indicating that these are the two dimensional factors rated as most important for an advertising agency to be classified as an "excellent" organisation. However, these dimensions were closely followed by reliability and empathy with scores of 5.94 and 5.91 respectively. The tangibles dimension was the least important factor for an advertising agency to be classified as "excellent", with a mean score of 4.64.

In terms of tangibles and assurance factors, there was a significant difference between respondent's scores with dissimilar number of years marketing experience. Respondents with between 0 and 5 years experience in marketing were more likely to rate tangibility and assurance factors significantly lower than respondents with more years experience.

The second section
the advertiser's most important service quality dimension and their least important dimension. Respondents were asked to allocate 100 points amongst the five dimensions.

Interestingly, while reliability had an average mean score less than that of responsiveness and assurance in the first section, it was rated the highest in this section with an average mean of 32.4%. This result was supported by the ranking of dimensions by advertisers. Reliability was positioned as the most important factor, rated as such by 59% of respondents. In total 86% of the survey felt that reliability was one of the top two most important factors, and none considered it the least important. Again, the tangibles factor was ranked the least important dimension with 80% indicating as such and none placing it first or second in terms of importance.

Consequently, when weighting the advertisers' expectations of the five service dimensions, according to the mean ranking scores, reliability emerges as the most important factor, closely followed by responsiveness and assurance. The empathy factor is ranked fourth, with the tangibles factor as the least important dimension in terms of advertiser's service quality expectations.

Therefore, the factor that has the greatest impact on the advertisers' expectations of overall service quality, within advertising agencies, is the reliability factor (mean score of 32.4) encompassing elements of providing services timeously, getting work done right the first time, showing a sincere

interest in solving pr   e records. This was
closely followed by responsiveness factors made up of the provision of prompt
and accurate service as well as a willingness to help while responding to
specific needs.

It is notable that advertisers place such emphasis on the importance of
reliability and responsiveness in the service quality management of
advertising agencies. Published data indicates that this is the norm in high
customer contact businesses (Parasuraman et al., 1990) and figure 2.2
underscores this link. Zeithaml et al, 1990 states that customers' expectations
of service quality are influenced, amongst others, by personal needs and past
experience i.e. how the service is enacted. Thus, these factors need to be
managed to improve the service quality within the advertising industry.

7.4 Research question 2

What are advertisers' perceptions regarding service quality in the advertising industry in terms of the five service quality dimensions?

As identified in the literature review, the SERVQUAL approach was formulated on the principle that customers have expectations of service performance; they observe the performance and later form perceptions about the performance received (Sureshchandar & Rajendran, 2001). In addition, Rust and Oliver (1994) note that the SERVQUAL instrument captured the crux of what service quality might mean, i.e. a comparison to excellence in service by the customer.

Meister (1990) notes that in a service setting, customers judge quality by comparing perceptions of what they would like to receive with their expectations of what they should receive. Similarly, Edvardsson (2005) highlights that service quality is perceived and determined by the customer on the basis of co-production, delivery and consumption experiences. Thus measuring the quality of service delivery as perceptions of the user is appropriate for assessing the quality of services.

Based on the above tenet, the third section of the questionnaire aimed to understand the advertisers' perceptions of the service they receive from their current advertising agencies by measuring actual service experienced against the five service quality dimensions.

As depicted in figure 6.7, when measuring advertisers perceptions of service quality received, the reliability factor was ranked lowest followed by the responsiveness factor. A low score indicates a low level of service quality experienced. The tangibles dimension had the highest score of 4.91. Assurance and empathy were rated closely together with scores of 4.23 and 4.30 respectively.

Thus, in terms of the five service quality dimensions, advertising agencies performance is poor in terms of reliability, followed by responsiveness, assurance and empathy, with only tangibles achieving a satisfactory score of above 4.50 out of 7.0.

7.5 Research question 3

Are the advertising industries service quality dimensions interrelated?

To improve service quality, the advertising industry needs to understand which service attributes influence advertisers' intentions. Failure to give sufficient attention to these attributes may result in an advertiser's negative evaluation of an advertising agency's service.

Notably, with the exception of the tangibles factor, all service quality dimensions correlate with one another, as shown in table 11. Therefore, each dimension influences the other and the larger the gap in one dimension; the bigger the gap in the other dimensions. This signifies the interrelatedness of the four dimensions, excluding tangibles, and the importance of ensuring improvements in all dimensions to influence perceived service quality.

7.6 Research question 4

Is the advertising industry's perceived service quality at, above or below the expectations of clients?

The research objective was to examine the needs of South African advertisers by measuring and analysing service quality, identifying the quality dimensions that are most important to them, ranking the dimensions in order of importance and making recommendations thereof.

In 1987, Lewis suggested that measuring the difference between expectations and perceptions, defined as perceived quality, can determine the level of satisfaction with the service received. Zeithaml and Bitner (2003) also noted that it is important to manage the gaps that exist between expectations and perceptions when managing service quality. As indicated in Figure 2.1, the most important gap (Gap 5) is that which exists between customer's expectation of service and their perception of the service actually delivered (Lau et al, 2005). Thus, the customer's perceptions of the level of service performance that meets their expectations will reflect on the quality of service provided by the organisation.

In this study, all dimensions, with the exception of tangibles, showed negative gap scores indicating that the actual service performance of the advertising industry is below the standard of expectations from advertisers (Figure 6.8). The reliability dimension showed the largest gap score (-2.2), followed by responsiveness and assurance dimensions respectively. This corroborates Xate's assertion that there is a lack of trust and mutually beneficial partnerships between agencies and their clients in South Africa (Xate, 2006).

Analysis of the perceptions and expectations gaps reveals that the advertising industry performs weakest against the dimension which is ranked as the most important by advertisers i.e. reliability factor. In addition, the responsiveness factor, ranked as the second most important dimension by advertisers, shows the second largest gap. Similarly, the third most important factor - assurance - scores slightly behind the responsiveness factor in terms of the size of the gap between expectations and perceptions. This confirms the notion that advertising agencies are becoming the weakest link in the marketing chain as they are unable to deliver what advertisers want (Crain, 2004).

The study also revealed that the longer advertisers were in the industry, the larger the gap between service performance expectations and perceptions. The gap scores are smaller for advertisers with 0-5 years experience, indicating that they have a more favourable impression of agencies' current service performance, relative to their expectations, when compared to those advertisers with more than 5 years experience.

- Tangibles

Analysis of the tangibles factor reveals that there was a positive gap between advertiser expectation and perceptions for this dimension. However, tangibility elements such as up-to-date work methods, physical facilities, personnel appearance and materials associated with advertising agencies' service were ranked as least important in terms of advertisers' expectations. However, the advertising industry scored high on this dimension when measuring perceptions. Thus, it can be concluded that the advertising industry is exceeding the perceptions of advertisers on a dimension which is ranked as least important to them.

- Reliability

The information in Figure 6.8 highlights the large differences in perceptions of advertisers with their respective agencies on the reliability dimension. Element-wise, the industry does not perform to advertisers' expectations in terms of timeous delivery of services, error-free records and getting work done right the first time. Importantly, this dimension was ranked as most important in terms of expectations and achieved the lowest score in terms of perceptions of advertisers. Therefore it is evident that the advertising industry performs significantly below expectations in terms of solving problems to their customers' satisfaction.

- Responsivenes

There is significant perceptual differences on the responsiveness dimension of service quality. The factor was ranked as second most important in terms of expectations and scored second lowest in terms of perceptions, achieving a gap score of -2.17 (Figure 6.8). Element-wise, advertisers expect the advertising industry to provide prompt service, responding to requests and to always be willing to help. The advertising industry performs well below the expectations of advertisers in terms responsiveness criteria. Interestingly, respondents with fewer years experience (0-5 years) had a more favourable opinion of the performance of the advertising agency relative to their expectations in terms of the responsiveness dimension.

- Assurance

The perceptual difference between advertising agencies and their customers on assurance is high as evidenced in Figure 6.8. The dimension was ranked as third most important in terms of expectations and was ranked third lowest in terms of perceptions of advertisers, achieving a gap score of –2.01. Notable is that 24 % of the sample indicated this dimension as the second most important, highlighting the significance of this factor to the advertising industry. This underscores that advertising agencies do not exceed customer expectations in terms of ability to answer questions knowledgeably, instilling

confidence in c
confidence in dealings

with advertising agencies.

- Empathy

The data analysis reveals that the South African advertising industry again performs below the expectations of its customers. Although the dimension was not ranked as important by advertisers, with 15% of the respondents ranking this dimension as least important (Figure 6.6), the advertising industry performs far below customer expectations achieving a gap score of -1.62. Element-wise analysis shows that the advertising agency is not exceeding expectation perceptions of its customers with regards individualised attention and understanding specific needs.

7.8 Summary of chapter seven

The intent of this study was to increase the comprehension of the expectations and perceptions of the advertising industry's service quality from an advertisers' perspective. The results of the survey clearly reveal that the industry falls far below the perceptions of its customers on all dimensions of service quality, barring tangibility elements. Advertisers assign different levels of importance to service quality dimensions when evaluating service quality in the advertising industry (Lau et al., 2005). However, what is clear is that there is no single factor that will ensure service quality success. The interrelatedness of reliability, responsiveness, assurance and empathy requires the industry to focus on a wide range of corrective actions incorporating all elements within these dimensions.

Chapter 8   Conclusion and Recommendations

Chapter eight explains the conclusions and recommendations from the study. The service sector has grown exponentially in economies throughout the world, and with it a quality of service revolution has taken place. Service quality has become a field for strategic development, an important ingredient in the business idea and a vital management task at all levels (Edvardsson, 1998).

Consequently, service quality is an exciting and growing concept for the South African advertising industry; however, very little research has been conducted into the relationships between advertising agencies and their clients. The aim of this study was to increase the comprehension of the expectations and perceptions towards service quality within the advertising industry, from the advertisers' perspective.

8.1 Main findings

In general, the SERQUAL instrument was applicable for evaluating the South African advertising industry's service quality. The study revealed that the customers' perceptions of service quality were consistently not meeting their expectations across all service quality dimensions, with the exception of tangibles. Reliability was identified as the most important dimension, followed

by responsiveness, as was perceived as the least important dimension.

Zeithaml and Bitner (2003) noted that in order to manage service quality, it is important to manage the gaps that exist between expectations and perceptions. Thus, the customer's perceptions of the level of service performance that meets their expectations will reflect on the quality of service provided by the organisation.

In this study, all dimensions, with the exception of tangibles, showed negative gap scores indicating that the actual service performance of the advertising industry is below the standard of expectations from advertisers. The reliability dimension showed the largest gap score, followed by responsiveness and assurance dimensions respectively. Therefore, analysing the perceptions and expectations gaps reveals that the advertising industry performs weakest against the dimension which is ranked as the most important by advertisers i.e. reliability. In addition, the responsiveness factor, ranked as the second most important dimension by advertisers, shows the second largest gap. Similarly, the third most important factor - assurance - scores slightly behind the responsiveness factor in terms of the size of the gap between expectations and perceptions.

Crain (2004) argued that advertising agencies are becoming the weakest link in the marketing chain as they are unable to deliver what advertisers want. The negative customer gap (Gap 5) across the factors suggests that this assertion is true and that agencies should devote more effort to improving service quality levels throughout the advertising industry in South Africa.

This is in line with Lau and Fie's (2005) assertion that service success depends on understanding the critical factors that determine customer satisfaction, and ensuring that the business meets or exceeds customers' expectations.

In the quest for improved service quality, the advertising industry needs to understand the factors of service quality advertisers considered significant when evaluating an agencies service performance. Failure to give sufficient attention to these attributes may result in an advertiser's negative evaluation of an advertising agency's service. The study found that, with the exception of the tangibles factor, all service quality dimensions correlate with one another. Thus, each dimension influences the other and the larger the gap in one dimension; the bigger the gap in the other dimensions. This signifies the interrelatedness of the four dimensions, excluding tangibles, and the importance of ensuring improvements in all dimensions to influence perceived service quality.

8.2 Recommendations

The findings of the study are interesting in the context of service quality research and should lead agency management to investigate investments needed to fulfill customers' expectations and thus ensure customer satisfaction. The recommendations are based on the results generated by the quantitative analysis.

Utilising the result of the survey, advertising agencies can implement effective marketing strategies to target advertisers in South Africa, satisfying them when they appoint the agency and developing customer loyalty for the agency's services in the long term.

Researches have argued that service providers should deviate from the "zero defect" approach and, instead of giving attention to all aspects of service operations, should focus on the "key factors" that will determine service performance success; concentrating resources on these critical success factors (Juwaheer, 2004 p. 360). The findings of this study have revealed that, only by focusing on these factors, can the advertising industry achieve high levels of satisfaction and service quality.

The survey results clearly show that the advertising industry needs to invest heavily in service quality improvement. Advertising agencies should continuously assess and reassess how customers perceive their services, ascertaining whether they are meeting, exceeding or are below the expectations of their customers. This is a difficult task as customer service is complex in nature, dynamic in action and can vary greatly from one agency to another (Bhat, 2005). Importantly, Bhat goes on to state that what is perceived as 'good service' today, might become 'indifferent service' tomorrow and 'bad service' in the future. Thus, frequent customer surveys are necessary as they allow organisations to ratify and refine service actions, improving service quality in the industry.

Advertising management should concentrate attention and resources on service quality areas that have the highest importance for overall satisfaction and rating of service quality within the advertising industry. Non-core aspects of service quality should not be ignored and managers should attempt to achieve "good-enough" scores from advertisers for these aspects.

The implication of the above is that the advertising industry should concentrate efforts on improving items in the reliability dimension, which consists more of the functional aspects of service quality i.e. how it is done, rather than the technical aspects i.e. what is done (Mei, Dean and White, 1999).

In order to do so, the industry will need to allocate time and resources to the following actions:

- Heavy investment in reliability and responsiveness through the training and development of staff to ensure that procedure and process improvements (what is done) match customers' delivery requirements and expectations (how it is done);

- Ensuring a clear vision for quality within the industry. Individual interpretations of service quality will result in reliability inconsistency as well as variability of treatment, and consequently poor quality perceptions (Ghobadian, 1994);

- Employee training focused on the potential failure points and service recovery procedures. Service quality can be enhanced by giving staff the latitude to make important decisions regarding customer needs, empowering them to exercise responsibility, judgment and creativity in responding to advertisers' problems (Bhat, 2005);

- Service quality is dependent on people, and attitudes or beliefs take longer to change than procedures. Management needs to devote sufficient time and have more interaction with advertisers and staff to understand their needs and expectations;

- Finally, advertiice quality actions to key items from particular dimensions that are applicable to the agency, rather than on strategies that are broadly applied across the whole service quality dimension (Juwaheer, 2004).

The advertising industry needs to match perceived service with expected service to manage service quality. To keep the gap between expected service and perceived service to a minimum it is important that the service quality promises, demonstrated through traditional marketing activities and communicated through word of mouth, must not be unrealistic when compared to the actual service delivery that advertisers will eventually experience (Bhat, 2005). Efforts by the advertising industry to improve service quality must not only attempt to equalise expectations and perceptions, but should ensure that agencies provide levels of service which exceed advertisers' expectations.

8.3 Further research

The study has several limitations detailed in Chapter 3. Regardless of these, it has the potential to provide a foundation for future research, focused on a better understanding of how the advertising industry should be structured to provide outstanding customer satisfaction through service quality.

- Firstly, the study was conducted in the advertising industry as a whole not taking into account the various sub-industries within the sector. The study could be replicated across these various advertising disciplines, such as public relations industry and the media industry, to ascertain differences or similarities in service quality perceptions across these sectors.

- The study could be replicated in advertising industries outside of South Africa and results could be compared with this study to check whether the model used in this study is valid.

- Research could be aimed at refining the research instruments to provide the advertising industry with a better means of predicting advertisers' perceptions in relation to service quality.

- Finally, the study shows that professional services are worthy of study, and future research could include comparisons against services performed by consultants, accountants, lawyers or architects.

8.4 Summary of chapter eight

Chapter eight indicated that service quality is a vital approach for the South African advertising industry to deliver exponential growth and improved profits. However, the gap between advertisers' expectations of service quality and perceptions of service delivered is cause for concern. The industry requires a clear vision and strategy, focused on service quality improvements that incorporate investment, on-going measurement, top management involvement and employee training. This will result in service quality actions centered on the identification of weaknesses, allowing the industry to match advertisers' perceived and expected service quality performance requirements.

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Appendix 1   Comparison of SERVQUAL, SERVPERF and Normed Quality Methods

	SERVQUAL Parasuraman, Zeithaml, and Berry (1991)	SERVPERF Cronin and Taylor (1992)	Normed Quality Teas (1993)
Theoretical background	The determinants method of service quality and gap theory. Service quality is calculated as the difference between perceptions and expectations with importance weights given to each dimension.	Service quality is evaluated by perceptions only, without expectations and without importance weights.	Service quality involves the redefinition of expectations to discrimination between ideal expectations and feasible expectations.
Data collection sample features	Two telephone companies, two insurance companies, two banks	Two banks, two pest control firms, two laundries, two fast food outlets	Three department stores

	SERVQUAL Parasuraman, Zeithaml, and Berry (1991)	SERVPERF Cronin and Taylor (1992)	Normed Quality Teas (1993)
Sample size	290 to 487 according to companies	660	120
Items number (E-P)	22+22	22	10+10+10+10+10
Response scale	7-point semantic differential	7-point semantic differential	7-point semantic differential
Dimensions importance	Weight evaluation with constant sum	Weights evaluation with constant sum	Weights evaluation with constant sum
Questionnaire dispensing	Mail	Mail	Interview

	SERVQUAL Parasuraman, Zeithaml, and Berry (1991)	SERVPERF Cronin and Taylor (1992)	Normed Quality Teas (1993)
Customer-tool interference degree	High	High	High
Idiosyncratic effect	High	Medium	High
Data pre-elaboration	Scalarisation	Scalarisation	Scalarisation
Data analysis	Factorial analysis followed by oblique rotation	Factorial analysis followed by oblique rotation	Factorial analysis followed by oblique rotation

	SERVQUAL Parasuraman, Zeithaml, and Berry (1991)	SERVPERF Cronin and Taylor (1992)	Normed Quality Teas (1993)
Reliability: Cronbach's alpha coefficient	0.8 to 0.93	0.63 to 0.98	Calculated other validity and reliability coefficients
Dimensions number	Five: Tangibles, Reliability, Assurance, Responsiveness, Empathy	Five: Tangibles, Reliability, Assurance, Responsiveness, Empathy	Five: Tangibles, Reliability, Assurance, Responsiveness, Empathy

Source: Adapted from Franceschini et al., 1998

Appendix 2   2006 Top 100 companies according to media spend

Rank	Company	Spend (R mil)
1	MTN	353,2
2	Shoprite Checkers	304,2
3	Lever Ponds	277,5
4	Pick 'n Pay	264,5
5	Vodacom	253,8
6	Firstrand	229,0
7	SABMiller	223,1
8	ABSA	196,2
9	Standard Bank	192,8
10	JD Group	188,5
11	Government National	178,4
12	Cell C	157,5
13	Coke-Cola	157,1
14	Ford Motor Company	147,2
15	Edcon	144,7
16	KFC	143,1
17	Proctor & Gamble	134,6
18	Distell	132,9
19	UBR	130,0
20	Spar	125,3
21	New Clicks	122,2
22	Reckitt & Benckiser	119,0
23	Mass Stores	118,9
24	Clover SA	114,0
25	Telkom SA	107,6
26	Tiger Brands	98,2
27	Relyant Retail	97,1
28	Multi-Choice Africa	95,3
29	Nokia Communcations	93,3
30	Brandhouse	92,8
31	Nedbank	90,6
32	Old Mutual	86,8
33	Glomail Order	85,6
34	Ster-Kinekor	85,6
35	General Motors	80,8
36	Foshini Group	79,5
37	Verimark	79,2
38	Adcock Ingram	78,5
39	L'Oreal	77,8
40	Government KZN	77,6
41	Toyota SA	74,3
42	Outsurance Insurance	73,0
43	Daimler Chrysler SA	72,1
44	Music for Pleasure	71,8
45	Pepkor	69,4
46	Uthingo Management	68,0
47	Liberty Life	67,6
48	NU Metro Film Distribution	66,5
49	Smithkline Beecham	64,0
50	Kelloggs Co SA	63,3

Rank	Company	Spend (R mil)
51	Samsung Products	62,2
52	Beiersdorf Consumer Produ	61,9
53	Sanlam	58,6
54	National Brands	58,6
55	Media 24	58,0
56	Volkswagen	57,6
57	Homemark Mail Order	57,4
58	e.tv	55,3
59	Altech Technology	54,4
60	Love Life	54,3
61	SABC	53,9
62	Sapo	51,0
63	Nashua	50,0
64	Nissan SA	49,6
65	Shell SA	48,6
66	LG Electronics	47,5
67	Hyundai Car Dealers	46,1
68	Colgate Palmolive	46,0
69	Government Gauteng	45,6
70	Simba	45,1
71	Revlon SA	44,9
72	Sun International	44,5
73	Nestle	43,4
74	Hyundai SA	43,2
75	Ackermans	42,9
76	iTouch Cellular	42,5
77	SAA	42,0
78	Reliable Hawker	41,8
79	Motorola SA	41,7
80	Engen	40,1
81	Gillette SA	39,9
82	McCarthy Dealers	39,7
83	Woolworths	39,3
84	BMW SA	38,3
85	Santam	37,1
86	Imperial Motors	36,9
87	Renault Afr	36,7
88	IEC Voter Education	36,0
89	Sasol SA	35,8
90	Pioneer Foods	35,4
91	Momentum Life Assurance	35,4
92	Budget Insurance	34,7
93	SC Johnson	34,6
94	Eskom	33,7
95	Ellerines Furnishers	33,2
96	Mr Price Grioup	33,0
97	McDonald's Fast Foods	33,0
98	Governemennt Western Ca	32,9
99	BP SA	32,6
100	Peugot SA	32,2

Completed Questionnaires	
1	Transportantion
9	Consumer Goods
3	Telecommunications
9	Food and Beverages
4	Retail
3	Entertainment
1	Industrial
2	Automotive
9	Financial Services

Source: Financial Mail Adfocus (2006)

Appendix 3   Questions relating to service quality factors

SECTION 1	Ques	
Tangibles	1	Excellent advertising agencies will have up-to-date work methods
	2	The physical facilities at excellent advertising agencies will reflect the nature of the business
	3	Personnel at excellent advertising agencies will be stylish in appearance
	4	Materials associated with the service will be visually appealing in excellent advertising agencies
Reliability	5	When excellent advertising agencies promise to do something by a certain time they will do so
	6	When a client has a problem, excellent advertising agencies will show a sincere interest in solving it
	7	Excellent advertising agencies will get things right the first time
	8	Excellent advertising agencies will provide their services at the time they promised to do so
	9	Excellent advertising agencies will insist on error-free records
Responsiveness	10	Personnel in excellent advertising agencies will tell clients exactly when the service will be performed
	11	Personnel in excellent advertising agencies will give prompt service to clients
	12	Personnel in excellent advertising agencies will always be willing to help clients
	13	Personnel in excellent advertising agencies will never be too busy to respond to clients' requests
Assurance	14	The behaviour of personnel in excellent advertising agencies will instill confidence in clients
	15	Clients of excellent advertising agencies will feel safe in their dealings with the agency
	16	Personnel in excellent advertising agencies will be consistently courteous with clients
	17	Personnel in excellent advertising agencies will have the knowledge to answer clients' questions
Empathy	18	Excellent advertising agencies will give clients individual attention
	19	Excellent advertising agencies will have operating hours convenient to all their clients
	20	Excellent advertising agencies will have staff who give clients personal attention
	21	Excellent advertising agencies will have the clients best interests at heart
	22	The personnel of excellent advertising agencies will understand the specific needs of their clients

SECTION 3	Ques	
Tangibles	1	My advertising Agency has have up-to-date work methods
	2	The physical facilities at my advertising agency reflects the nature of the business
	3	Personnel at my advertising agency are stylish in appearance
	4	Materials associated with the service are be visually appealing in my advertising agency
Reliability	5	When my advertising agency promise to do something by a certain time they will do so
	6	When I have a problem, my advertising agency will show a sincere interest in solving it
	7	My advertising agency gets things right the first time
	8	My advertising agency provides their services at the time they promised to do so
	9	My advertising agency insists on error-free records
Responsiveness	10	Personnel in my advertising agency will tell me exactly when the service will be performed
	11	Personnel in my advertising agency will give me prompt service
	12	Personnel in my advertising agencies are always willing to help me
	13	Personnel in my advertising agencies are never be too busy to respond to my requests
Assurance	14	The behaviour of personnel in excellent advertising agencies instills confidence in me
	15	I feel safe in their dealings with my agency
	16	Personnel in my advertising agency areconsistently courteous with me
	17	Personnel in my advertising agency have the knowledge to answer my questions
Empathy	18	My advertising agencies gives me individual attention
	19	My advertising agencies has operating hours convenient to me
	20	My advertising agency has staff who give me personal attention
	21	My advertising agencies has my best interests at heart
	22	The personnel of my advertising agencies understand my specific needs

Appendix 4   Service Quality Questionnaire

Andrew Shuttleworth

From: Andrew Shuttleworth
Sent: Tuesday, August 22, 2006 9:38 AM
To: MBA Questionnaire Respondents
Subject: Gordon Institute of Business: MBA Questionnaire

Dear Marketer,

I am a student at the Gordon Institute of Business - University of Pretoria - completing my MBA and require your assistance with the following research.

Numerous South African advertising practitioners are concerned about the perceived misalignment between advertisers' service expectations and advertising agencies' service delivery. The purpose of this research is to measure service quality in advertising agencies and identify the quality dimensions that are most important to advertisers like you.

Please click on the link below and complete the questionnaire – it should take you no more than 10 minutes: http://www.peoplesurveys.com/S.aspx?ID=1762

Instructions:

1. Use your mouse and left click inside the buttons that reflects your score for each question;

2. You may or may not fill in your name (results of the survey will be treated as confidential). Click inside the box and type your name;

3. You may leave any remarks about the survey at the end of the questionnaire. Once complete, please click on the send button.

Your assistance is appreciated,

Regards,

Andrew Shuttleworth

Cell: 083-635-4253

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Section One

1. Please type in your name below.

Your Name:

Based on your experiences as a client of an advertising agency/ies, please think about the kind of agency that would deliver excellent quality of service. Think about the kind of agency that you **would like to use**.

Please show the extent to which you think such an agency would possess the feature described by each statement.

- If you feel a feature is *not at all essential* for excellent advertising agencies such as the one you have in mind, tick the first radio button.
- If you feel a feature is *absolutely essential* for excellent advertising agencies, choose the last radio button.
- If your feelings are less strong, choose one of the radio buttons in the middle.
- There is no right or wrong answer - all we are interested in is the number that truly reflects your feelings regarding **agencies that would deliver excellent service.**

2. SOUTH AFRICAN ADVERTISING INDUSTRY

	Strongly Disagree						Strongly Agree
Excellent advertising agencies will have up-to-date work methods.	O	O	O	O	O	O	O
The physical facilities at excellent advertising agencies will reflect the nature of the business.	O	O	O	O	O	O	O
Personnel at excellent advertising agencies will be stylish in appearance.	O	O	O	O	O	O	O
Materials associated with the service (such as credentials, presentations etc) will be visually appealing in excellent advertising agencies.	O	O	O	O	O	O	O
When excellent advertising agencies promise to do something by a certain time they will do so.	O	O	O	O	O	O	O
When a client has a problem, excellent advertising agencies will show a sincere interest in solving it.	O	O	O	O	O	O	O
Excellent advertising agencies will get things right the first time.	O	O	O	O	O	O	O
Excellent advertising agencies will provide their services at the time they promise to do so.	O	O	O	O	O	O	O
Excellent advertising agencies will insist on error-free records.	O	O	O	O	O	O	O
Personnel in excellent advertising agencies will tell clients exactly when services will be performed.	O	O	O	O	O	O	O
Personnel in excellent advertising agencies will give prompt service to clients.	O	O	O	O	O	O	O
Personnel in excellent advertising agencies will always be willing to help clients.	O	O	O	O	O	O	O
Personnel in excellent advertising agencies will never be too busy to respond to clients' requests.	O	O	O	O	O	O	O
The behavior of personnel in excellent advertising agencies will instill confidence in clients.	O	O	O	O	O	O	O

Clients of excellent advertising agencies will feel safe in their dealings with the agency.	○	○	○	○	○	○	○
Personnel in excellent advertising agencies will be consistently courteous with clients.	○	○	○	○	○	○	○
Personnel in excellent advertising agencies will have the knowledge to answer clients' questions.	○	○	○	○	○	○	○
Excellent advertising agencies will give clients individual attention.	○	○	○	○	○	○	○
Excellent advertising agencies will have operating hours convenient to all their clients.	○	○	○	○	○	○	○
Excellent advertising agencies will have staff who give clients personal attention.	○	○	○	○	○	○	○
Excellent advertising agencies will have the clients' best interests at heart.	○	○	○	○	○	○	○
The personnel of excellent advertising agencies will understand the specific needs of their clients.	○	○	○	○	○	○	○

Section Two

Listed below are 5 features pertaining to advertising agencies and their service. We would like to know how important each of these features is to *you* when you evaluate the service offered by an advertising agency. Please allocate a total of 100 points among the 5 features *according to how important each feature is to you* - the more important a feature is to you, the more points you should allocate to it. Please ensure that the points you allocate to the 5 features add up to 100.

3. The 5 Features:

1. The appearance of the advertising agency's physical facilities, equipment, personnel and communication materials.

2. The advertising agency's ability to perform the promised service dependably and accurately.

3. The advertising agency's willingness to help clients and provide a prompt service.

4. The knowledge and courtesy of the advertising agency's personnel and their ability to convey trust and confidence.

5. The caring, individualized attention the advertising agency provides its clients.

Remainder:

4. Which one feature of the above five is most important to you?

5. Which feature is second most important to you?

6. Which feature is least important to you?

Section Three

The following set of statements relate to your feelings about the **actual advertising agency you use**. For each statement, please show the extent to which you believe the advertising agency has the feature described by the statement.

Once again, choosing the first radio button means that you strongly disagree that the advertising agency you have used has this feature and choosing the 7th means that you strongly agree. You may choose any of the radio buttons in the middle that show how strong your feelings are. There is no right or wrong answer - all we are interested in is a number that **best shows your perceptions about the advertising agency that you currently use.**

7. SOUTH AFRICAN ADVERTISING INDUSTRY (2)

	Strongly Disagree						Strongly Agree
My advertising agency has up-to-date work methods.	O	O	O	O	O	O	O
The physical facilities at the advertising agency reflect the nature of the business.	O	O	O	O	O	O	O
Personnel at my advertising agency are stylish in appearance.	O	O	O	O	O	O	O
Materials associated with the service (such as credentials, presentations etc) are visually appealing.	O	O	O	O	O	O	O
When my advertising agency promises to do something by a certain time they it does so.	O	O	O	O	O	O	O
When I have a problem, my advertising agency shows a sincere interest in solving it.	O	O	O	O	O	O	O
My advertising agency will get things right the first time.	O	O	O	O	O	O	O
My advertising agency provides their services at the time they promise to do so.	O	O	O	O	O	O	O
My advertising agency insists on error-free records.	O	O	O	O	O	O	O
Personnel in my advertising agency tell me exactly when services are performed.	O	O	O	O	O	O	O
Personnel in my advertising agency give me prompt service.	O	O	O	O	O	O	O
Personnel in my advertising agency are always willing to help me.	O	O	O	O	O	O	O
Personnel in my advertising agency are never being too busy to respond to my requests.	O	O	O	O	O	O	O
The behavior of personnel in my advertising agency instills confidence in me.	O	O	O	O	O	O	O
I feel safe in my dealings with my advertising agency.	O	O	O	O	O	O	O
Personnel in the advertising agency are consistently courteous with me.	O	O	O	O	O	O	O
Personnel in the advertising agency have the knowledge to answer my questions.	O	O	O	O	O	O	O

My advertising agency gives me individual attention.	○	○	○	○	○	○	○
My advertising agency has operating hours convenient to me.	○	○	○	○	○	○	○
My advertising agency has personnel who give me personal attention.	○	○	○	○	○	○	○
My advertising agency has my best interests at heart.	○	○	○	○	○	○	○
The personnel of my advertising agency understand my specific needs.	○	○	○	○	○	○	○

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Service Quality Questionaire

Please select your demographics from the drop down boxes below,
then click the "Submit" button when you are done.

(All fields are required)

Age:

Gender:

Designation:

Industry:

Marketing Experience:

Submit

Thank you for taking the time to complete this survey, you may leave a comment on the entire survey if you wish.

Characters Left   1000

Appendix 5 Respondent follow-up correspondence

Andrew Shuttleworth

From: Andrew Shuttleworth
Sent: Monday, 19 September, 2006 8:32 AM
To: MBA Questionnaire Respondents
Subject: FW: Gordon Institute of Business: MBA Questionnaire: Follow-up

Dear Marketer,

You should have received a questionnaire in the last few weeks focused on service quality in the South African advertising industry. As a valued member of the marketing industry, your input would be greatly appreciated.

Please click on the link below and complete the questionnaire – it should take you no more than 10 minutes. I require all responses before 14 October 2006

http://www.peoplesurveys.com/S.aspx?ID=1762

Your assistance is appreciated,

Regards,

Andrew Shuttleworth

Cell: 083-635-4253