



**MORE IMPORTANT THAN EVER:
MEASURING TOURIST SATISFACTION**

Dr Ying Wang

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This review exercise is part of a larger visitor satisfaction project that involves the following researchers

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- Professor Susanne Becken
- Dr Ali Reza Alaei
- Dr Ying Wang
- Dr Char-lee McLennan
- Ms Jinyan (Emily) Chen

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1. Executive summary

Tourism destinations are operating in an increasingly experience oriented economy with consumers seeking more customised products and demanding superior service quality. Technologies such as social media, search engines, booking sites, travel blogs, and sharing platforms, are also dramatically changing the competitive landscape for tourism businesses. These technologies present both opportunities (e.g., enhanced connectivity, effective customer engagement, reduced cost of communication, and improved service offering) and challenges (diminishing negotiation power and loss of control of the communication process and messages) to the conventional model of business. In particular, empowered by the Internet, consumers can quickly voice their content or discontent to a global audience, enhancing or damaging a destination's/business's brand image. As such monitoring customer satisfaction has never been so critical in order to inform strategies on service quality and satisfaction management.

This report presents a review of current understanding of visitor satisfaction with tourist destinations, and how satisfaction has been measured in academic and industry practice. The review consulted academic research, industry reports, as well as Internet sources such as key tourism review and booking sites. The review starts with an overview of the importance of achieving customer satisfaction, followed by key definitions and constructs related to customer satisfaction. The review then presents commonly adopted approaches to measuring satisfaction, types of satisfaction studies, as well as how satisfaction and its related constructs are operationalised in these studies. A discussion of the recent availability of user generated content (UGC) online and its implications for satisfaction research is provided. The review concludes with a number of suggestions for destinations and businesses to consider when researching satisfaction. This review exercise is part of a City of Gold Coast funded visitor satisfaction project conducted by Associate Professor Bela Stantic, Professor Susanne Becken, Dr Ali Reza Alaei, Dr Ying Wang, Dr Char-lee McLennan, and Ms Jinyan (Emily) Chen.

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2. Why is Satisfaction More Important Than Ever?

Satisfaction has always been a central focus of business operation. It is a leading indicator of destination performance and a key point of differentiation. Tourism destinations and service providers must pay even greater attention to customer satisfaction in the modern day environment because of the fast evolving competitive landscape resultant from recent consumer and technological trends, which make customer satisfaction more important than ever (e.g., Confente, 2015; Oh, Fiore and Jeoung, 2007; Möhlmann 2015; Sharma and Baoku, 2013; Sparks and Browning, 2010).

- Tourism is transitioning from a service economy to an experience economy where tourists are more experienced, have higher expectations, demand more personalised services, and anticipate greater flexibility in the service offering.
- Search engines and booking sites bring about information and price transparency, empowering customers but diminishing businesses' negotiation power, forcing businesses to differentiate on services, not prices.
- The explosive growth of sharing platforms, such as Airbnb and Uber, challenges the conventional business model and introduces greater competition for traditional service providers. The determinants of satisfaction with shared options might differ from traditional settings, but there is very limited understanding in this regard.
- Consumers' expectations, behaviours, and decisions are increasingly shaped by electronic Word-of Mouth (eWOM) on Web 2.0 platforms, referring to Internet sites emphasising user-generated content and interactivity, e.g., social media and review sites.
- Consumers are more vocal in airing their grievances on social media and review sites. This can seriously damage a business's reputation if not dealt with properly.

These trends highlight that consumers are continuously searching for new ways of 'purchasing' and 'consuming' tourism. The competitive environment for businesses is also rapidly changing. As such, the tourism sector never stands still and constantly needs to monitor its performance in service delivery; as satisfaction can make or break a business. Social media and review sites create challenges but also allow for digital connections with customers and make it easier to interact with satisfied or dissatisfied customers. These sites also create opportunities for satisfaction research as demonstrated in studies based on UGC on review platforms and social media analyses.

2.1. What does satisfaction bring?

Ensuring visitor satisfaction is critical to the long term success of the destination and brings benefits for key stakeholders including the industry, the visitors, and local communities (for more information, see www.sustainabletourisonline.com; Foster, 1999). Customer satisfaction provides six major competitive advantages as shown in Figure 1 below. A tourism destination is also able to gain these competitive advantages through delivery quality and visitor satisfaction.

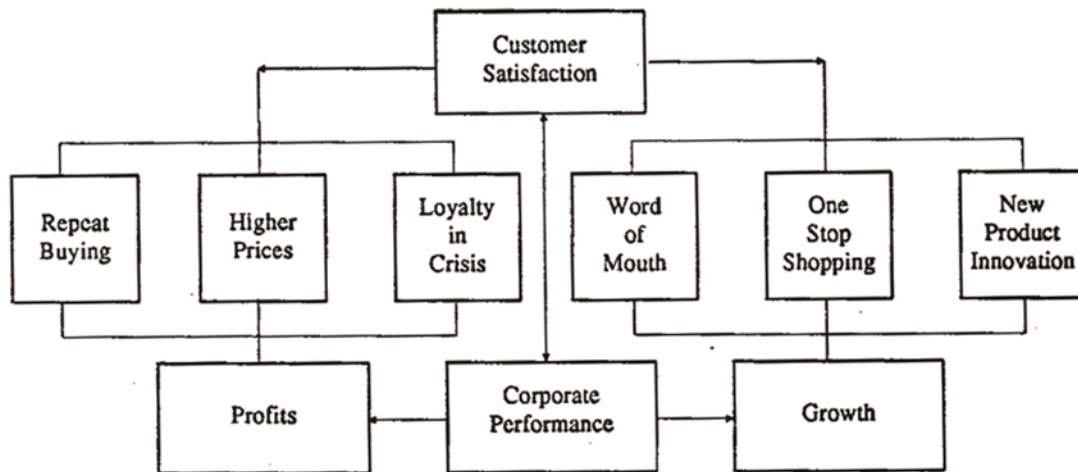


Figure 1. Six Competitive Advantages through Customer Satisfaction (Source: Sheth, 2001)

Customer satisfaction is indicative of destination performance. Decades of academic research (e.g., Chea and Luo, 2008; Gounaris, Dimitriadis and Stathakopoulos, 2010; Szymanski and Henard, 2001) offers insights into the outcomes of customer satisfaction which include:

- Word-of-mouth referral,
- Consumers' complaining behaviour,
- Brand loyalty,
- Continuance,
- Recommendation, and
- Repurchase intention / repeat visitation.

Visitor satisfaction studies with regard to tourist destinations find that a high level of satisfaction encourages tourists to re-visit the destination; satisfied tourists also tell their relatives and friends, providing free advertisement and helping promote increased travel to the destination (Kau and Lim, 2005; Kozak and Rimmington, 2000; Yu and Goulden, 2006). Satisfaction also offers financial competitiveness through a number of ways.

- Repeat purchase and positive word-of-mouth reduces business costs (Sheth, 2001).
- There is a significant and positive relationship between customer satisfaction and willingness to pay more for products and services at the individual level (Homburg, Koschate and Hoyer, 2005). Similarly, satisfaction may lead to higher expenditure during a holiday, as satisfied customers are willing to pay higher prices (Wang and Davidson, 2010).
- Satisfied customers support the destination financially and morally in times of crisis.

The results of the American Customer Satisfaction Index (ACSI), the national cross-industry measure of customer satisfaction in the United States, show that customer satisfaction is strongly related to economic performance. At the micro level, businesses achieving high levels of customer satisfaction tend to have higher financial returns compared to their competitors. At the macro level, customer satisfaction predicts both consumer spending and gross domestic product growth (<http://www.theacsi.org/about-acsi>).

On the contrary, an unsatisfactory tourism experience will generate negative word-of-mouth, cause switch to other destinations, and reduce competitiveness and growth opportunity for the destination. It is therefore critical for destinations to understand the level of satisfaction among visitors, and identify the drivers of satisfaction and causes of dissatisfaction, so as to inform strategic planning for future tourism development, destination marketing, experience designs and delivery, performance management, and human resource development.

2.2. What exactly is satisfaction?

2.2.1. Definitions

Satisfaction is defined as the consumers' overall cognitive or affective response to product use (Oliver, 1997), and consumers' judgement of whether a product/service provides a pleasurable level of consumption-related fulfilment (Chen, Huang and Petrick, 2016).

The underlying dimensions and psychological processes of satisfaction may differ as a result of the degree of complexity of the consumption experience (Oliver, 1997). A trip to a tourist destination, especially an international destination, is a complex experience. Tourists may be satisfied with some aspects and dissatisfied with other aspects of their trips. Tourist satisfaction at a destination level is therefore conceptually different from satisfaction at the transactional level because a visitor's overall experience is a sum of the numerous individual experiences that occur during the visitor's stay at the destination. These experiences may include interactions with a diverse range of natural and cultural destination attributes, and are affected by the destination's attitude toward tourists, and the tourists' perceptions of service quality and pricing (Yu and Goulden, 2006; Wang and Davidson, 2010). Satisfaction with a destination is therefore described as "cumulative satisfaction" and an "abstract construct that describes customer's total consumption experience with a product or service" (Foster, 1999; Johnson and Anderson, 1995, p. 699).

Considering customer satisfaction in isolation is insufficient. There are also levels beyond merely adequate service level and basic satisfaction. For instance, Ma, Gao, Scott and Ding (2013) raise the need to incorporate a psychological perspective in the study of customers' emotional outcomes of a tourist experience that is often characterised by pleasure and indulgence. These authors, and others such as Oliver, Rust and Varki (1997) and Crotts, Pan and Raschid (2008), differentiate satisfaction/dissatisfaction from delight/disgust; the latter is an extension of satisfaction/dissatisfaction, which refers to "a positive affect with a high level of activation or a combination of arousal and pleasure coexisting with satisfaction", and includes surprise (i.e., unexpected value, unanticipated satisfaction) as a trigger of emotional arousal (Ma et al., 2013; Oliver et al., 1997).

There is also argument for dissatisfaction to be studied as a differentiated dimension from satisfaction, as visitors can be simultaneously satisfied and dissatisfied by different sets of product attributes (Alegre and Garau, 2010; Gregory and Parsa, 2013). Kano's model of product attributes and customer satisfaction differentiates dissatisfiers from satisfiers (see the section of Approaches to Measuring Satisfaction for an explanation of this model). Another group of studies focus on addressing dissatisfaction from perspectives of service failure and complaint behaviour (e.g., Lee and Sparks, 2007; Matusitz and Breen, 2009; Ogbeide, Böser, Harrinton and Ottenbacher, 2015; Sparks and Fredline, 2007). For instance, Sparks and Fredline (2007) examine how explanations or accounts mitigate the

impact of service failure on customer satisfaction and loyalty. Before Web 2.0, dissatisfied customers typically complained directly to the service provider, but they can now voice their discontent to a global audience through various online platforms. The tourism sector is particular vulnerable to negative eWOM as travellers increasingly make bookings online (Sparks and Browning, 2010). This requires customer satisfaction research to expand into the Internet and technological space, as not doing so exposes a destination/business to risks of losing its reputation and competitive advantage.

2.3. Framework of satisfaction

Customer satisfaction has long been a focal point not only in academic research, but also in industry practice. An example of the latter is the ACSI and Figure 2 below depicts the theoretical approach taken by the ACSI. Satisfaction in this case is determined by a combination of consumer expectations, perceived value and quality, and actual experience. The constructs included in this model are accepted as key determinants of customer satisfaction in academic literature.

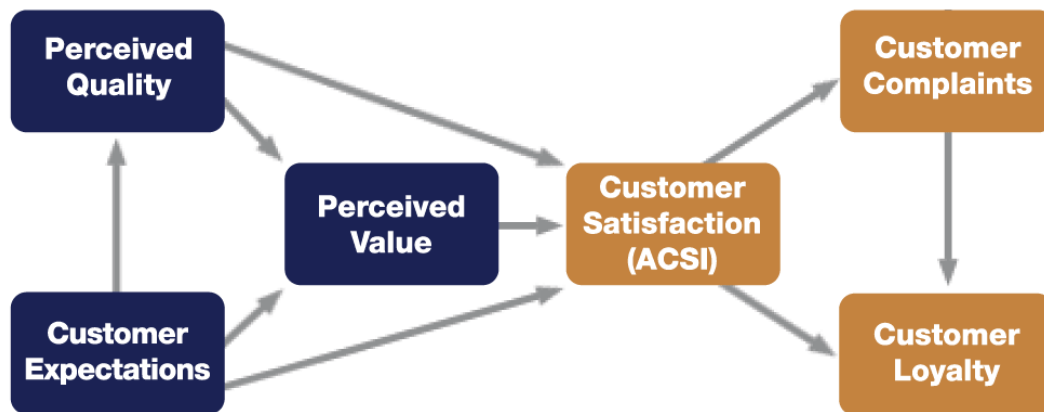


Figure 2. The ACSI Model of Customer Satisfaction (Source: www.theacsi.org)

2.4. The effect of socio-demographics and trip characteristics

Analysis at an aggregated level may lead to misleading conclusions regarding satisfaction in a particular segment of the market (Füller and Matzler, 2008). For instance, studies (Chu and Choi, 2000; Crotts and Erdmann, 2000; Füller and Matzler, 2008; Master and Prideaux, 2000; Reisinger and Turner, 1997, 1998; Turner, Reisinger and McQuilken, 2002; Yu and Goulden, 2006) suggest that satisfaction may vary across different socio-demographic and trip characteristics, such as:

- Age
- Occupation
- Lifestyle
- Country of origin and national culture
- Purpose of trip (i.e., business vs. leisure)

3. Approaches for Measuring Satisfaction

A variety of theoretical approaches to measuring consumer satisfaction have been proposed; for example, the expectancy disconfirmation theory, the importance-performance analysis, the equity theory, the attribution theory, the value-percept theory, and the dissonance theory. A common feature of these measurement approaches is their consideration of satisfaction as a relative concept measured in relation to a standard such as values, inputs, experience, etc. These standards are often inputs brought about by tourists, acknowledging the active involvement of individuals in the co-creation of their destination experience (Foster, 1999). The section below introduces several commonly adopted approaches to measuring satisfaction. There are many other approaches to understanding satisfaction, which will not be discussed here, restricted by the scope of this review. It is also worth noting that the below approaches were developed prior to the era of the Internet, Web 2.0 and 'Big Data'. Applying these approaches typically requires data collection through surveys of travellers using a predetermined questionnaire instrument.

3.1. Expectancy disconfirmation approach

The expectancy disconfirmation model is a widely used measurement model in consumer satisfaction studies with hospitality and tourism services (Wang and Davidson, 2010). Likewise in business practice, companies often ask their customers to rate whether the company's product/service has met or exceeded their expectations in researching satisfaction. Figure 3 below is the most basic disconfirmation model, including four key constructs: expectation, perceived performance, disconfirmation (i.e., the perceived gap between expectation and performance), and customer satisfaction.

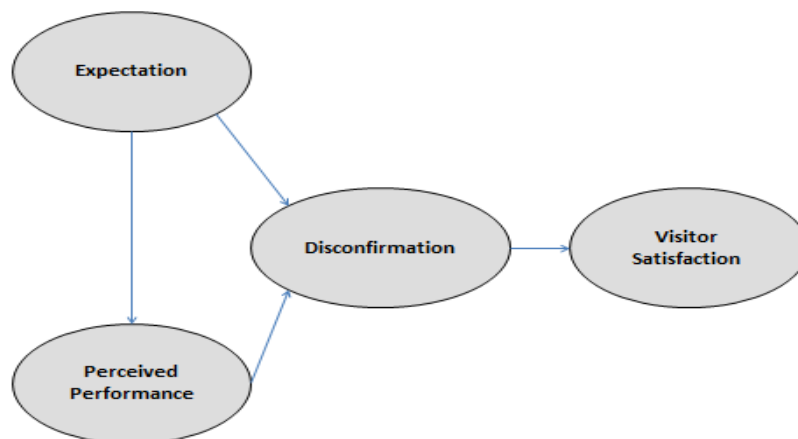


Figure 3. The Expectancy Disconfirmation Model of Customer Satisfaction

The model suggests satisfaction as a result of discrepancy between customers' pre-purchase expectations and perceived performance of product/service (Wang and Davidson, 2010).

- When a product/service outperforms the customer's original expectations, the disconfirmation is positive, leading to satisfaction.
- When a product/service underperforms original expectations, negative disconfirmation occurs and the customer is dissatisfied.

This approach offers insights into what levels of performance tourists expect to get from a destination and also allows the destination to identify areas of weaknesses and strengths. Interestingly, consumers may form their opinions about product/service performance based on various types of expectations, for instance, the ideal, expected, tolerable, and deserved (Miller, 1977, p. 76).

- The "ideal" is what a customer desires of the product;
- The "expected" is the predictive expectations and reflects what the performance should be;
- The "minimum tolerable" is the lowest acceptable performance level reflecting what the product must perform.
- The "deserved" expectation is what the customer believes a product ought to do, on the basis of the investment the customer made (e.g., price, waiting time).

Satisfaction studies commonly use a multi-item scale using a combination of expectation types to measure expectation (e.g., Wang, So and Sparks, in press). The SERVQUAL framework (to be discussed later in this section) has often been incorporated into customer satisfaction research on services using the expectancy disconfirmation model.

3.2. Performance only approach

Another group of researchers (i.e., the Scandinavian school of service quality) believe that performance alone determines consumer satisfaction, regardless of the existence of any previous expectation (Fuchs and Weiermair, 2004). Empirical evidence suggests that performance based and expectancy-disconfirmation based approaches are both adequate and valid (e.g., Carrillat, Jaramillo and Mulki, 2007). Nevertheless, with respect to informing management decision making, the disconfirmation approach offers more useful insights than its performance only counterpart (Ekinci, Riley and Chen, 2001; Tribe and Snaith, 1998).

3.3. Benchmarking approach

Extending from the performance-only approach, the benchmarking approach assesses the performance of a service provider against its competitors. The approach involves careful selection of similar organisations and direct comparisons across these organisations in various performance indicators (Fuchs and Weiermair, 2004; Zhou, Ye, Pearce and Wu, 2014). The findings are directly beneficial in terms of understanding a business or a destination's competitive position in service quality and satisfaction delivery. A limitation of this approach is its costly data collection across service providers or destinations. This, however, is less of an issue as open user generated content on service quality and satisfaction becomes increasingly available online (Zhou et al., 2014).

3.4. Importance-performance approach

The importance-performance analysis (IPA) treats satisfaction as a function of two components: 1) the importance of a product or service to a customer and 2) the performance of a business in delivering that product/service. IPA is used to evaluate satisfaction in a wide range of business sectors including tourism and hospitality services (e.g., Ritchie, Mules, and Uzabeaga, 2008). IPA recognises that travellers consider some attributes of a destination more important than other attributes. Those attributes perceived to be more important may weigh more in the overall evaluation of the service (Chu and Choi, 2000).

In applying IPA, a destination plots tourist ratings of importance and performance (satisfaction) in a quadrant model shown in Figure 4. The method allows an overall view of satisfaction within clear directives for management focus and resource allocation. For instance, destination attributes within Quadrant A are where the destination fails but these attributes are important to visitors. Destination attributes in Quadrant D display great satisfaction but they do not matter much to visitors. Immediate destination management efforts, therefore, need to concentrate on strategies to improve the design and delivery of attributes in Quadrant A (i.e., the destination’s major weaknesses). Resources need to be shifted from Quadrant D to Quadrant A to support these strategies.

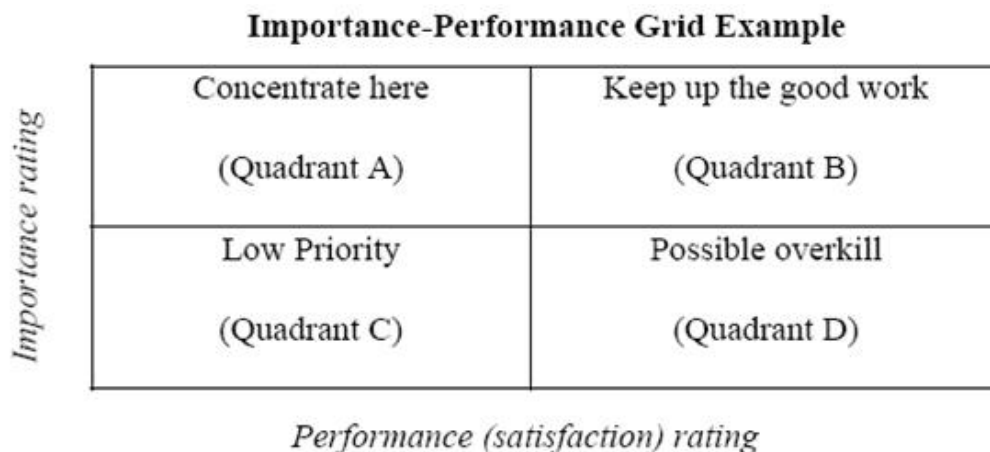


Figure 4. Importance-Performance Grid (source: Ritchie, Mules and Uzabeaga, 2008).

3.5. SERVQUAL and its extensions

Satisfaction is often assessed through evaluating service quality, which is also defined relative to expectation as “guest driven through meeting and exceeding guest expectations” (Chacko, Davidson and Green, 2005, p. 200). SERVQUAL developed by Parasuraman, Zeithaml, and Berry (1988) offers a validated measurement for evaluating service quality. Widely adopted across service sectors, SERVQUAL includes the following five dimensions, each measured by multiple items:

- **Tangibility:** the appearance of physical facilities, equipment, personnel, and communication materials;
- **Reliability:** the service provider’s ability to perform the promised service in a dependable and accurate manner;

- **Responsiveness:** the willingness of the service provider and its employees to help customers and to provide service promptly and quickly;
- **Assurance:** the knowledge and courtesy of employees as well as their ability to convey trust and confidence; and
- **Empathy:** providing caring and individualised attention to customers.

Based on SERVQUAL, tourism researchers developed scales to measure service quality or satisfaction with tourism destinations, accommodation providers, and restaurants. For instance, Tribe and Snaith (1998) propose HOLSAT to measure satisfaction with a holiday experience. Key categories of attributes in the scale are the physical resort/destination and facilities, ambiance, restaurants, bars, shops and nightlife, transfers, heritage and culture, and accommodation. Also based on SERVQUAL, Knutson, Stevens, Wullaert, Patton and Yokoyama (1990) developed LODGESRV for the lodging industry; Stevens, Knutson and Patton (1995) propose DINESERV for the restaurant sector. Similarly, Barabino, Deiana and Tilocca (2012) apply SERVQUAL to the urban public transport sector.

3.6. Kano's model of customer satisfaction

As shown in Figure 5, Kano's model of product development and customer satisfaction differentiates between different groups of factors:

- basic factors (must-have qualities such as clean toilets, and an acceptable noise level, that if not met, would generate dissatisfaction, but do not generate satisfaction if they are met),
- excitement factors (attractive qualities which generate satisfaction/delight but their absence does not generate dissatisfaction),
- performance factors (one dimensional and generate both satisfaction and dissatisfaction),
- indifferent quality (no impact on satisfaction/dissatisfaction) and reverse quality (cause dissatisfaction when present and satisfaction when absent) (Alegre and Garau, 2010; Gregory and Parsa, 2013).

This approach highlights that the commonly adopted one- dimensional treatment of satisfaction as a construct is not adequate; because dissatisfaction is likely to be caused by a set of factors different from those driving satisfaction.

4. Types of Practical Satisfaction Studies

4.1. Satisfaction management at the individual business/sector level

Within the tourism sector, a common practice at the individual business level is to integrate the measurement of customer satisfaction into a business's on-going quality assurance program. For instance, hotels commonly leave a questionnaire that varies in degree of sophistication to obtain data on satisfaction, which the hotels can then use for benchmarking and performance monitoring (Foster, 1999). An increasing number of tourism businesses have become accredited, which requires them to implement and maintain a high standard of quality, and to monitor and report on satisfaction (e.g., ecotourism certification, www.ecotourism.org.au). Other satisfaction surveys have focused on particular segments of the tourism sector, such as caravan parks, public parks, Eco-tourists, etc. (Foster, 1999). The following sections discuss satisfaction studies at a destination level.

4.2. Tourism Research Australia's (TRA) Visitor Profile and Satisfaction Program

TRA's Visitor Profile and Satisfaction (VPS) program is one of the two streams of its Destination Visitor Survey (DVS) program that commenced in 2005. In collaboration with individual destinations, the program profiles visitors to a destination, reports on their satisfaction, and benchmarks the destination against other destinations using a standardised approach in respect of research design, questionnaires, analysis and reporting. The VPS survey typically collects data through questionnaire survey of visitors which commonly includes questions on:

- what visitors expected to experience at the destination,
- whether or not the expectations were met,
- whether visitors were satisfied with the destination overall and aspects of the destinations.

This approach clearly takes into consideration the role of expectation and perception in shaping visitor satisfaction. The 2013 Gold Coast VPS Report (TRA, 2013) is one of the projects conducted under the VPS program. The report suggests an overall satisfaction with visits to the Gold Coast, particularly its beaches and quality accommodation.

TRA has also completed a number of satisfaction surveys for key source countries. For instance, its Chinese Visitor Satisfaction Project interviewed 3,606 Chinese visitors at various points of departure over a period of six months, with an aim to identify the drivers of satisfaction and causes of dissatisfaction among Chinese visitors (TRA, 2014).

4.3. The Sustainable Tourism Cooperative Research Centre (STCRC) Projects

In partnership with various state and regional tourism agencies, the STCRC conducted several visitor satisfaction surveys. For instance, the Visitor Attractions Satisfaction Benchmarking Project developed the Importance-Performance Analysis Grid for assessing visitor satisfaction. The method is underpinned by the IPA approach introduced earlier and bridges the gap between consumer expectations and experience delivery through understanding the importance of selected product / experience attributes (Ritchie et al.,

2008). The STCRC's other satisfaction projects include Canberra 2000 Visitor Satisfaction Evaluation (Cegielski, Espinoza, May, Mules and Ritchie, 2004), and the Visitor Satisfaction Survey on the Gold Coast (Sparks, 2002), among others.

4.4. Satisfaction Index

Constructing a Satisfaction Index is another practice that tends to be undertaken at a country/regional level. The Hong Kong PolyU Tourism Satisfaction Index (TSI) is a well-publicised destination level index that is grounded in a theoretical approach similar to that of the ACSI in Figure 1. The TSI model considers six tourism-related service sectors (e.g., attractions, hotels, immigration, restaurants, retail shops and transportation) and Hong Kong's seven key source markets (Song, van der Veen, Li and Chen, 2012; The Hong Kong Polytechnic University, 2015). Sectoral level TSIs are created first based on visitor ratings of key satisfaction constructs such as expectations, perceived performance, and assessed value. Sectoral TSIs are then weighted to produce the overall TSI for the city. The TSI is produced annually based on visitor survey data and the framework has been adopted by Singapore, Macau and the Guangdong province of China (<http://www.touristsatisfaction.org>).

4.5. Satisfaction with Australia and the Gold Coast

This section presents findings of satisfaction with Australia and the Gold Coast in several satisfaction studies.

4.5.1. *Australia*

Cho's (1998) exploratory study of Korean youth tourists in Australia identifies 22 relevant destination attributes. Australia outperforms expectation in only one attribute of "friendly local people" but falls short of expectations in five areas including "wildlife and ecotourism opportunities", "unique local people's life", "many historic attractions", "variety of cultural amenities", and "varied festivals/special events". The study also examines perceptual change in 33 tourist activities. In addition, the study reveals different sets of attributes that are the most influential for satisfaction, intention to recommend Australia, and re-visit intention, specifically:

- Overall satisfaction: good quality accommodation, clean and unspoiled environment, taking guided tours, and opportunity for rest and relaxation (in order of influence).
- Intention to recommend Australia: clean and unspoiled environment, good quality accommodation and many historic attractions (negative).
- Re-visit intention: unique local people's life, clean and unspoiled environment, good quality accommodation and availability of local trip information. Those negatively associated with re-visitation intention are beautiful scenery and communication difficulties due to language barriers.

Wang and Davison (2009), also considering overall satisfaction with Australia, conclude that Chinese visitors are generally satisfied with their Australian experiences, and their satisfaction is determined by how well their actual experience matches their pre-conceived expectations. At an individual destination attribute level, Australia's overall atmosphere and natural environment are highly rated by Chinese travellers. However, travellers rated their

actual experience relatively lower in relation to attributes of shopping, accessibility (e.g., visa), entertainment, nightlife, museums/art galleries and language. The study also suggests that overall satisfaction is determined by whether a travellers' experience exceeds expectation in relation to "quality and variety of goods/services" and "destination accessibility", but not in relation to the country's natural and general environments.

TRA's Chinese Visitor Satisfaction study reports an overall satisfaction among Chinese travellers, indicating that 90% of the respondents rated Australia 7 or above out of 10, and 85% rated Australia as 7 or above out of 10 in terms of likelihood of recommending Australia as a holiday destination. The majority of visitors had a trip that either exceeded (33%) or met (50%) their expectations. With regard to individual destination attributes, personal safety and security, friendliness of locals, attractions, wine experiences and food and beverage recorded the highest levels of satisfaction, whereas dissatisfaction was highest in relation to shopping and value for money. Satisfaction with attractions, value for money and shopping are generally positively associated with overall satisfaction and likelihood to recommend Australia. In other words, these are key drivers of satisfaction among Chinese visitors to Australia.

In contrast, failure to deliver in aspects of personal safety and security, friendliness of locals and food and beverage had a negative impact on visitor's trip experience. However, a satisfying experience in these areas does not necessarily produce higher overall satisfaction and greater likelihood of recommending the country, as these aspects form part of basic requirements/expectations that Chinese visitors expected to get while holidaying in Australia. This report provides empirical support for the discussion presented earlier that argues satisfaction and dissatisfaction may be driven by different sets of attributes and satisfying one's basic needs in the hierarchy of needs is critical to avoiding dissatisfaction. The report does not produce breakdowns for individual regions as no regional information was collected, but it does report the airport where the interview was conducted and those interviewed at (i.e., departing) the Gold Coast had lower satisfaction with their trip to Australia. The validity of this as a measure of satisfaction for the Gold Coast is questionable because tourists typically visit multiple destinations in Australia; consequently their responses were contaminated by experiences outside the Gold Coast.

4.5.2. Gold Coast

The VPS Report for the Gold Coast by TRA (2013) reports that more than 8 out of 10 visitors are satisfied with the Gold Coast. This overall satisfaction does not necessarily imply an overall competitiveness against other destinations in Australia because the figure is close to the benchmark (the average) of the overall Visitor Profile and Satisfaction program. There is also a high level of willingness to return to the Gold Coast (84%) and to recommend the Gold Coast to others (81%). Travellers' most satisfied attributes include the beaches, personal safety and security, friendly service, local atmosphere and quality restaurants.

The Gold Coast scores higher than the VPS program benchmark in personal safety and security, friendly service, local atmosphere, variety of things, friendliness of locals, shopping, local public transport and entertainment and nightlife. The City, however, does not perform as well in areas such as access to Wi-Fi, value for money for theme parks, roads, and car park availability.

Reisinger and Turner (2000), with a focus on Japanese tourists to the Gold Coast, suggest that Japanese travellers are dissatisfied with the lack of Japanese-speaking tour guides and Japanese signage, the high cost of domestic travel, lack of interesting culture, restricted shopping hours, the narrow range of souvenirs, and unavailability of Australian produced souvenirs. The study identifies lowest performance areas of the Gold Coast including exchange rate, historic sites/museums, cost of airfares, local prices, and to improve social standing in Japan. A more current study might produce different findings.

Considering Taiwanese all-inclusive tours to South East Queensland (SEQ), Master and Prideaux (2000) reveal that although travellers are generally satisfied with the overall trip, they are least satisfied with two attributes: opportunity to shop after 5 pm and availability of Taiwanese speaking staff, which were both considered important by travellers. In contrast, their most satisfied aspects of the SEQ region are the opportunity to bargain for goods and the availability of slippers at accommodation.

With regard to Chinese travellers' satisfaction with the Gold Coast, Li and Carr (2004) also offer the most and least satisfying attributes. At the destination level, Chinese travellers are most satisfied with the atmosphere/environment, but least satisfied with shopping and restaurants. At the individual destination attributes level, the highest satisfaction score recorded is for the beach, followed by the friendliness of local people, clean beaches, clean streets, safety during daytime and night time, as well as the weather and climate. The lowest satisfaction scores recorded are related to the duty free shopping facilities, prices in shops, souvenir quality and variety of souvenirs. Findings are consistent with previous research on Hong Kong (Mok and Armstrong, 1994) and Korean tourists (Kim and Prideaux, 1999) to Australia which also show relatively low satisfaction with the shopping component.

Reisinger and Turner (2002) look specifically into the shopping component of a traveller's visit to the Gold Coast and compare it with Hawaii. Their study identifies key shopping product categories and product attributes. The Gold Coast ranks highest on product quality and low price, then on display and packaging, followed by size and weight of products (volume). Tourists are concerned with volume because the Gold Coast is seen to be further away and is likely to be a stop of a larger itinerary in Australia. Satisfaction with shopping is determined more by shop presentation including standard of service, and value for money, rather than the attributes of products. The Gold Coast also lacks convenient opening hours, a wider range of goods, the design, display, volume, and packaging of goods. In terms of satisfaction, the Gold Coast ranks well on shop presentation and standards of service but less well on product range and value.

The body of satisfaction literature on Australia and the Gold Coast indicates a number of low performance areas across several major markets, which include shopping opportunity, quality and variety, cultural attractions, and language/communication barriers. It also shows that more recent in-depth studies are needed.

5. Operationalisation of Satisfaction and its Determinants

In practice, satisfaction with a destination or a tourism service provider is often measured at the construct level with a scale consisting of three to four items. For instance, the ACSI (www.theacsi.org) and Wang et al. (in press) use a satisfaction scale that includes three items: very dissatisfied/satisfied; falls short of expectations/exceeds expectations; and, not very close to the ideal/very close to the ideal. This is commonly combined with an attribute-based method to understand the varying impact of individual product/service attributes on overall satisfaction. In the case of a hotel, the quality of a range of hotel attributes (e.g., room facilities, service personnel, public amenities) is rated individually by respondents and modelled against the overall satisfaction rating of the hotel. Attributes are typically rated on a Likert-type scale or a semantic differential scale.

In the context of tourist destinations, destination image is said to positively influence visitor satisfaction (Wang and Davidson, 2010) as it “moulds the expectations that the individual forms before the visit” (Bigné, Sánchez and Sánchez, 2001. p. 609). Therefore, studies on satisfaction at a destination level are often operationalised through assessing visitors’ perception of destination image. For instance, Wang and Davidson (2010) compare visitors’ pre-trip perception (expectation) to post-trip perception (performance) regarding a list of destination image attributes to confirm satisfaction/dissatisfaction with Australia. Reisinger and Turner (2000) measure visitor satisfaction with the Gold Coast in terms of visitors’ perception of the Gold Coast on various destination aspects. However, Alegre and Garau (2010) point out the problems with this common practice. First, often there is an inbuilt positive bias in attribute-based satisfaction studies as the attribute lists tend to exclude possible negative features of the destination. Second, the one-dimensional scale used to measure satisfaction in many studies assumes that the same factors can generate both satisfaction (if they perform well) and dissatisfaction (if they fail to perform). However, things driving satisfaction may not necessarily cause dissatisfaction when absent.

Satisfaction studies rely primarily on questionnaire surveys for data collection, although case studies, interviews, and participant observation are sometimes used. While satisfaction surveys have many advantages, sometimes they can be limited by:

- **Lack of comprehensiveness.** A questionnaire can only include a limited number of questions. Therefore, one problem with a survey based data collection method is its inability to consider all possible factors for extraction as reliable indicators of quality and satisfaction (Li, Ye and Law, 2013).
- **Small sample size.** For instance, Wang and Davidson’s study (2009) is based on the feedback of a convenience sample of 380 respondents collected in the Brisbane International Airport. The results therefore may not be generalisable.
- **Timing of the survey providing only a snapshot.** Although TRA’s International Visitor Survey is conducted throughout the year, data collection in other satisfaction studies often covers a short period of time of several weeks. Wang and Davidson’s (2009) study collected data over three weeks during the Chinese New Year period. The 2013 Gold Coast VPS survey coincides with several events, which might have biased the sample. The timing of the survey explains the most frequently cited reason for visiting the Gold Coast being “to attend a specific event, festival or exhibition”.

- **Response bias.** Differences exist in responding to survey questions between different racial/ethnic groups, as some travellers tend to give more positive and extreme answers than others. This raises the issue of comparability of findings across different market segments (Wang, Hempton, Dugan and Komives, 2008). This has important implication for satisfaction study in some of the key markets for the Gold Coast, such as Chinese and Japanese visitors, who do not tend to express dissatisfaction in a face-to-face situation. Respondents may also exaggerate their participation and interest; their responses may be influenced by the desire to assist and be friendly towards the surveyor/interviewer in a face-to-face situation (Veal, 2006). This may result in a skewed distribution towards satisfaction. In addition, those who choose not to respond to a face-to-face survey may well be willing to comment on a service provider/destination on a review site behind a computer and visitors might be more inclined to ‘speak’ the truth when not in a face-to-face situation. As such, it is possible that face-to-face satisfaction surveys, online surveys, and studies utilising online user generated content get different samples and satisfaction distributions.

The recent availability of online UGC offers a promising solution to some of these shortcomings such as lack of comprehensiveness and small sample size, offering great opportunities for furthering satisfaction research and monitoring.

5.1. What constitutes a destination?

The complex nature of tourism experiences, combined with differences across market segments, means that how satisfaction actually manifests differs by destination. Therefore, a crucial point for consideration in satisfaction studies is what are the destination attributes that travellers identify as important to meet their needs and expectations (Li et al., 2013). This leads to the question of what attributes actually constitute ‘the Gold Coast’ as a tourist destination and what are the attributes that should be used to measure visitor satisfaction for the City. A survey of literature reveals many different ways to understand a destination and its components, some of which are listed below:

- **UNWTO’s practical guide** to tourism destination management considers a destination as being made up of six components, namely attractions (“must sees” and “must dos”), public and private amenities, accessibility, human resources, image and character, and price. The provision and quality of these elements are influential in shaping visitor experience and decisions to make the trip (UNWTO, 2007).
- **The servicescape** refers to the physical surroundings in which business is conducted, which contributes to customer satisfaction. Extending this to tourism, the physical servicescape at a tourism destination includes aspects of noise, anxiety (triggered by perceptions of danger, uncertainty, ambiguous situations) and ambience (or comfort). Two other factors of “social interaction” (e.g., crowding, interaction with other patrons and service employees) and “tourist emotions during service consumption” (e.g., excitement and happiness) also significantly contribute to tourist satisfaction with a destination (Abubakar and Mavondo, 2014).
- **The tourist satisfaction index** for Hong Kong considers six key destination components: attractions, hotels, immigration, restaurants, retail shops, and transportation (Song et al., 2012). Industry practice seems to follow the same

structure. For instance, TripAdvisor categorises service providers into hotels, holiday rentals, flights, things to do (attractions) and restaurants.

- **SERVQUAL, HOLSAT**, and several other tourism studies highlight the importance of incorporating intangible components of a destination such as the general atmosphere of the destination and weather. A broadly interpretative approach is proposed by Tribe and Snaith (1998) in the selection of destination attributes for satisfaction research. This may involve an examination of promotional material and critical literature (e.g., newspaper, guide books, television reports), as well as the collection of primary data through focus groups or interviews (Fuchs and Weiermair, 2004).

Synthesising the above approaches, a destination may be deconstructed into various components, some tangible and others intangible (see Figure 5 for an example). Each component of the destination can be further divided into subcomponents or subsectors. For instance, holiday accommodation providers can be classified as hotels, resorts, serviced apartments, hostels, motels, or as other types (e.g., IVS survey, accommodation booking sites). Figure 6 depicts such segmentation.

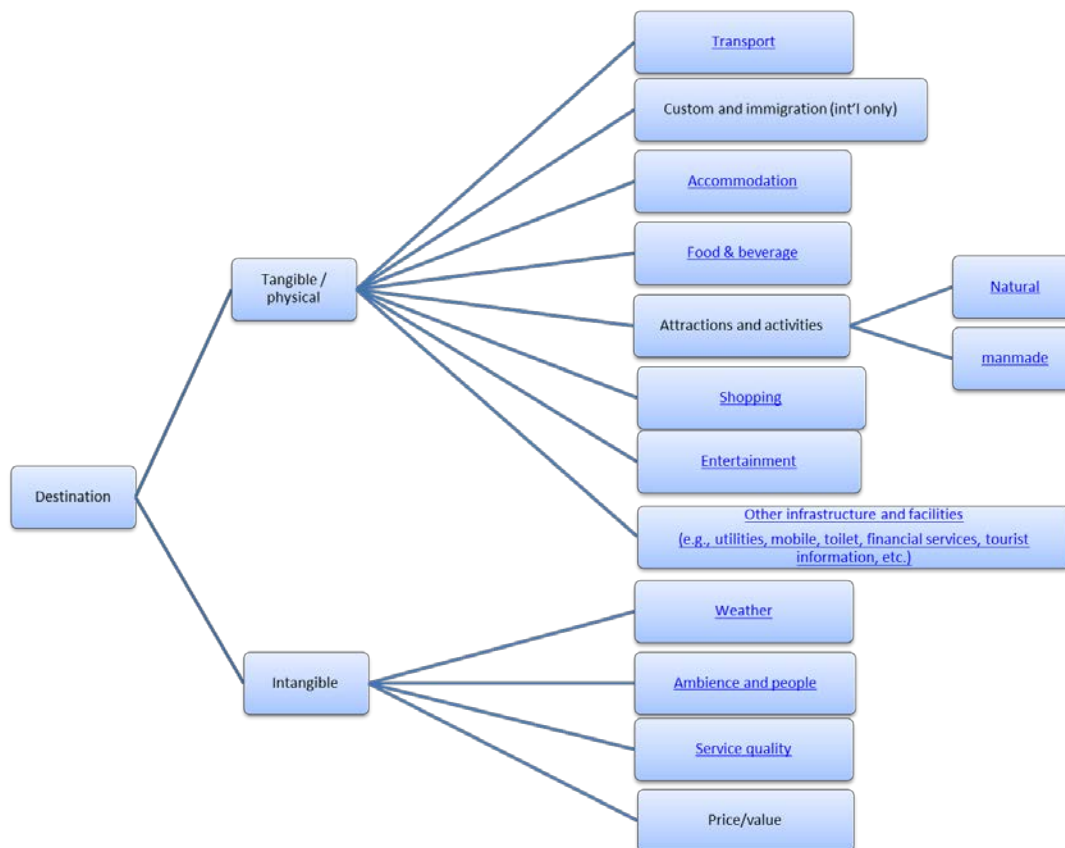


Figure 5. Destination Components

(Note: This Figure shows major categories only. Tourist activities are included in the category of attractions and are categorised into either natural or man-made type on the basis of the environment within which an activity takes place.)

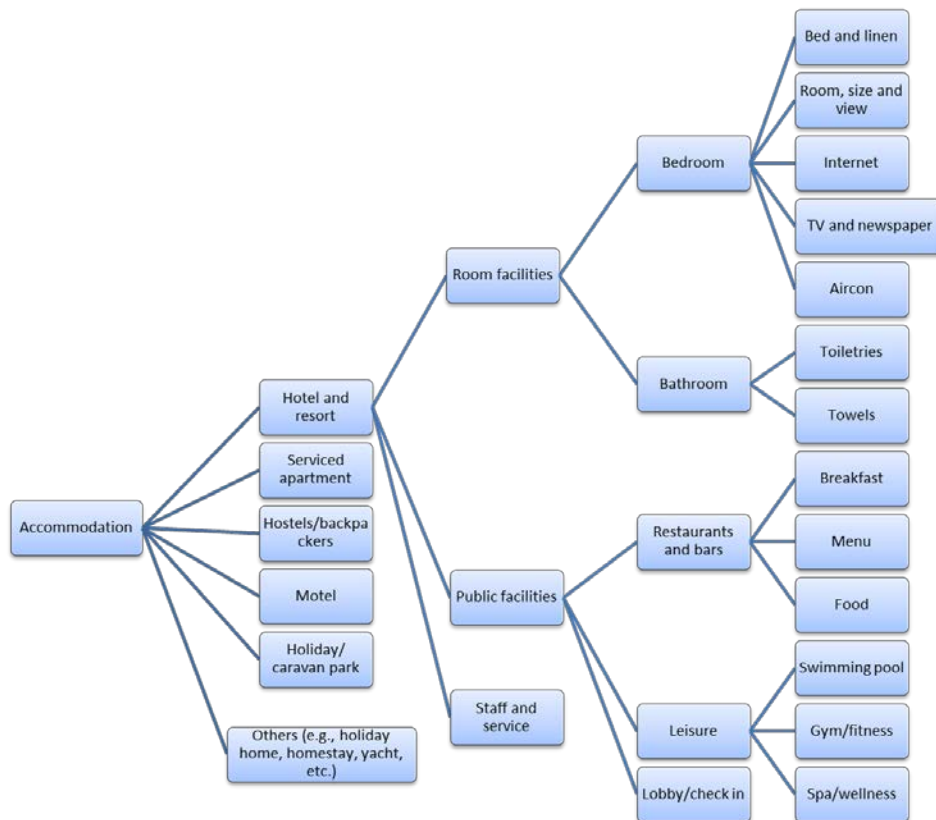


Figure 6. The Accommodation Sector

Accommodation service providers may also be segmented based on the level of service provided (e.g., luxury, mid-range, budget, etc.). Research indicates that satisfaction with accommodation properties and their key attributes of services, facilities and price, is a key driver of destination success overall (Chu and Choi, 2000). Attributes cited as important to accommodation choice include cleanliness, safety and security, value for money/price, quality, courtesy and helpfulness, convenience of location, comfortable/quality beds, rooms and towels, front desk, and free newspapers and cable TV (e.g., Chu and Choi, 2000; Wilkins, Merrilees and Herington, 2007).

Similarly, those intangible components of a tourist destination may consist of multiple dimensions themselves. For instance, de Freitas, Scott and McBoyle (2008) construct a tourist weather index incorporating the thermal (e.g., temperature and humidity), physical (e.g., wind and rain), as well as aesthetic (e.g., sunlight and clear sky) aspects. As destinations differ greatly from one another, the identification of key Gold Coast attributes consulted information relevant to the Gold Coast in academic literature, Tourism Australia's International and National Visitor Surveys, as well as popular tourist sites such as booking.com and TripAdvisor.

In the case of the Gold Coast, attractions that motivate visitors to visit include the great swimming beaches, events and festivals, availability of a variety of activities, great place for a family holiday, visiting family and relatives and the views/scenery/natural beauty. In terms of activities, visitors mostly participate in going to the beach, eating out, shopping, general sightseeing, visiting local parks, going to the markets, visiting theme parks and wildlife parks, and visiting friends and relatives. Most visited sites on the Gold Coast are Surfers Paradise

beach, Pacific Fair shopping centre, Burleigh beach, Harbour Town shopping centre and Coolangatta beach (TRA, 2013).

A destination may also be seen as being made up of its various districts and suburbs, some of which are visited by tourists, and others are not. Considering how popular tourist review / booking sites categorise tourist service providers geographically and the level of concentration of tourism activities on the Gold Coast, key geographic locations within the Gold Coast destination can be cross-referenced to destination components / attributes. In the case of beach, this cross-referencing highlights popular tourist locations such as Burleigh Heads beach, Surfers Paradise beach, Kirra beach, among others.

6. Recent Developments – The Social Media Domain

Online reviews on travel and booking sites have become increasingly popular sources of information for trip planning. TripAdvisor, the world's largest travel site hosts:

- more than 6.2 million tourism businesses and properties in some 128,000 destinations, and
- approximately 320 million reviews and opinions, and
- 53 million photos from travellers around the world (tripadvisor.com.au).

Reviews on specialist accommodation booking sites (e.g., Agoda, booking.com) are influential in shaping travellers' booking intentions, and in generating sales and a price premium for hotels (Schuckert, Liu and Law, 2015a). Many travellers see online reviews as authentic and trustworthy because of the known power of word-of-mouth, as people tend to trust peer recommendation more than advertising (Schuckert et al., 2015a, Sparks and Bradley, 2014). These sites provide not only an overall rating of the service provider, but also benchmark it with other service providers of a similar nature. In addition, the overall rating is broken down to individual aspects of the service (see Figure 7 for a TripAdvisor example).

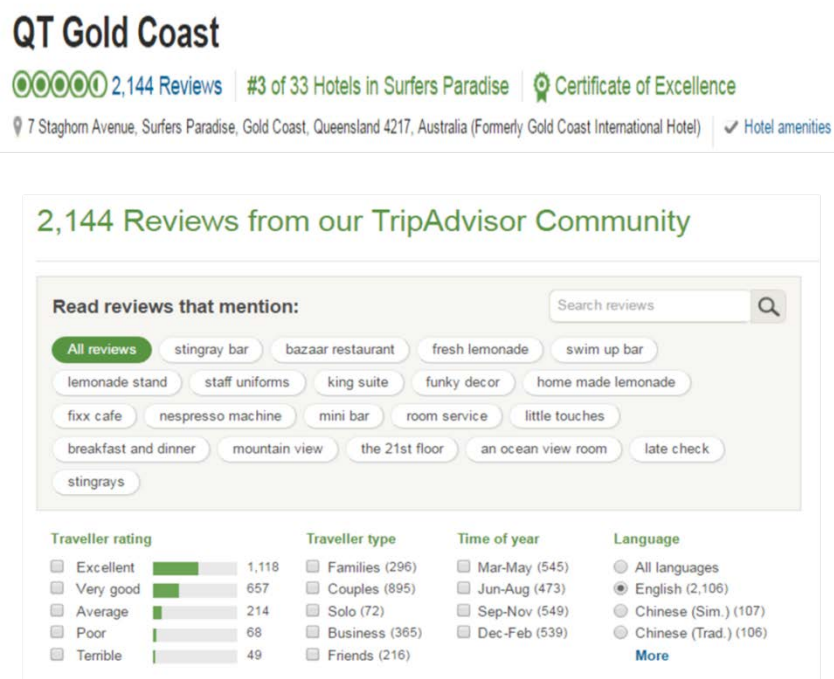


Figure 7. TripAdvisor example of online review rating system

Ratings are indicative of satisfaction with a service provider and a low rating is likely to reflect a real problem (Schuckert et al., 2015a). These sites also provide qualitative and explanatory insights into the ratings through textual comments, offering a rich array of customer opinions and sentiment for tourism satisfaction research (Li et al., 2013). Other advantages of online reviews and opinions include a bottom-up customer centred approach, free of obvious bias, low cost, up-to-date, available everywhere, access to hard-to-reach segment, and efficient (Claster, Pardo, Cooper and Tajeddini, 2013; Schuckert et al., 2015a; Zhou et al., 2014).

Most tourism studies utilise travel review and booking sites as content source, with several exceptions using other social media channels such as Twitter (e.g., Claster et al., 2013; Misopoulos, Mitic, Kapoulas and Karapiperis, 2014; Yu and Wang, 2015). Caution needs to be taken due to concerns over the trustworthiness of the data and the representativeness of those posting the reviews (Zhou et al., 2014). A recent study (Schuckert, Liu and Law, 2015b) puts suspicious rating on TripAdvisor at 20%. Suspicious ratings may be generated by either purposeful manipulation (i.e., fake reviews) or non-purposeful perfunctory rating behaviour. Studies (Racherla, Connolly and Christodoulidou, 2013; Schuckert et al., 2015b) also reveal low correlations between the overall rating and ratings on individual attributes, raising the question regarding the effectiveness of online review systems as indicators of service quality and satisfaction and the validity of using online ratings as satisfaction studies. Similarly, concerns have also been raised over Twitter users' representativeness of the global population and malicious users who post spam and fake messages (Boyd and Crawford, 2012; Gupta, Lamba, Kumaraguru and Joshi, 2013).

6.1. Types of study

Studies of UGC in tourism and hospitality generally fall into two types: one from a technical perspective and the other from a behavioural outcome point of view (Li et al., 2013, O'Mahony and Smyth, 2010). The first category includes studies that take a methodological angle to develop or evaluate analytical approaches of online content (e.g., Capriello, Mason, Davis and Crotts, 2013; Claster et al., 2013; Kasper and Vela, 2011; Lu, Kong, Quan, Liu and Xu, 2010). Studies in the second category investigate the impact of online customer review and rating on performance and behaviours such as: hotel room sales and online booking (Ye, Law and Gu, 2009; Ye, Law, Gu and Chen, 2011), management response to review (Sparks and Bradley, 2014), customer satisfaction (Li et al., 2013; Zhou et al., 2014), and customer choice (Vermeulen and Seegers, 2009).

In particular, Li et al. (2013) identify determinants of customer satisfaction with hotels through analysing online reviews on TripAdvisor's Chinese site. The study extracts 15 important attributes of hotels including: transportation convenience, convenience to tourist destination, lobby, room, bed, bathroom, air conditioning, TV, sound insulation, network, reception services, food and beverage, cleanliness and maintenance, parking, value for money. The study confirms previously identified satisfaction determinants of physical facilities, staff behaviours, quality service, cleanliness, location, value for money, internet access, and food, but adds that other factors including insulation, parking, and room service are also important to customers. The study also compares luxury hotels and budget hotels, and concludes that a subtle difference exists between customers staying in the two types of hotel.

Also focusing on the hotel sector, Zhou et al. (2014) analyse online reviews on Agoda.com to provide comparative and benchmarking insights about customer satisfaction with four and five star hotels in Hangzhou, China. Based on manual coding supplemented by qualitative insight from real travellers in a pilot test, six major attribute categories and 23 attributes are identified. The study also identifies four types of influencers of satisfaction, namely bilateral (influencing both satisfaction and dissatisfaction), satisfiers (functioning in a totally positive direction), dis-satisfiers (functioning in a totally negative direction), and neutrals (no significant association with overall satisfaction scores). The study suggests public facilities

as the only satisfier and a range of dis-satisfiers including room size, cleanliness, dated quality of facilities, noise level, room price, closeness to attraction, accessibility with public transportation, language skills, and efficiency. Dis-satisfiers tend to be associated with the core product – the hotel room itself – rather than the supporting hotel facilities such as food quality, dining environment and friendliness of staff, which the study classifies as bi-directional influencers. Similarly, a number of other studies, such as Levy, Duan and Boo (2013), O'Connor (2010), Stringam and Gerdes (2010) also reveal that words associated with satisfaction differ from those associated with low satisfaction. Zhou et al. (2014) also find that five star hotels significantly outperform four star hotels in satisfaction and there is evident variation across the key source markets of the Oceania, North America, Chinese (i.e., Hong Kong, Macau and Taiwan), Western Europe, Southeast Asia, in descending order of satisfaction, highlighting the need to go beyond simple differentiation between Asians and non-Asians in marketing practice.

Unlike most studies with satisfaction as the key emphasis, Levy et al. (2013) examine dissatisfaction exclusively by analysing one-star reviews and management responses from ten popular online review websites, from eighty-six Washington, D.C., hotels. The study finds that dissatisfaction tends to arise from areas of front desk staff, bathroom issues, room cleanliness, and guestroom noise issues.

In addition, a review of electronic word-of-mouth (eWOM) by Cantallops and Salvi (2014) suggests that existing studies are able to establish a direct relationship between satisfaction/dissatisfaction with positive/negative reviews. It also identifies satisfaction, dissatisfaction, service quality, service failure and recovery, and a sense of community belonging, as motivations for customers to post reviews online. Value and price are also found to be influential in shaping satisfaction in other studies (e.g., Hui, Law and Ye, 2009; Jeong and Jeon, 2008).

6.2. Sentiment analysis

Online reviews may be analysed entirely manually by the research team, automatically using computer programs, or using a combination of both (e.g., Li et al., 2013). Sentiment analysis, or opinion mining, is regarded as an efficient method of analysing online content especially in social media sites (e.g., review and blog sites, tweet feeds, etc.); it is a valuable tool for customer experience and satisfaction analysis (Kang and Park, 2014; Kho, 2010). Sentiment analysis is an analytical approach of converting subjective and unconstructed online data into constructed data to extract information that reveals critical events, patterns and trends, determining the emotional tone behind textual data in order to gain an understanding of attitudes and opinions to inform strategic decision making in aspects such as quality control, performance evaluation, and experience design (Misopoulos et al., 2014). In other words, this method is able to capture customers' opinions, sentiments and emotions, which reflect their overall cognitive or affective response to product use. This method has recently gained traction into tourism and hospitality fields as a way to explore travellers' experience and satisfaction with airlines (Misopoulos et al., 2014), hotels (Duan, Cao, Yu and Levy, 2013) and sport events (Yu and Wang, 2015). Sentiment analysis of social media data can provide further insights beyond what the literature has previously identified (Misopoulos et al., 2014).

A data driven approach is often taken in sentiment analysis of big data and social media content. This approach lets the data speak for itself and differs substantially from a top down

approach to the data that dominates tourism literature. In the traditional approach, the *a priori* specified theoretical relationships between key satisfaction-related constructs are empirically validated. Satisfaction with a service provider/destination can be studied in terms of both tangible and intangible attributes based on theoretically validated scales. A data-driven approach, in contrast, takes whatever is available in the data and lets key aspects emerge naturally in the analytical process. That is, data-driven detection of keywords used by visitors identifies those elements that are relevant and that are commented on in the language used by visitors. A meaningful analysis of big data should be one that is informed by tourism literature, amalgamating the data-driven approach with the theory-driven approach.

The question is raised as to whether sentiment analysis of big data is an adequate tool to measure satisfaction. Some studies (e.g., Bricker, 2011) posit that sentiment and satisfaction should correlate with one another at an aggregated level (e.g., for a sector, a brand, a company). Bricker's (2011) comparison of sentiment scores to the established ACSI returns a moderate to strong correlation at 0.77. However, Duan et al. (2013) reveal a weak correlation between the sentiment scores of individual comments and the scores evaluating the overall service delivered. This is because individual comments made by customers tend to focus on very specific aspects of produce use whereas their satisfaction overall reflects their evaluation of the total experience taking into account both positive and negative aspects of the experience. Compared to early studies focusing on the overall sentiment entity, recent studies perform more in-depth aspect-based sentiment analysis that is able to reveal the sentiment towards various aspects of an entity, such as the vocals, lyric, recording quality of a movie, or the location, room, food and beverage of a hotel (Thet, Na and Khoo, 2010), allowing for better capturing of satisfaction.

7. Conclusions

Understanding satisfaction is important as satisfaction contributes to business opportunities, better financial performance, and greater competitiveness. This understanding is even more critical in a fast evolving competitive landscape afforded by technological advancement as well as the changing consumer behaviours and disruptive innovations that come with it.

Satisfaction is a consumer's cognitive and emotional evaluation of a consumption experience; it is a concept relative to a comparison standard that imposed by the customers (e.g., expectation, values and perceived importance). The abstract nature of customer satisfaction and the complex, multiple, and dynamic nature of destination image, brings about the difficulty and diversity in its measurement for tourism destinations. A range of approaches to measuring satisfaction is at the disposal of destination managers and business owners. Survey based data collection approaches have dominated, but more recently studies have begun to utilise user generated content on social media and travel sites to research satisfaction. The jury is still out on which approach gives more valid and representative results.

Conducting customer satisfaction research costs time and resources to both a destination/service provider and its customers. A thoughtfully designed method ensures the success of satisfaction research and collects the most relevant information. Destinations or businesses that want to research customer satisfaction need to consider a few things:

- What type of satisfaction do you want to measure? If overall satisfaction is the target, key satisfaction constructs outlined in this review can form the basis of overall satisfaction metrics for monitoring customer satisfaction. For instance, metrics may include measures of overall satisfaction, intention/likelihood to recommend to others, experience relative to expectation/ideal experience, and re-visit/purchase intention. If you want to identify causes of satisfaction, measuring merely overall satisfaction is not adequate. Effort needs to be made to identify the aspects most relevant to the destination/product/service. The aspects should include both the physical and intangible (service) components of your destination/business.
- What is the objective of measuring satisfaction? And what measurement approach should be taken? The choice of measurement approach is dependent upon the objective of measuring satisfaction and the level of insights a destination wants to obtain. For instance, if a destination wants to identify areas of poor performance, expectation-disconfirmation approach, and performance only approach may be sufficient. However, these approaches do not reveal whether an improvement in the identified areas would actually matter to visitors. The importance-performance approach can provide such insights. If the objective is to determine how well the destination performs against its competitors, a benchmarking approach might be best.
- Measuring satisfaction regularly. Timing of satisfaction surveys may introduce bias into the sample; therefore, conducting regular satisfaction surveys would offer a destination/business more comprehensive and balanced insights. Regularly conducting surveys also allows you to track performance over time and to evaluate the effectiveness of any quality improvement effort you may have put in place. The destination/business should compare customer satisfaction and bottom line results.

- Data collection method. Satisfaction surveys and online review sites can both be used for collecting data for satisfaction analysis. However, each method has its advantages and disadvantages. A destination/business may decide to rely on one method, but should consider supplementing/verifying the results by the other method.
- Understanding dissatisfaction. Satisfaction and dissatisfaction are often driven by different things. For example, dissatisfaction may be the result of a critical event, while satisfaction may be related to the entire experience. Therefore, a survey needs to accommodate questions that can elicit what it is that makes customers dissatisfied and why they are dissatisfied with these aspects.
- Differences across markets. Differences exist between different visitor markets (e.g., international vs. domestic visitors, markets of different cultural and socio-demographic background), in visitor expectations, motivation, benefits sought, and satisfaction. Therefore, satisfaction analysis for individual market segments is necessary.
- Predictive analysis. To evaluate the effect of satisfaction, a destination should analyse the link between customer satisfaction and other business performance indicators such as sales volume and the number of repeat visitors.

In short, a destination/business needs to design an appropriate method for monitoring customer satisfaction on an on-going basis. This method needs to be cost-effective, preferably real time, and can be used to inform strategic planning and management.

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