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Article

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Global Business & Finance Review (GBFR)

Provided in Cooperation with:

People & Global Business Association (P&GBA), Seoul

Suggested Citation: Štumpf, Petr; Vojtko, Viktor; Valtrová, Barbora (2018) : Satisfaction of European tourists: Benchmarking of EU countries, Global Business & Finance Review (GBFR), ISSN 2384-1648, People & Global Business Association (P&GBA), Seoul, Vol. 23, Iss. 1, pp. 1-14, <https://doi.org/10.17549/gbfr.2018.23.1.1>

This Version is available at:

<https://hdl.handle.net/10419/224390>

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Satisfaction of European Tourists – Benchmarking of EU Countries

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ABSTRACT

High level of satisfaction of tourists is one of the most common goals of sustainable tourism destinations. The general assumption is that higher level of tourists' satisfaction leads to a higher tourists' loyalty to destinations. This research looks on this relationship from macro level of European Union (EU) countries. We have used data from Eurobarometer – Preferences of Europeans towards Tourism between 2013 and 2016 – to statistically compare and analyse several satisfaction indicators of European tourists incoming the chosen EU countries. The results show significant differences amongst countries as destinations and could be used to identify strengths and weaknesses of EU countries as tourism destinations. The robust data set enables the benchmarking of EU countries as tourism destinations from the tourists' satisfaction point of view. This study shows the ranking of the EU countries in several dimensions of tourists' satisfaction.

Keywords: Tourism, Satisfaction, Eurobarometer, EU countries, Benchmarking

1. Introduction

Sustainability and competitiveness of tourism destinations are some of the most discussed topic of researchers and practitioners in the field of tourism. One of the existing and widely used multi criterial tool for measuring competitiveness of the countries on the tourism market is the Travel & Tourism Competitiveness Index (TTCI), which is considered as a good indicator of overall country situation in

relation to tourism. But the competitiveness and the success of the tourism destinations is also connected very closely to tourists' satisfaction and loyalty to destinations. Nevertheless, as far as we know, no internationally reliable tool for cross-country comparison with the same international methodological framework exists in the field of tourists' satisfaction.

The aim of the study is to examine, how satisfied are tourists with their main holidays spent in European Union countries. The specific aims are defined as follows:

- to identify what are the strengths and weaknesses related to tourist satisfaction with holidays in various European countries,
- to benchmark the EU countries as tourism destinations from a perspective of several satisfaction factors, such as tourists' satisfaction

Received: Dec. 11, 2017; Revised: Feb. 3, 2018; Accepted: Mar. 8, 2018

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with the quality of accommodation, safety of accommodation, natural features, general level of prices, how tourists are welcomed, activities/services available and accessible facilities for people with special needs,

- to correlate the results essentially with Travel & Tourism Competitiveness Index and its chosen relevant index components.
- This study shows the benchmarking of the EU countries as the tourism destinations from the tourists' satisfaction point of view using huge open data set from Eurobarometers 2013 to 2016 about preferences of Europeans towards tourism. This enables not only to rank the EU countries in several dimensions of tourists' satisfaction, but also to point out the changes in tourists' satisfaction in EU countries in the past few years.

The raw Eurobarometer data enable analysis from the destination point of view which complement previous studies by the European Commission presented from the viewpoint of residents of EU countries. In this sense these results are unique and have not been presented in this form before and so we consider these findings useful not only for researchers but also for practitioners in tourism.

II. Literature Review

Planning of tourism development represents one part of the regional policies of all member countries of the European Union. Strategic plans at national or regional level are specific tools that ensure a sustainable development of tourism in tourism destinations (Luštický, Kincl, & Musil, 2011).

The main goal of tourism destination strategies and the result of efficient tourism destination management is, or at least should be, a competitive and sustainable tourism destination on one hand and satisfied visitors on the other hand. To achieve sustainable competitive advantage of tourism destinations, it is necessary to ensure the involvement

of all stakeholders in the strategic process (Luštický, Gunina, & Oberhel, 2017), i.e. to involve also the visitors opinion to the destination strategies. But how to find out, that the destination is more or less competitiveness on the tourism market? Benchmarking of tourism destinations represents one of the options.

A. Management of sustainable destination and destination competitiveness

Tourism destination management, by Laesser & Beritelli (2013) in Sankt-Gallen consensus, is essentially defined as management processes that aim to attract visitors and allocate time and money in a specific geographic space. Generally, the aim of a destination management and the destination strategies, used for tourism destination development, is to build and maintain its competitiveness in the tourism market.

The link between destination management as a complex process, sustainability and competitiveness is analysed in many recent studies (Gomezelj & Mihalič, 2008; Mazanec, Wober, & Zins, 2007; Ritchie, 2003; Ryglova, Vajcnerova, Sacha, & Stojarova, 2015). The basic approach works with the general assumption, that two basic parameters – competitiveness and sustainability – must be fulfilled to be successful on the tourism market. In other words – competitiveness without sustainability is illusory (Ritchie, 2003).

Individually, these parameters are not sufficient, but together they complement each other and form a basic presumption of success. Following Mazanec et al. (2007), the success, in tourism destination management, is frequently measured using a variety of indicators including not only number of visitors and expenditures, effects of seasonality, efficient use of existing capacities or preserving of natural and cultural resources, but also the visitors' satisfaction with provided tourism products or efficient marketing communication.

To be more competitive on the tourism market, a destination should carefully plan and choose an integrated model that reflects the value chain for its' customers, i.e. it is important to integrate the

quality as a competitiveness factor of destinations (Formica & Kothari, 2007; Ryglova et al., 2015). Several studies show such models of competitiveness of particular countries or regions (Andrades & Dimanche, 2017; Campón-Cerro, Hernández-Mogollón, & Alves, 2017; Gomezelj & Mihalič, 2008; Mira, Moura, & Breda, 2016) but all of them are based on different methodologies and factors measured are not to be simply comparable.

One of the multi criteria tools for measuring competitiveness of the countries on the tourism market is the already mentioned Travel & Tourism Competitiveness Index (TTCI). In this index, satisfaction of visitors is not included directly but there are two important factors of index component *Human Resources and Labour Market*, which could be closely linked to the visitors' satisfaction, especially from provided services perspective - *Extent of staff training* and *Degree of customer orientation* (World Economic Forum, 2017). However, these factors are not sufficient for expressing satisfaction and thus it is opening up a discussion about the TTCI index composition and interpretation.

B. Tourism destination benchmarking

The destination benchmarking is considered as a conceptual approach of evaluating, measuring and comparing destination competitiveness, sustainability or performance. There are several approaches that can be used for the tourism destinations benchmarking, such as ongoing process benchmarking, benchmarking against the best, performance improvement benchmarking and gaining new information (Kozak, 2004b, 2004a; Kozak, 2002; Kozak & Rimmington, 1999).

In this context, Cernat & Gourdon (2012) for example provided Sustainable Tourism Benchmarking Tool (STBT) based on a number of benchmarks against which the sustainability of tourism activities in various countries or destinations can be assessed.

There are also various factors of visitors' satisfaction, that can be benchmarked from the tourism destination point of view. It is possible to measure the satisfaction

with accommodation services, facilities and activities, local transport services, hospitality and customer care, destination airport facilities and services, hygiene, sanitation and cleanliness, price or language communication (Kozak, 2002).

For such benchmarking, both qualitative or quantitative methods can be used, but it is extremely complicated to gather the data for benchmarking on national or higher level. That is why the recent studies are more aimed at the benchmarking only on the level of very few countries (Assaf, 2012) or regions (Blancas, Oyola, González, & Caballero, 2017; Khazai, Mahdavian, & Platt, 2017; Kozak, 2002). As far as we know, there are no research studies showing the benchmarking of more or all EU countries from visitors' satisfaction point of view based on quantitative research methods.

C. Visitors' satisfaction

Satisfied customers are not only valuable customers who would use the service again, but are positively disposed towards it and may even recommend it to others. High overall satisfaction leads to spreading of positive information, recommendations and increased loyalty.

Understanding customers is one of key success factors when providing services. This is the reason why researchers, providers and local governments are interested in tourists' behaviour, attitudes, motivation for travelling and satisfaction.

Vildová, Martinčík, Tluchoř & Jakubíková (2015), for instance, recognize satisfaction on three levels. The first level may be considered as a simple satisfaction. The second level represents the willingness to recommend the product or service to others (fidelity). The highest and most valuable level is the loyalty when the customer willingly recommends products or services to the others and returns back to purchase the product again.

This satisfaction of visitors also represents a crucial factor of destination sustainability and competitiveness (Iniesta-Bonillo, Sánchez-Fernández, & Jiménez-Castillo,

2016; Jarvis, Stoeckl, & Liu, 2016; Sukiman, Omar, Muhibudin, Yussof, & Mohamed, 2013), destination loyalty (S.-C. Chen, 2015; Cong, 2016; Matzler, Füller, & Faullant, 2007; Romão, Neuts, Nijkamp, & Shikida, 2014; Vildová et al., 2015), destination image (Loi, So, Lo, & Fong, 2017; Veasna, Wu, & Huang, 2013; Wu & Kim, 2017) and generally of an overall success of tourism destinations. From environmental aspect of sustainability, it is important to provide full information about the green practices in order to raise public awareness towards environmental issues (Mazhenova, Choi, & Chung, 2016). This fact may also affect the overall tourists' satisfaction.

Matzler et al. (2007), for example, surveyed satisfaction in Alpine ski resort with various aspects of the ski resort, such as accommodation, slopes, fun offers, children's offer, nightlife, ambience of the ski resort, various aspects of the infrastructure, price-quality perceptions, services, etc. According to their results, they were able to give an advice to managers how to discover the structure and segments of their customers and understand how the satisfaction is being formed.

Bambauer-Sachse & Rabeson (2015) concentrated their research on ways how to increase the satisfaction with services by different types of compensations. Some others focused on how to use smart technologies to increase it (Tan, 2017; Yoo, Goo, Huang, Nam, & Woo, 2017) and several studies analysed the relationship between satisfaction in life and visitors' satisfaction in tourism destinations (Y. Chen & Li, 2018; Woo, Kim, & Uysal, 2015).

The satisfaction with tourism product is also considered as one of the essential objectives and indicators of success in tourism destination management (Mazanec et al., 2007; Štumpf and Vojtko, 2016) but measurement of tourists' satisfaction in tourism destinations is more complicated than in the case of individual tourism services. Visitors thus usually evaluate partial factors of satisfaction (e.g. quality of accommodation, catering services, transport accessibility, uniqueness of a destination etc.) in average worse than the overall satisfaction with the stay in a destination as a whole (Vajčnerová, Žiaran,

Ryglová, & Andráško, 2014).

There are many different methods that have been used in the research of visitor satisfaction and data analyses for this purposes. Above basic statistics it is possible to mention for example structural equation modelling (del Río, Agüera, Cuadra, & Morales, 2017; Romão et al., 2014), path analysis (Matzler et al., 2007), formative modelling (Cong, 2016) or common statistical method, such as paired/independent-samples t-test, one-way analysis of variance (ANOVA), regression and correlation (Agyeiwaah, Adongo, Dimache, & Wondirad, 2016; Parola, Satta, Penco, & Persico, 2014), Item-Objective Congruency (IOC) index (Choovanichchannon, 2015), exploratory factor analyses (EFAs), principal components analyses with Varimax rotation and MANOVA (Jensen, Li, & Uysal, 2017) or hybrid text mining methodology using artificial intelligence (Kim, Park, Yun, & Yun, 2017).

The abovementioned research studies are typically limited in data collection only to specific tourism destinations or groups of tourists which limits use of these studies for comparison. But on the level of European Union and member countries, such a direct comparison is possible through Flash Eurobarometer series focused on preferences of Europeans towards tourism (European Commission, 2014a, 2014b 2015, 2016).

These reports show the preferences in travelling of Europeans from EU as a source market and cover a range of aspects regarding holidays of Europeans. In particular: 1) respondents' reasons for going on holiday, 2) information sources and tools used to research and organise holidays, 3) respondents' travel profiles, preferred destinations and holiday types, 4) satisfaction with various aspects of holidays, 5) plans for holidays in current year, including the potential impact of the current economic situation on these plans.

However, these results show only the differences between European countries as source markets, i.e. what are the reasons for travelling in particular countries, which destinations are preferred for holidays by residents of particular countries or how satisfied were the residents of particular countries

on their holidays.

Further comparison from the tourism destination markets point of view is missing even though the data are available and we thus, from this perspective, see a gap in the present knowledge about tourism satisfaction as well as way forward.

III. Methods

The main research questions of this exploratory study are to find out *how are European Union tourists satisfied with their main holidays spent in European Union countries* and *identify what are the strengths and weaknesses related to tourist satisfaction with holidays in various European countries*.

To answer these research question, secondary data from Eurobarometers 2013 to 2016 about preferences of Europeans towards tourism have been used. These open datasets (European Commission, 2014a, 2014b, 2015, 2016) combine respective Eurobarometer telephone survey responses from all EU member countries. Each country is in the dataset represented by roughly 500, 1000 or 1500 respondents depending on its' size and each dataset thus contains more than 30 000 responses.

These datasets are very unique because of their size, scope and standardized survey questions used across different EU countries, languages and several years. As was mentioned above, their main purpose was to compare perception and behaviour of EU inhabitants from different source countries but they also provide an opportunity for further analysis based on holiday destination country, especially with regards to tourist satisfaction.

The satisfaction was quantified by the following question (excerpt from the 2016 survey) - "Thinking about your main holiday in 2015, how satisfied were you with...?":

- The quality of the accommodation
- The safety of the accommodation
- The natural features (landscape, weather conditions,

etc.)

- The general level of prices
- How tourists are welcomed (e.g. services for children, customer care, "pets-welcomed" policy, etc.)
- The activities/services available (transport, restaurants, leisure activities, etc)
- Accessible facilities for people with special needs (e.g. disabled or elderly people, children with prams)"

Each of these six options used the following scale for possible answers - "very satisfied" (1), "fairly satisfied" (2), "not very satisfied" (3), "not at all satisfied" (4) and "don't know/not available" (missing value).

After obtaining these datasets, the first step was to check how homogenous the data are, i.e. whether there are any significant differences between respondents from various origin countries and their satisfaction in a given destination country. We have tested that by a series of linear models (one linear model per each year, satisfaction index and destination country variables) and found very low adjusted R^2 for all examined combinations of satisfaction indices, origin and destination countries. Generally, these adjusted R^2 s were systematically lower than 0.1 with very few exceptions typically related to very small existing number of responses for a given destination country (for example Luxembourg) and not influencing the overall high homogeneity, i.e. we can state that there are no significant differences in satisfaction evaluation based on the respondents' country of origin.

Because the satisfaction evaluation by tourists from various countries has been found very homogenous, it is possible to assume that the datasets are broadly representative with regards to satisfaction evaluation not only from the perspective of origin countries but also from the perspective of destination countries as well.

The next step was then to calculate mean values, standard deviations and 95% confidence intervals of all satisfaction indices for each year and destination country (due to the dataset limitations only EU member countries have been chosen). The mean

values, standard deviations as well as 95% confidence intervals reflecting sample sizes were then used for comparison and benchmarking. Differences were statistically tested by independent sample t-tests.

As the last step, Pearson correlation coefficients between satisfaction from Eurobarometer and selected Travel & Tourism Competitiveness Index (TTCI) components were calculated. The TTCI components were selected as follows:

- Extent of staff training
- Degree of customer orientation
- Female participation in the labour force
- Health and hygiene
- Human resources and labour market
- Hotel price index US\$
- Natural resources
- Number of World Heritage natural sites
- Number of World Heritage cultural sites
- Price competitiveness
- Quality of tourism infrastructure

All the calculations and charts have been made using R statistical package (R Core Team, 2016) and MS Excel.

IV. Results

Due to the very extended dataset for four years and paper limitation, only dataset from 2016, i.e. covering satisfaction with 2015 holidays has been chosen, although some comparisons have been done also with previous years to identify significant changes.

The 2016 dataset has a minimum of 9 responses per country (Luxembourg), maximum is 1916 responses per country (Spain) and on average 512.5 responses per country.

Due to the differences in sample sizes for involved countries it is necessary to take into consideration some limitations – especially Luxembourg data are definitely not sufficient and Malta results should be taken with care as well. For these reasons, 95% confidence intervals are being used in all the following figures to see the range in which the mean value could be estimated for all EU visitors.

At first, satisfaction with quality of accommodation in the EU countries can be compared. As can be seen on Figure 1, the best performing countries are Austria, Ireland and Denmark (the lower the index, the better). On the fourth place is Luxembourg but

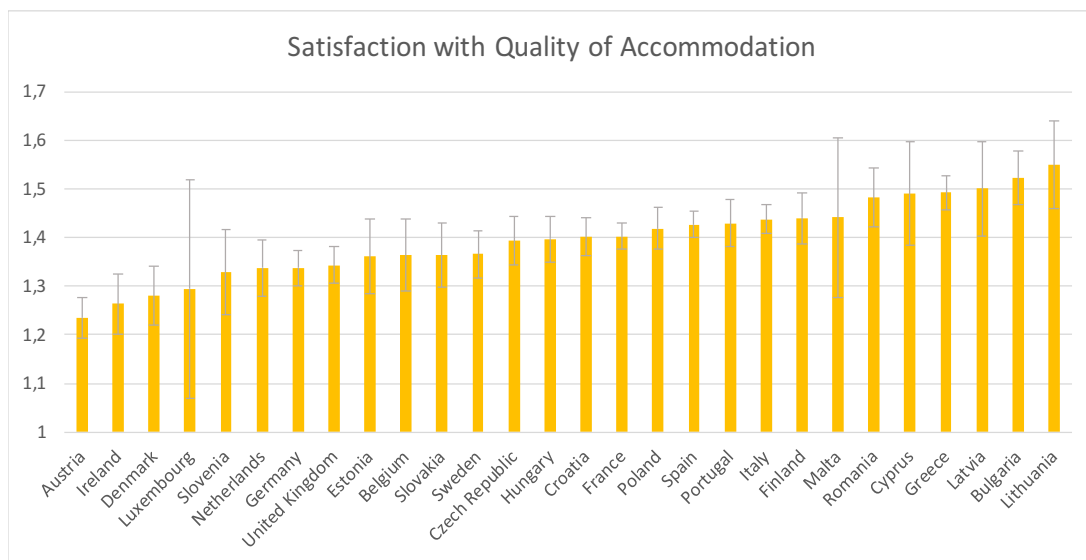


Figure 1. Satisfaction with Quality of Accommodation in EU Countries Including 95% Confidence Intervals



Figure 2. Satisfaction with Safety of Accommodation in EU Countries Including 95% Confidence Intervals

as can be seen on the confidence interval, there are not enough responses to rely on the mean value.

The worst performing countries are close to the mean value of 1.6 which is still showing quite satisfied tourists and should not massively discourage them. Values above 2 would represent more dissatisfied than satisfied tourists which is not happening here.

A slightly different picture arises when we compare the accommodation safety (see Figure 2). Here is the overall performance slightly better and the order is partially different. Some countries like Austria and Denmark are again amongst the best performers but other countries, especially those that have been hit by migration crisis, are worse off.

When we compare the satisfaction with natural features on Figure 3, the overall pattern visible on previous figures changes significantly. Croatia improves its' position as well as Slovakia, Czech Republic and France. Northern European countries perform generally worse which is probably mainly due to weather changes. This would also be supported by quite big and statistically significant differences between mean values of this satisfaction when several years are compared (especially in Denmark, Sweden and Lithuania), i.e. there is quite high variation of

this particular satisfaction measure over years.

A very interesting comparison is being provided for price level satisfaction in Figure 4. Not only that the overall results are generally higher and showing more of dissatisfaction than in previous charts but it is also possible to recognize that this satisfaction is more about value for money than purely the price level.

This is even more interesting when taking into consideration that there are quite big differences in price levels and despite higher prices visitors tend to be more satisfied in countries where also other satisfaction aspects are better. We may speculate that this can be related to the factors like natural features, activities and quality of services being provided in these countries but it would require further analysis.

The best performers are in this respect Estonia with big improvements between 2012 and 2015, Denmark, Ireland, Austria and Hungary. The worst performers are Lithuania, Romania and Bulgaria - which may be surprising given the fact that the general level of prices in these countries is generally lower than in the best performing countries.

As in relation to the natural features, also with regards to prices there is much higher volatility in

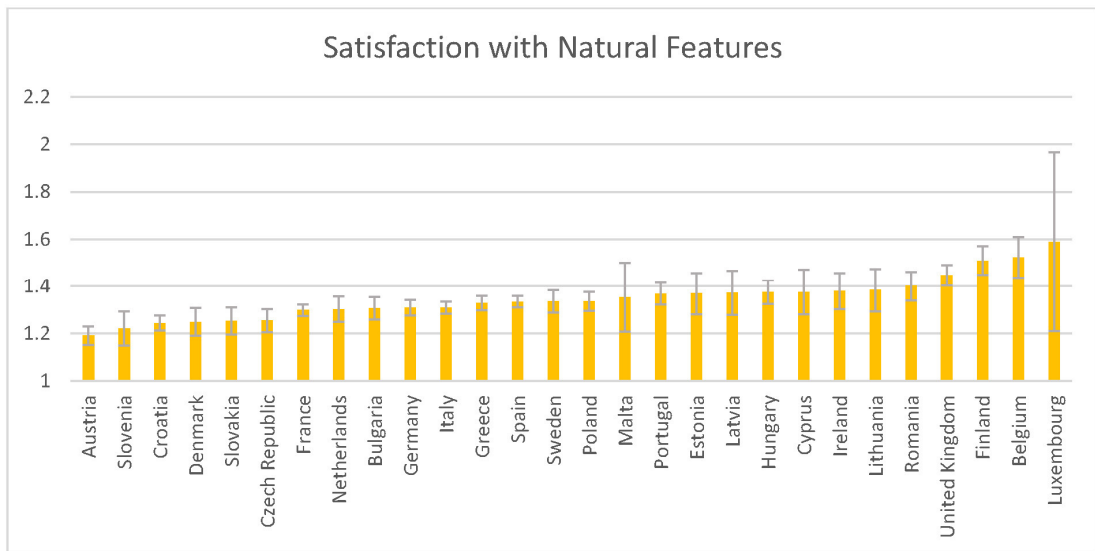


Figure 3. Satisfaction with Natural Features in EU Countries Including 95% Confidence Intervals

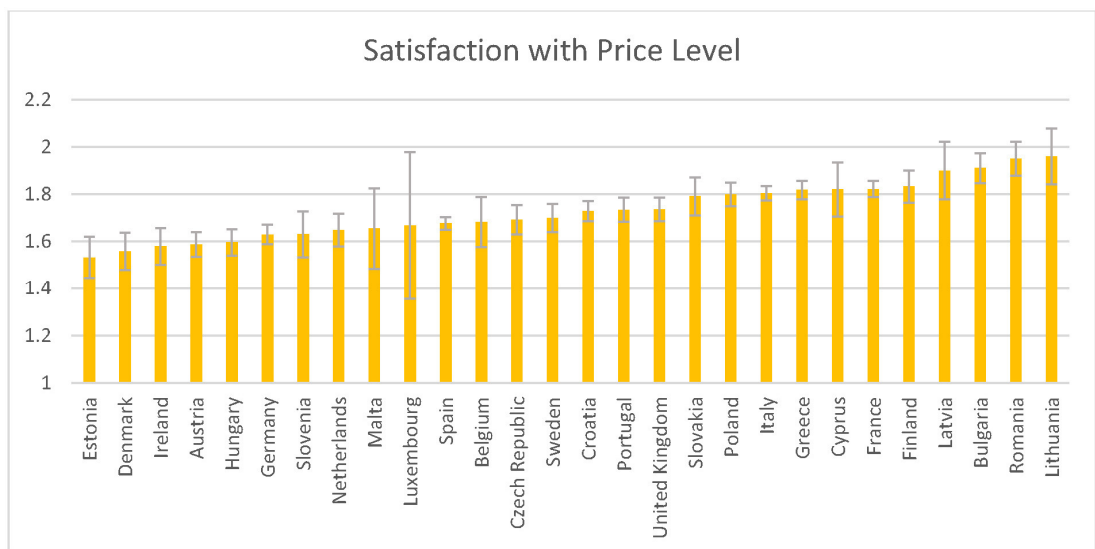


Figure 4. Satisfaction with Price Level in EU Countries Including 95% Confidence Intervals

satisfaction between years probably due to variation in prices and exchange rates. Again, such a relationship should be explored more thoroughly in the future.

In Figure 5, the satisfaction with activities and services is being shown. The overall situation is very similar to the satisfaction with quality of accommodation although the satisfaction with activities and services

is generally worse.

The best performers in this category are again Austria, Denmark, Ireland and the UK. The worst performers are Romania and Bulgaria.

A very interesting is here the ranking of the UK and Sweden as both countries are probably compensating worse performance in relation to natural features such

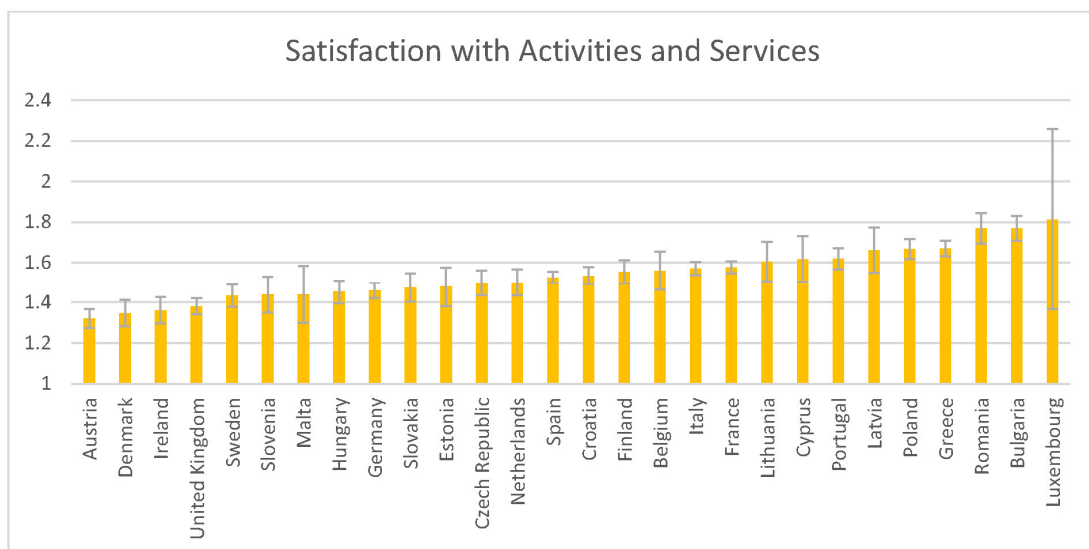


Figure 5. Satisfaction with Activities and Services in EU Countries Including 95% Confidence Intervals

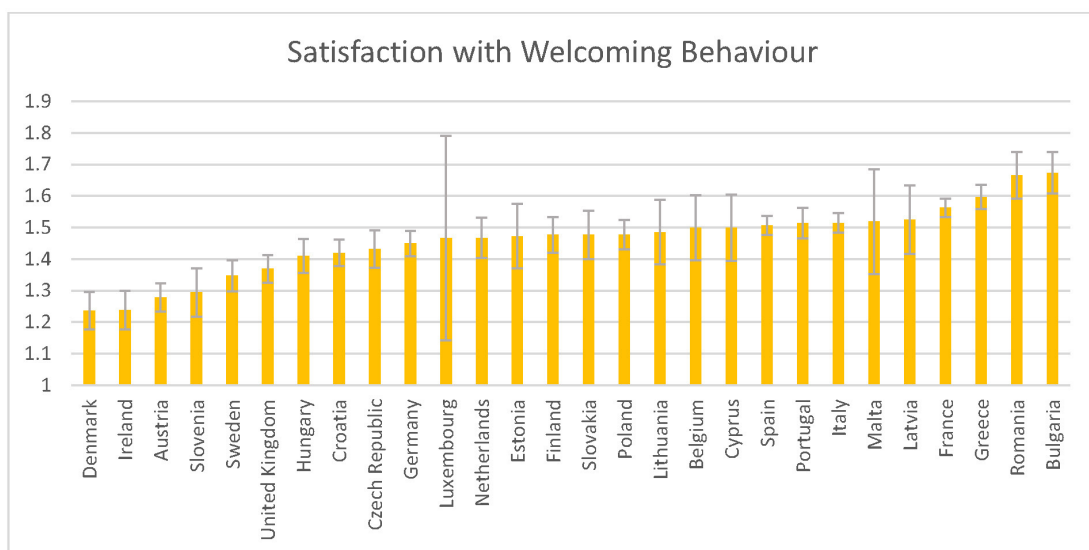


Figure 6. Satisfaction with Welcoming Behaviour in EU Countries Including 95% Confidence Intervals

as weather by the quality of services and offered activities.

The satisfaction with welcoming behaviour is quite consistent for majority of EU countries with some countries performing significantly better or worse (Figure 6). The best performers are Denmark, Ireland, Austria and Slovenia. The worst performers are again

Romania, Bulgaria, Greece and France. This feature may be tightly related to culture as the North - South divide is clearly visible.

The last satisfaction question was focused on fulfilment of special needs as is shown in Figure 7. The general level of this satisfaction is the worst when compared with all the previous figures and

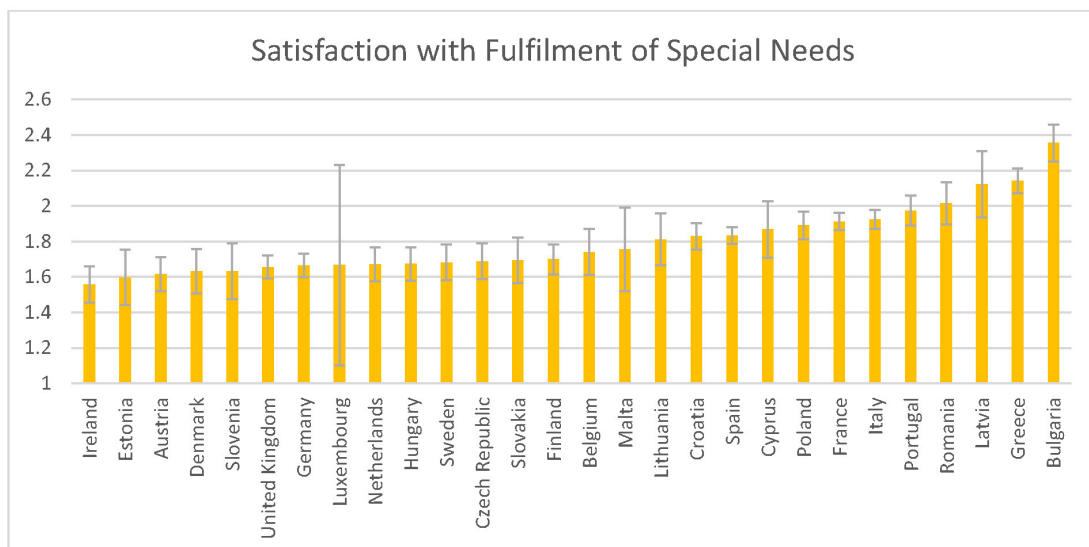


Figure 7. Satisfaction with Fulfilment of Special Needs in EU Including 95% Confidence Intervals

there is also no significant improvement over years. This may provide an opportunity both for specialized and mass service providers as it is possible to identify segments of tourists that are dissatisfied.

Again, in this respect NE and WE countries perform amongst the best, followed by CEE and SME countries. Some of the countries have really dissatisfied tourists with overall average value above 2 which may signal serious problems – these are Bulgaria, Greece, Latvia and Romania. The best performers are Ireland, Estonia, Slovenia, Austria.

To summarize the results, EU tourists spending their holidays in some of the EU countries tend to be generally more satisfied than tourists in other countries, especially with regards to the quality of services in general. The best performing countries such as Austria, Denmark, Ireland or Slovenia may serve as candidates for benchmarking and further research about how they achieve such consistently high level of tourist satisfaction.

The highest satisfaction was generally with the natural features and quality and safety of accommodation and the lowest satisfaction was with the fulfilment of special needs and price level. This shows some of the strengths and opportunities for improvement,

especially in countries which are lagging behind.

There are also some countries that perform consistently better or worse than average. Generally, more developed countries achieve better results but there are some exemptions that cannot be explained purely on the basis of development – it seems that culture may play a significant role too, especially with regards to welcoming behaviour and quality of services.

Interestingly, higher prices tend not to influence the satisfaction when compensated by high quality of service. And lower prices seem not to be enough to compensate generally poor service.

V. Discussion

As similar research studies comparing satisfaction of tourists on macro level in various destination countries are missing, it is possible to discuss the research findings only on a general level.

From this point of view, data suggest that when dealing with holidays, price is not the main determinant

of satisfaction for European tourists and more important is the service quality – accommodation, activities and welcoming behaviour.

Also, culture seems to be playing a significant role and it might be necessary to manage tourist expectations and increase their cultural understanding, especially in relation to some of the Southern European and Central and Eastern European countries.

Another interesting addition of this research may be related the Travel & Tourism Competitiveness Report 2017 (World Economic Forum, 2017) where the overall ranking significantly differs in comparison to the satisfaction scores calculated in this study. Of course, the methodology is completely different, but one would expect that significant improvement of satisfaction scores would also lead to the change in overall ranking which is not the case for instance in Estonia.

In addition, correlation analysis of partial TTCI components with satisfaction factors from Eurobarometer has revealed some interesting and statistically significant results on $\alpha = 0.05$. Correlation coefficient are negative here because satisfaction indices used in the Eurobarometer surveys use lower numbers for higher satisfaction.

For instance, Degree of customer orientation (component of TTCI) correlates moderately with the quality of the accommodation (-0.6653), how tourists are welcomed (-0.5665) or accessible facilities for people with special needs (-0.5402). Extent of staff training (TTCI) correlates moderately with accessible facilities for people with special needs (-0.6005) or the quality of the accommodation (-0.5984). Interesting finding shows also the correlation between Female participation in the labour force (TTCI) and how tourists are welcomed (-0.2634), which we find quite surprising. Hotel price index (TTCI) weakly correlates with the general level of prices (-0.2674), activities/services available (-0.2537) or quality of accommodation (-0.2419). Natural resources index (TTCI) weakly correlates with tourists' satisfaction with natural features (-0.3837).

The results of correlation analysis between several TTCI components and specific factors of tourists'

satisfaction from Eurobarometer show interesting relationships, which are worth to be analysed in more detail in future research.

The findings also suggest that one of the important satisfaction determinants is the weather and when climate changes would lead to sudden weather events this all may negatively influence tourism and tourist satisfaction in bigger regions. This partial satisfaction is not under destination control but together with price level satisfaction is highly volatile. To decrease its' influence on the overall satisfaction, attempts to compensate for inconveniences like that may improve the resulting satisfaction, either through price or other means – as for example Bambauer-Sachse & Rabeson (2015) propose.

There are of course some limitations of this study. The datasets, even though extensive, deal only with EU member countries and are not longitudinal and numbers of responses are for some countries quite limited (e.g. Luxembourg). Also, a question about overall satisfaction is missing which may be different to the partial factors of satisfaction (Vajčnerová, Žiaran, Ryglová, & Andráško, 2014) – it would be good to add it into the future studies in this direction.

Another limitation is related to the methods used – due to the explorative nature and scope of this paper, only basic statistics have been used. For the future research, more detailed analysis could be used, e.g. correlation and factor analysis of satisfaction variables, regression analysis of these variables and changes in incoming tourist numbers in the following years, identification of tourist segments through cluster analysis and further exploration of different types of visitors and their satisfaction. This would be possible especially for EU countries with big enough samples such as Spain, Italy, France or Greece.

The same type of questions for satisfaction measurement can also be used for destinations on regional level to see whether satisfaction results are better or worse than national average and in which way they should improve their activities.

The crucial question is, which benchmarking approach should be selected and what to benchmark in relation to the tourists' satisfaction. Generally, if

we want to benchmark tourism destinations, it is necessary to measure, analyse and evaluate more factors and variables. But the customer satisfaction can be considered as one of the most important parts of destination performance and thus also as one of the greatest sources of competitive advantage. The concepts of *performance and satisfaction* (gap analysis) can be used to benchmark strengths and weaknesses of different international destinations by considering actual tourist experiences (Kozak, 2002).

There are also several possible approaches for benchmarking of EU countries as tourism destinations from the tourists' satisfaction point of view. One approach, *against the best* (Kozak, 2002) is suitable for measuring the performance and success of a country on the tourism market and can be practically used by National Tourism Organisations for identification of best practices and main drivers of tourist satisfaction.

Another approach can be based on *average values* to identify strengths and weaknesses of the EU countries in comparison to selected competitors or groups of competitors. For instance, to benchmark countries within their natural territory, e.g. Central and Eastern Europe, Northern Europe etc. The results can then be for example used by destination management organization on national level for increasing competitiveness.

The approach of *gaining new information* (Kozak, 2002) can be used as a reliable source of data for researchers as a part of more complex models of destination competitiveness, sustainability and management efficiency. One of such models is the aim of the future research of the authors and it is mentioned below.

Findings of this study can be used in a future research exploring relationships between tourist satisfaction and behaviour, such as numbers of visitors of the EU countries and receipts from inbound tourism in EU countries as tourism destinations. Another option is a development and calibration of demand forecasting and policy-testing models for management of tourism destinations or quality management.

VI. Conclusions

The main research questions of this exploratory study were to find out how are European Union tourists satisfied with their main holidays spent in European Union countries and identify what are the strengths and weaknesses related to tourist satisfaction with holidays in various European Union countries.

To answer these questions, data from the Flash Eurobarometer surveys about preferences of Europeans towards tourism have been used and analysed.

The highest satisfaction was generally found in relation to the natural features and quality and safety of accommodation and the lowest satisfaction was with the fulfilment of special needs and price level. This shows some of the strengths and opportunities for improvement, especially in countries lagging behind.

Some countries on one hand show significantly better performance in tourist satisfaction, e.g. Austria, Denmark, Slovenia or Ireland, others on the other hand lag behind a lot, e.g. Romania, Bulgaria, Latvia, Lithuania or Greece.

This research partially fills the gap in studying tourist satisfaction on macro country level, at least for European Union countries. It is also possible to use the results for benchmarking between European countries and to compare tourist satisfaction data from micro level with these macro scores.

Acknowledgement

This work was supported by the University of South Bohemia in České Budějovice, Czech Republic from GA JU 074/2017/S.

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