

The **2011**
Hong Kong Polytechnic University
Tourist Satisfaction Index

Table of Contents

List of Figures	2
Executive Summary	3
1 Introduction	4
2 Tourist Satisfaction Indices by Source Market	5
2.1 Americas	5
2.2 Australia, New Zealand and Pacific	6
2.3 Europe, Africa and Middle East	7
2.4 Japan and Korea	8
2.5 Mainland China	9
2.6 South and Southeast Asia	10
2.7 Taiwan and Macau	11
2.8 Overall Tourist Satisfaction Indices by Source Market	12
3 Tourist Satisfaction Indices by Service Sector	13
3.1 Attractions	13
3.2 Hotels	14
3.3 Immigration	15
3.4 Restaurants	16
3.5 Retail Shops	17
3.6 Transportation	18
3.7 Overall Tourist Satisfaction Indices by Sector	19
4 PolyU Tourist Satisfaction Index	20
5 PolyU Tourist Satisfaction Index Comparison	21
6 Overall Tourist Satisfaction Indices by Destination	22
6.1 Attractions	22
6.2 Hotels	23
6.3 Immigration	23
6.4 Restaurants	24
6.5 Retail Shops	24
6.6 Transportation	25
6.7 Overall Tourist Satisfaction Indices by Destination	25
7 Conclusion	26

List of Figures

Figure 1	Tourist Satisfaction Index – Americas	5
Figure 2	Tourist Satisfaction Index Weights – Americas	5
Figure 3	Tourist Satisfaction Index – Australia, New Zealand and Pacific	6
Figure 4	Tourist Satisfaction Index Weights – Australia, New Zealand and Pacific	6
Figure 5	Tourist Satisfaction Index – Europe, Africa and Middle East	7
Figure 6	Tourist Satisfaction Index Weights – Europe, Africa and Middle East	7
Figure 7	Tourist Satisfaction Index – Japan and Korea	8
Figure 8	Tourist Satisfaction Index Weights – Japan and Korea	8
Figure 9	Tourist Satisfaction Index – Mainland China	9
Figure 10	Tourist Satisfaction Index Weights – Mainland China	9
Figure 11	Tourist Satisfaction Index – South and Southeast Asia	10
Figure 12	Tourist Satisfaction Index Weights – South and Southeast Asia	10
Figure 13	Tourist Satisfaction Index – Taiwan and Macau	11
Figure 14	Tourist Satisfaction Index Weights – Taiwan and Macau	11
Figure 15	Overall Tourist Satisfaction Index by Source Market	12
Figure 16	Tourist Satisfaction Index – Attractions	13
Figure 17	Tourist Satisfaction Index – Hotels	14
Figure 18	Tourist Satisfaction Index – Immigration	15
Figure 19	Tourist Satisfaction Index – Restaurants	16
Figure 20	Tourist Satisfaction Index – Retail Shops	17
Figure 21	Tourist Satisfaction Index – Transportation	18
Figure 22	Overall Tourist Satisfaction Index by Sector	19
Figure 23	PolyU Tourist Satisfaction Index Weights	20
Figure 24	PolyU Tourist Satisfaction Index Scores from 2009 to 2011	21
Figure 25	Overall Tourist Satisfaction Indices by Destination – Attractions	22
Figure 26	Overall Tourist Satisfaction Indices by Destination – Hotels	23
Figure 27	Overall Tourist Satisfaction Indices by Destination – Immigration	23
Figure 28	Overall Tourist Satisfaction Indices by Destination – Restaurants	24
Figure 29	Overall Tourist Satisfaction Indices by Destination – Retail Shops	24
Figure 30	Overall Tourist Satisfaction Indices by Destination – Transportation	25
Figure 31	Overall Tourist Satisfaction Indices by Destination	25

Executive Summary

This report presents the Hong Kong tourist satisfaction indices for 2011. The results are obtained from the PolyU Tourist Satisfaction Index system, which has been developed by the School of Hotel and Tourism Management, The Hong Kong Polytechnic University. The system measures the satisfaction levels of Hong Kong inbound tourists across six tourism-related sectors and integrates them into an overall index.

The results for this year are slightly lower than last year but the tourists are generally satisfied with the services received during their visits in Hong Kong. The sectors that have consistently excelled in service performance are the attraction and transportation sectors. The satisfaction index for the immigration is somewhat lower than last year but like the hotels, restaurants and retail shops they are characterized by positive results and have managed to exceed the expectations of the tourists.

The PolyU Tourist Satisfaction Index for 2011 is 72.61 out of a maximum score of 100. Although uplifting results are reported for the retail shops and the restaurants, the majority of the service sectors show a slight decline in performance across all source markets this year. Consistency is noticeable in terms of the tourist satisfaction indices by sector and by source markets. Like previous years the tourists from western countries report consistently higher satisfaction index scores than those reported by source markets from Asia.

Overall, Hong Kong's position remains competitive and performs well across comparable sectors. By using the PolyU Tourist Satisfaction Index system Hong Kong is able to determine its performance and its competitiveness as an international tourism destination relative to others. The information obtained allows Hong Kong to be more competitive by identifying strategic areas for improvement. Measuring and monitoring tourist's satisfaction is important for the development and success of service industries in Hong Kong that depend on tourism.

1 Introduction

Hong Kong has taken and will continue to take considerable steps to improve its tourism infrastructure in order to enhance its overall attractiveness as an international tourism destination. But how does Hong Kong's tourism industry perform over time and relative to other destinations? Providing a general overview of the service performance of the most important and relevant sectors may help answer this question. The ability to continuously monitor and improve tourists' satisfaction may determine success in a sustainable manner. Essentially, satisfied tourists are more likely to return and recommend Hong Kong to others. By adopting universal performance reporting techniques, destinations can establish targets to assess its performance over time as well as provide meaningful comparisons with other international tourism destinations. We are grateful to our partners for sharing their preliminary results for useful benchmarking purposes which are shown in section six.

Institute for Tourism Studies	Macau Tourist Satisfaction Index
Shenzhen Tourism College	Shenzhen Tourist Satisfaction Index

Although slight variations in sectors and source markets are present, the overall results on comparable sectors provide valuable insights in the performance and competitiveness across international tourism destinations. The report presents the indices by sector and by source market. The table below shows the sample size by source market for the PolyU Tourist Satisfaction Index.

Sample Size by Source Market

Source Market	Sample Size
Americas	296
Australia, New Zealand and Pacific	325
Europe, Africa and Middle East	333
Japan and Korea	302
Mainland China	477
South and Southeast Asia	297
Taiwan and Macau	322
Total	2352

2 Tourist Satisfaction Indices by Source Market

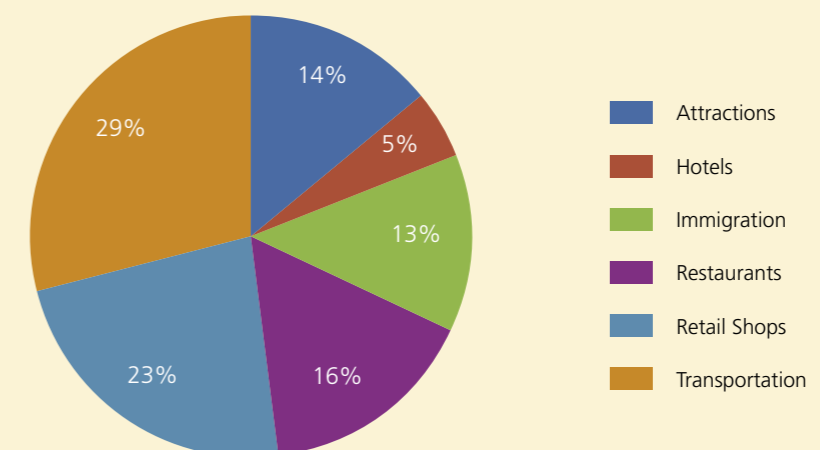
2.1 Americas

Among the six sectors, tourists from the Americas were most satisfied with the transportation sector (82.02) followed by attractions (81.29). The remaining four service providers are below an index of 80 points. The hotels experienced a noteworthy drop compared to the previous two years.

Figure 1 Tourist Satisfaction Index – Americas



Figure 2 Tourist Satisfaction Index Weights – Americas



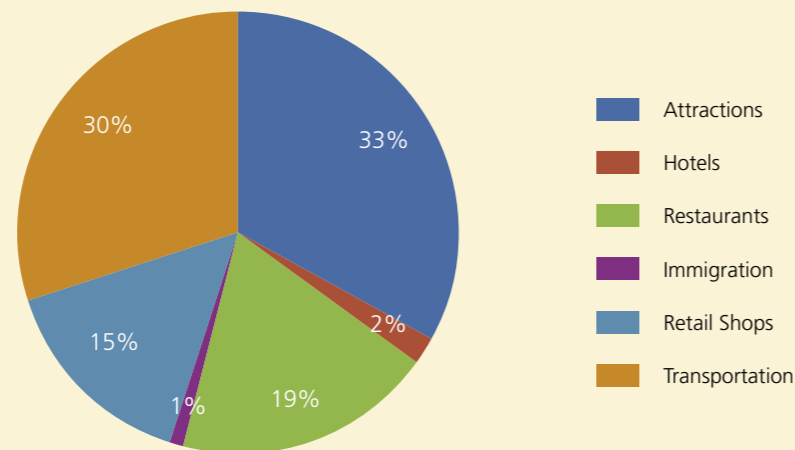
2.2 Australia, New Zealand and Pacific

Tourists from Australia, New Zealand and the Pacific were most satisfied with the transportation sector (85.37), followed by the attractions (78.25) and hotels (75.86). The last three sectors were all below 75 index points: restaurants (74.52), retail shops (72.86), and notable decrease for the immigration services (71.07).

Figure 3 Tourist Satisfaction Index – Australia, New Zealand and Pacific



Figure 4 Tourist Satisfaction Index Weights – Australia, New Zealand and Pacific



2.3 Europe, Africa and Middle East

The tourists from Europe, Africa and the Middle East were most satisfied with the transportation sector (81.23), followed by the attractions (78.56) and the retail shops (72.59). The restaurants (70.76) managed to stay above an index score of 70, while the hotels (69.66) and immigration services (69.21) are slightly below it.

Figure 5 Tourist Satisfaction Index – Europe, Africa and Middle East

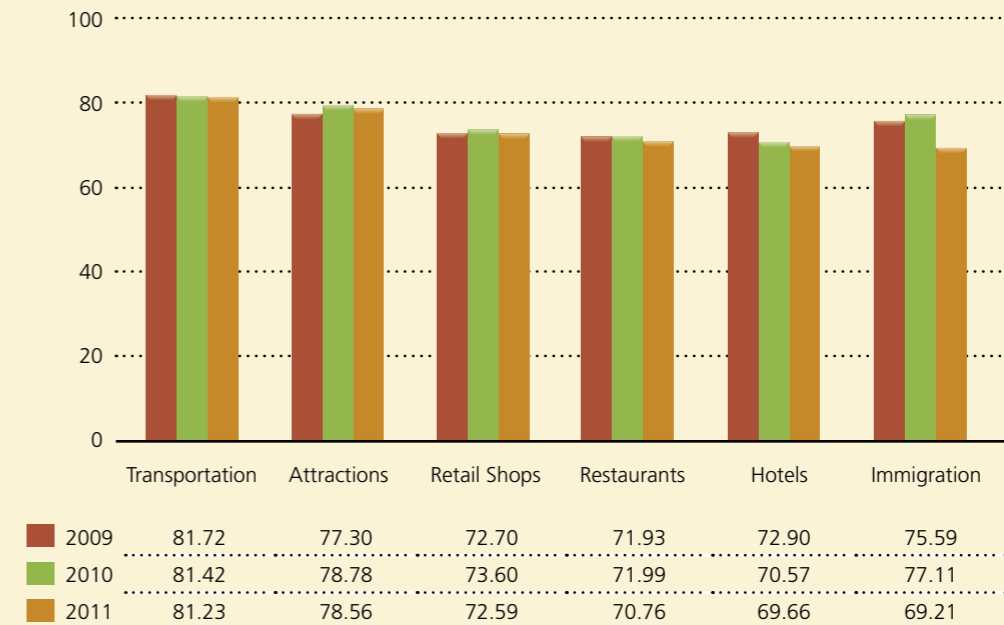
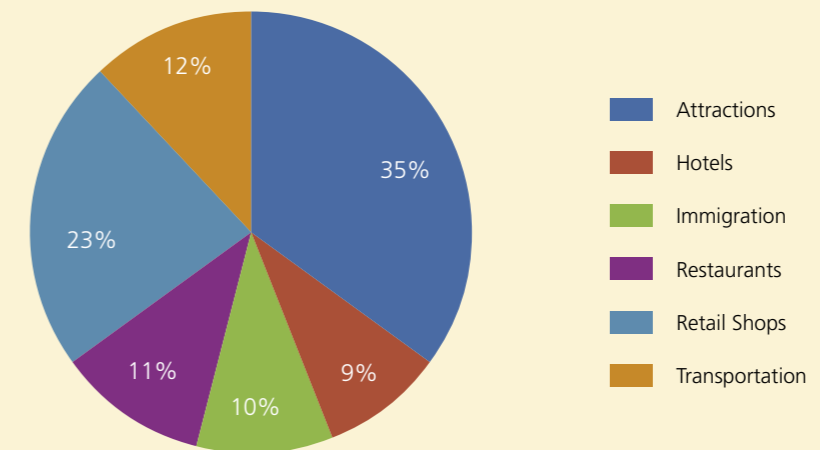


Figure 6 Tourist Satisfaction Index Weights – Europe, Africa and Middle East



2.4 Japan and Korea

Like last year, visitors from Japan and Korea were most satisfied with the transportation sector (68.59). The attractions (65.06) and hotels (62.91) are second and third. The remaining three sectors are below 63 index points: restaurants (62.48), retail shops (60.88) and immigration services (59.01).

Figure 7 Tourist Satisfaction Index – Japan and Korea

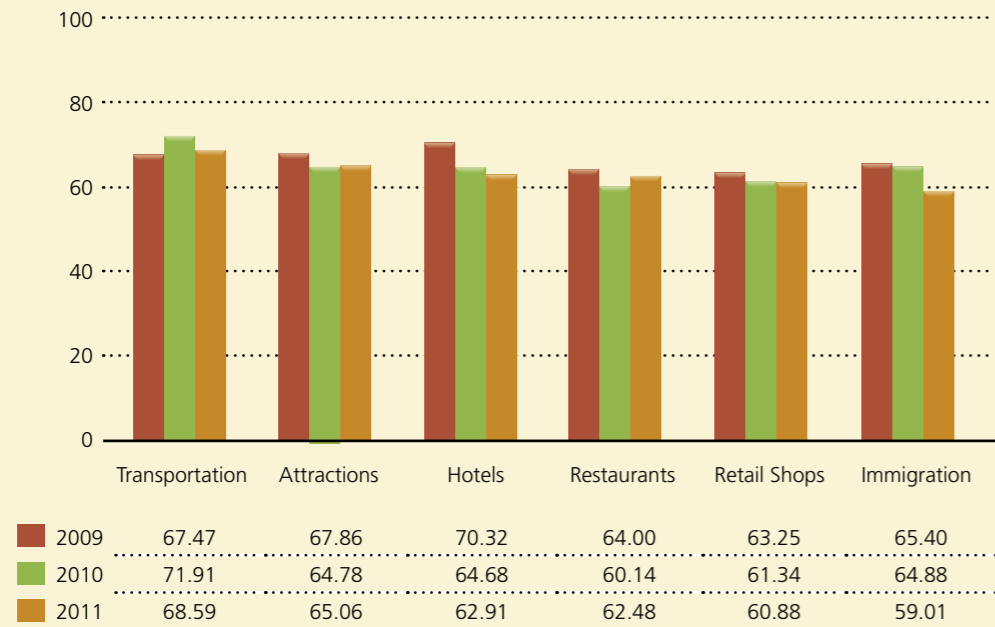
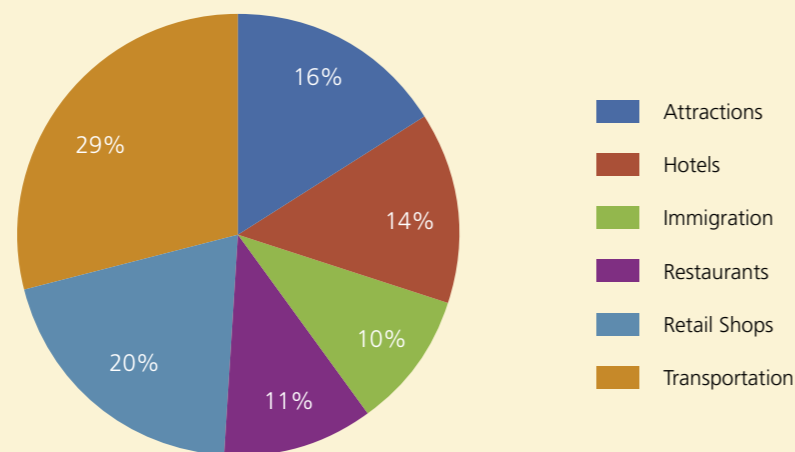


Figure 8 Tourist Satisfaction Index Weights – Japan and Korea



2.5 Mainland China

The standing of the index scores for visitors from mainland China closely resembles last year's ranking. The mainland Chinese tourists were most satisfied with the transportation sector (78.32), which is followed by the attractions (77.00) and immigration sector (72.97). The remaining sectors are hotels, retail shops and restaurants with satisfaction indices of 72.08, 71.15 and 63.71, respectively.

Figure 9 Tourist Satisfaction Index – Mainland China

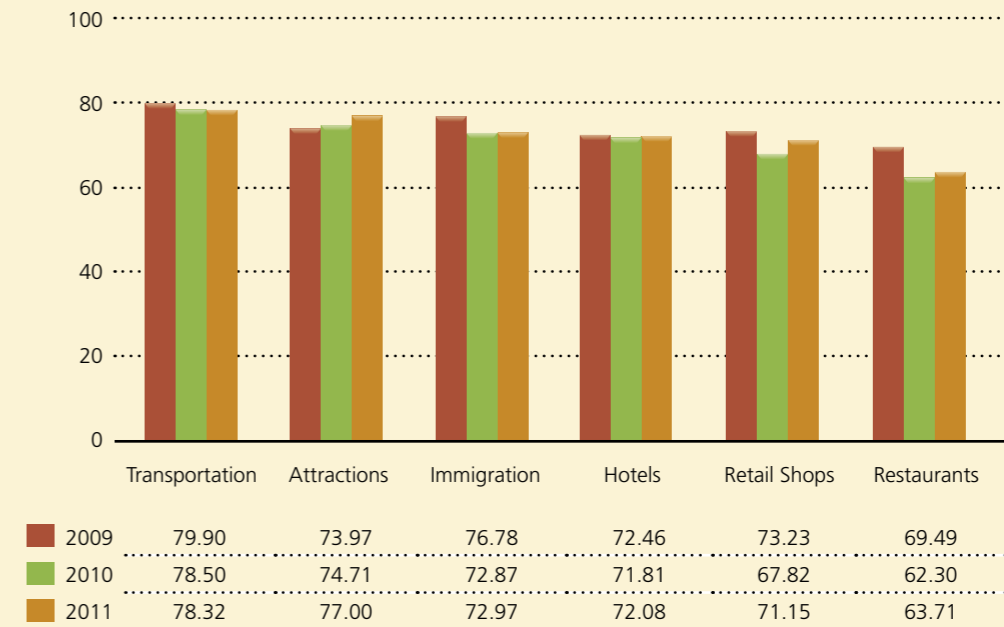
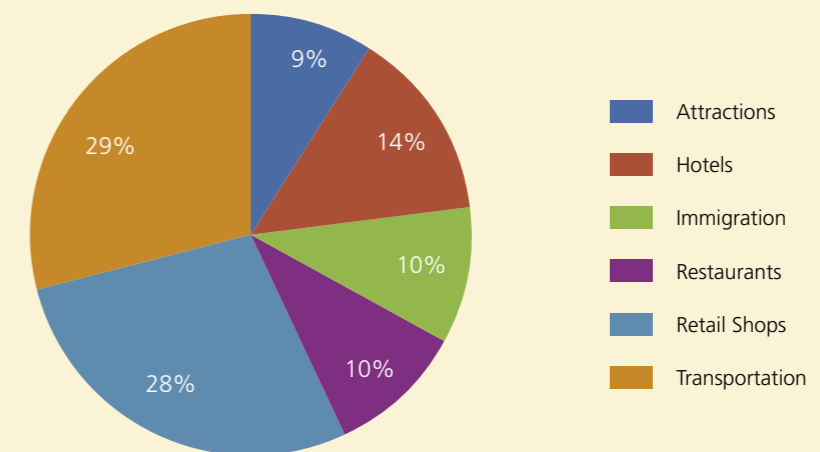


Figure 10 Tourist Satisfaction Index Weights – Mainland China



2.6 South and Southeast Asia

With an index score below 70, the respondents from South and Southeast Asia were the least satisfied with the restaurants (67.72) and the hotels (68.13). The immigration services (70.04) rank fourth, the transportation (75.15), attractions (73.98) and retail shops (70.74) received the higher satisfaction index scores.

Figure 11 Tourist Satisfaction Index – South and Southeast Asia

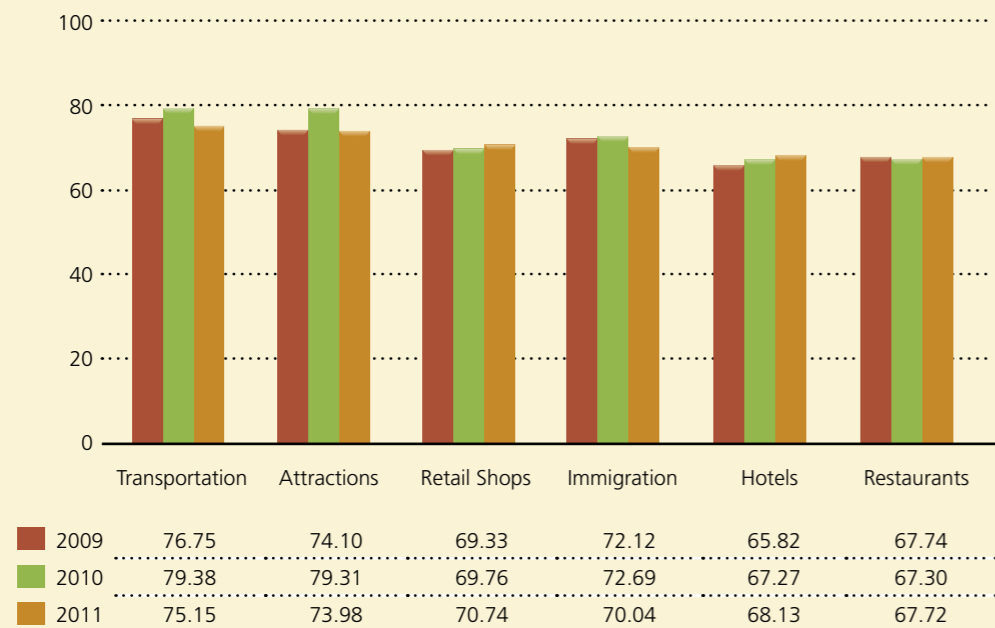
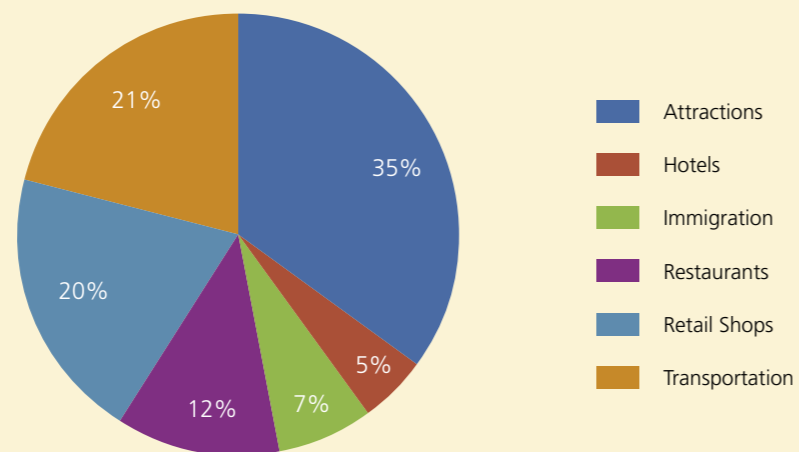


Figure 12 Tourist Satisfaction Index Weights – South and Southeast Asia



2.7 Taiwan and Macau

The highest satisfaction index score was awarded to the transportation sector (73.08) by the tourists from Taiwan and Macau. Second are the visited attractions (67.63) and the immigration services are third (67.13). The remaining three sectors are below 65 index points: hotels (64.97), shops (63.33) and restaurants (62.05).

Figure 13 Tourist Satisfaction Index – Taiwan and Macau

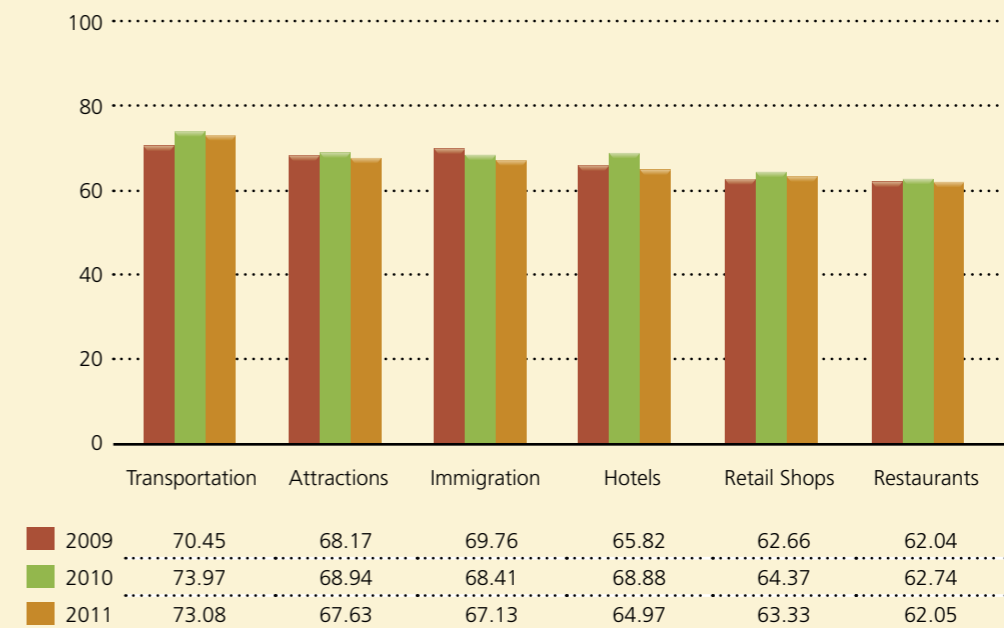
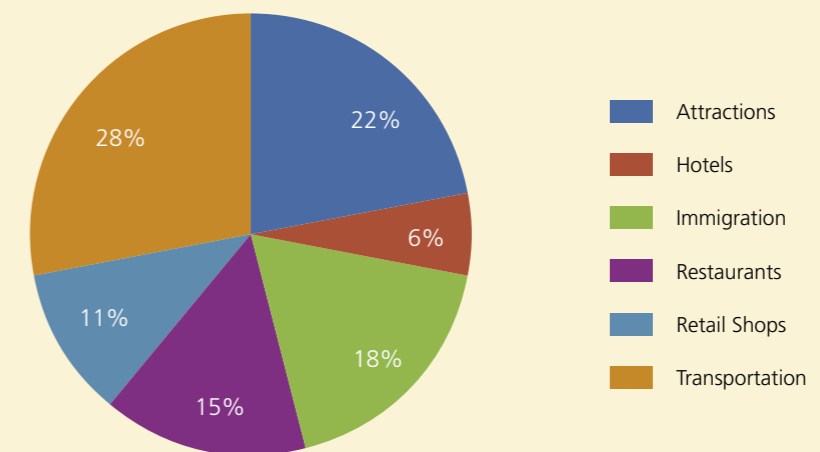


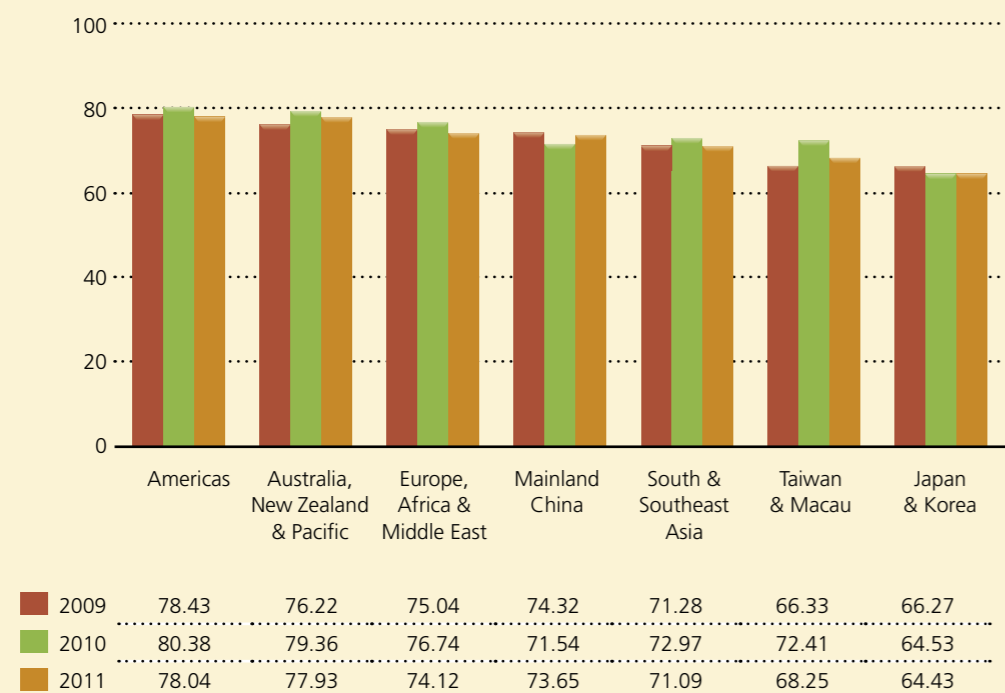
Figure 14 Tourist Satisfaction Index Weights – Taiwan and Macau



2.8 Overall Tourist Satisfaction Indices by Source Market

While the current overall results are slightly lower than the preceding years, they are remarkably consistent in terms of ranking and market distribution. The source market with the highest satisfaction index is the Americas with an overall score of 78.04. Although tourists from the Americas generously awarded all the service providers index scores above 70 points, the hotel sector only marginally topped this. Visitors from Australia, New Zealand and the Pacific region are second with an overall satisfaction index score of 77.93. The third most satisfied tourists come from Europe, Africa and the Middle East and attributed to an overall score of 74.12. Like the previous years, the remaining four source markets are all from Asia. The mainland Chinese tourists are the most satisfied Asian market with an overall tourist satisfaction index of 73.65. The next group of visitors comes from South and Southeast Asia, with an index figure of 71.09. The two remaining markets are Taiwan and Macau, and Japan and Korea, showing overall satisfaction index scores of 68.25 and 64.43, respectively.

Figure 15 Overall Tourist Satisfaction Index by Source Market

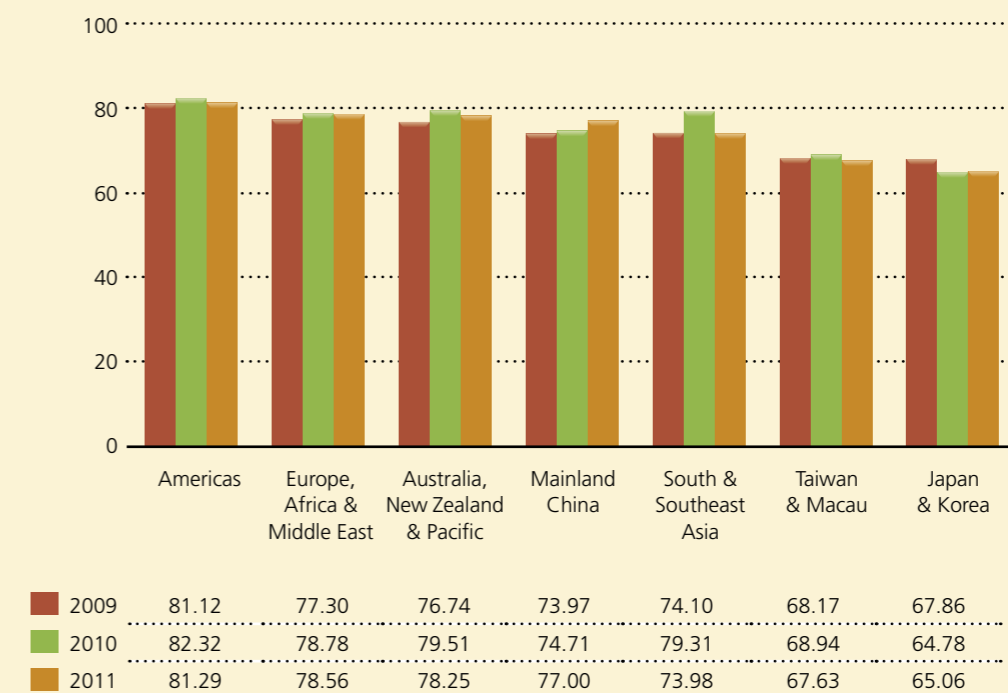


3 Tourist Satisfaction Indices by Service Sector

3.1 Attractions

The tourists from the Americas awarded the highest satisfaction scores to the attractions (81.29), followed by visitors from Europe, Africa and Middle East (78.56), Australia, New Zealand and the Pacific (78.25), Mainland China (77.00) and South and Southeast Asia (73.98). With points lower than 70, the index for Taiwan and Macau is 67.63 and a score of 65.06 is noted for Japan and Korea.

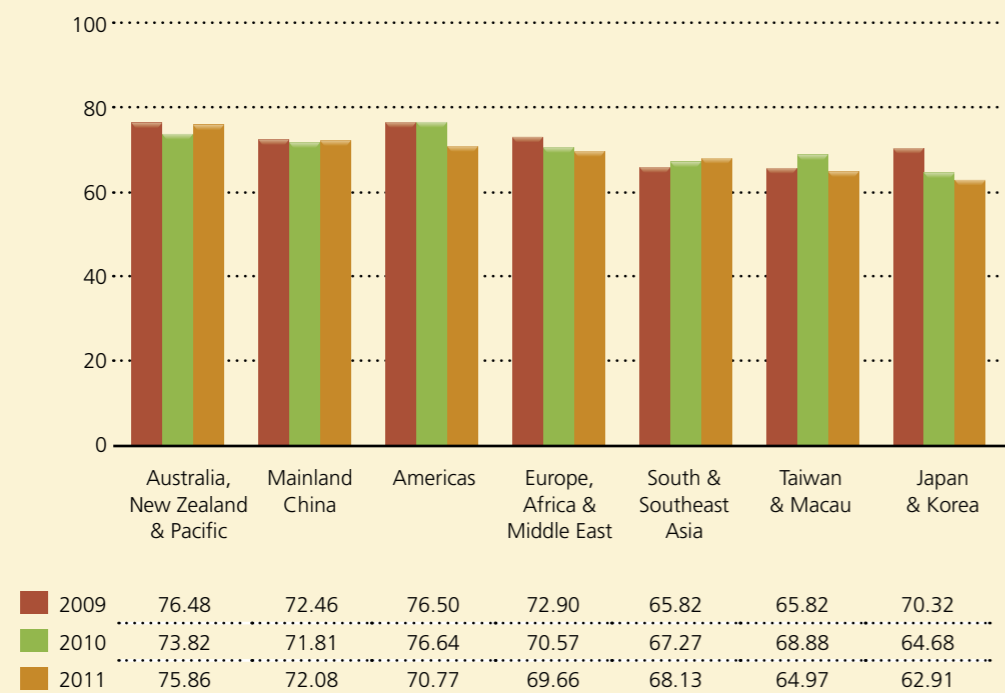
Figure 16 Tourist Satisfaction Index – Attractions



3.2 Hotels

The hotels received the highest satisfaction score from the tourists from Australia, New Zealand and the Pacific region (75.86). The mainland Chinese respondents gave a score of 72.08 to the hotel sector. The satisfaction index for tourists from the Americas dropped to an index of 70.77. The index points for Europe, Africa and the Middle East and South and Southeast Asia are 69.66 and 68.13, respectively. Taiwan and Macau and Japan and Korea have index scores of 64.97 and 62.91.

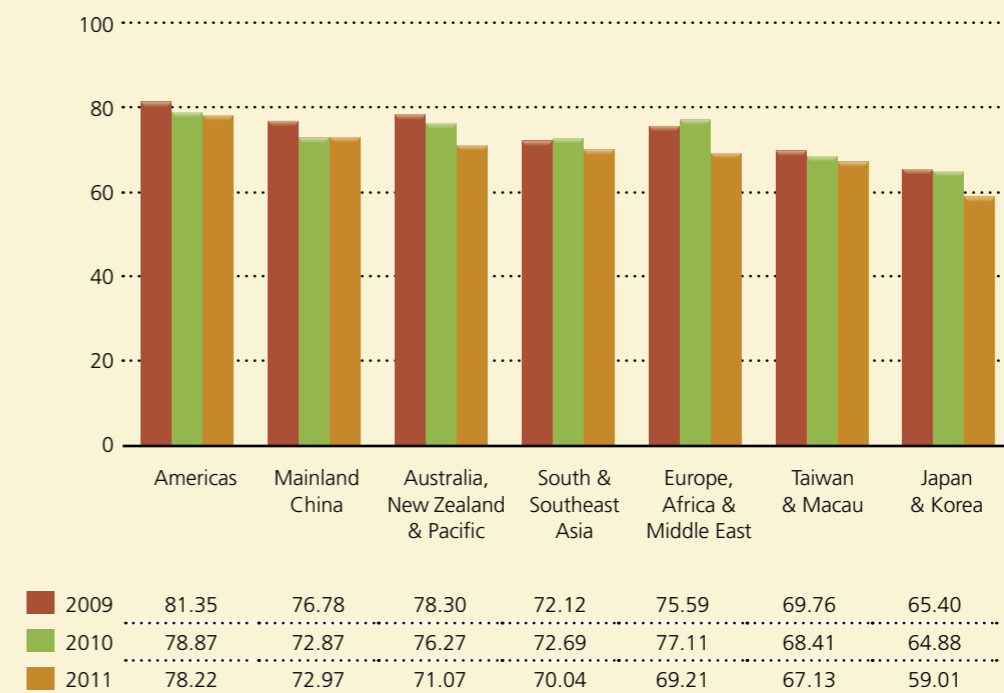
Figure 17 Tourist Satisfaction Index – Hotels



3.3 Immigration

The immigration service received the highest satisfaction score from the American tourists (78.22). Visitors from mainland China (72.97) and Australia, New Zealand and the Pacific (71.07) are second and third. The respondents from the South and Southeast Asia region (70.04) and those from the Europe, Africa and Middle East region (69.21) were less satisfied with the immigration sector. The index figure of Taiwan and Macau is 67.13, followed by Japan and Korea (59.01).

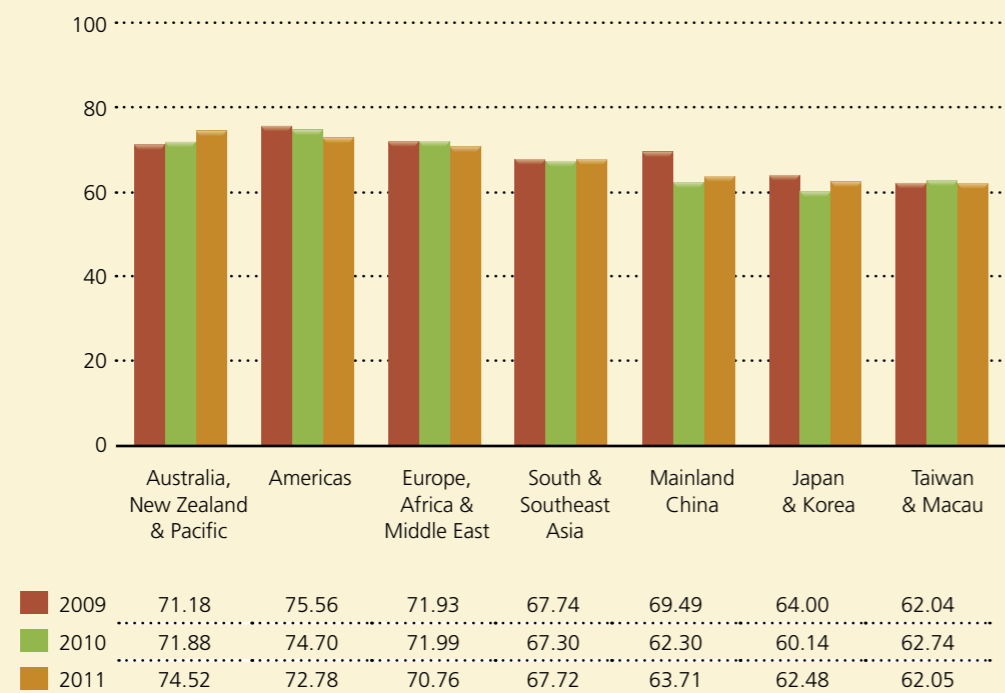
Figure 18 Tourist Satisfaction Index – Immigration



3.4 Restaurants

The tourists from Australia, New Zealand and the Pacific rate their satisfaction with the Hong Kong restaurants the highest (74.52), followed by the Americas (72.78) and visitors from Europe, Africa and the Middle East gave an overall score of 70.76. The respondents from the four remaining Asian source markets awarded lower satisfaction scores to the restaurants with the index figures below 68 points.

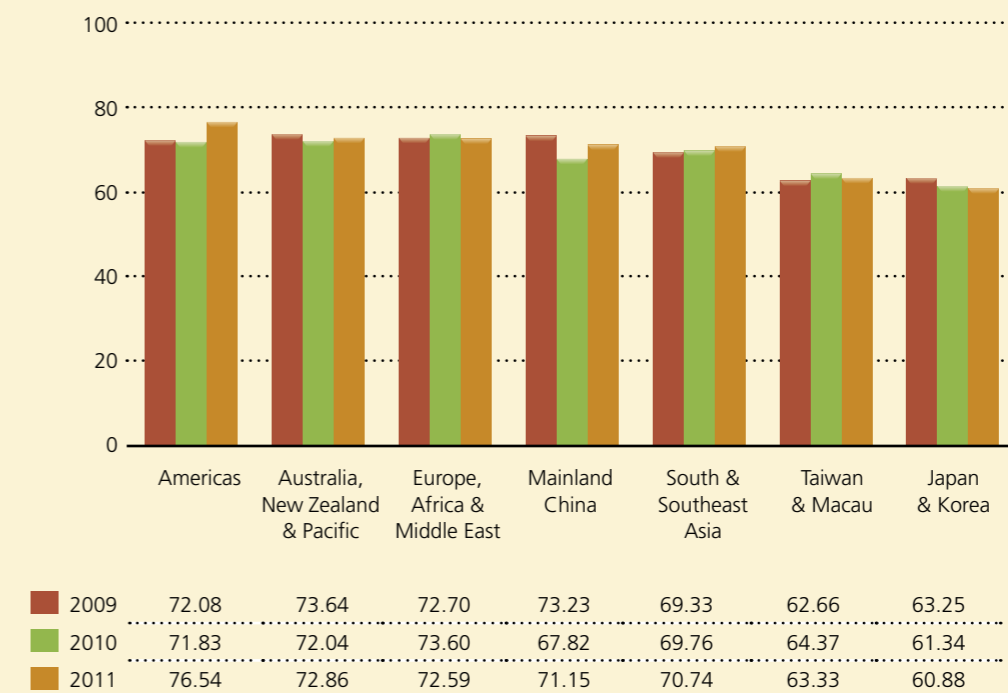
Figure 19 Tourist Satisfaction Index – Restaurants



3.5 Retail Shops

Tourists from the Americas were most satisfied with the services provided by the local retail shops (76.54), followed by those from Australia, New Zealand and the Pacific (72.86). The index score for the Europe, Africa and Middle East region is 72.59. The four Asian source markets report satisfaction index scores below 72 points.

Figure 20 Tourist Satisfaction Index – Retail Shops



3.6 Transportation

The transportation sector received the highest satisfaction score from the tourists from Australia, New Zealand and the Pacific region (85.37). The Americas awarded 82.02 points and the visitors from Europe, Africa and the Middle East gave a score of 81.23. The remaining four regions are in Asia with the index figures below 79 points. The index score for mainland China is 78.32, followed by South and Southeast Asia (75.15), Taiwan and Macau (73.08), and Japan and Korea (68.59).

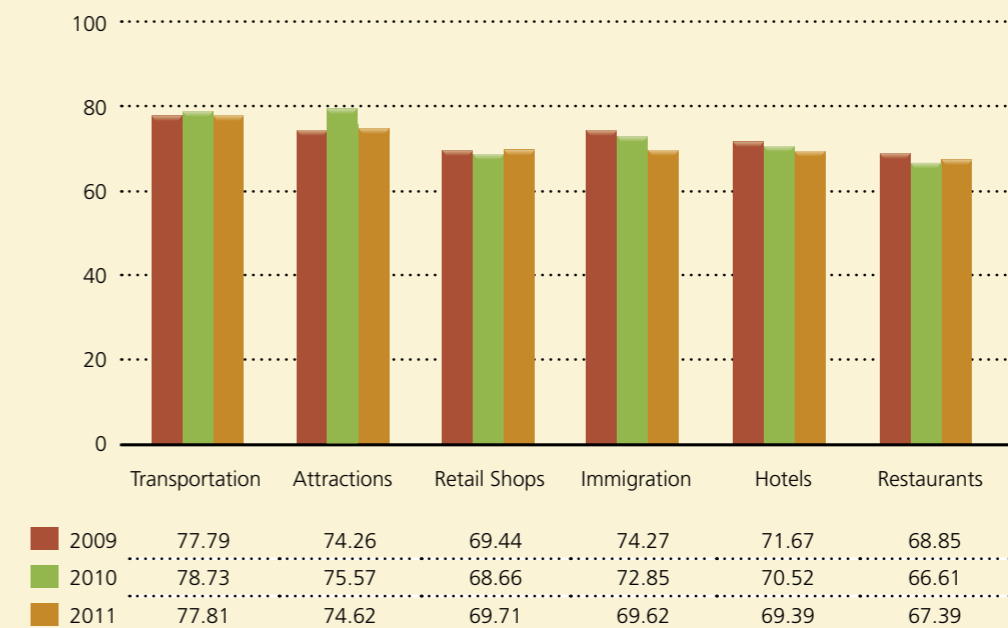
Figure 21 Tourist Satisfaction Index – Transportation



3.7 Overall Tourist Satisfaction Indices by Sector

Despite the fact that the current overall results for the service sectors are only marginally lower than the previous years, they are very consistent in terms of their ranking. The transportation sector (77.81) has been receiving the highest satisfaction evaluations from the tourists for three consecutive years. The same trend is found for the restaurants, albeit their index scores are at the other end and presently awarded with an overall tourist satisfaction index of 67.39. Places have been swapped at midpoint but the attractions remain second with an overall satisfaction index of 74.62 and now third are the retail shops (69.71). The overall tourist satisfaction index for the services provided by the immigration and hotels are for the first time below 70 index points. The immigration services are currently standing at 69.62 just before the hotels with an index score of 69.39.

Figure 22 Overall Tourist Satisfaction Indices by Sector

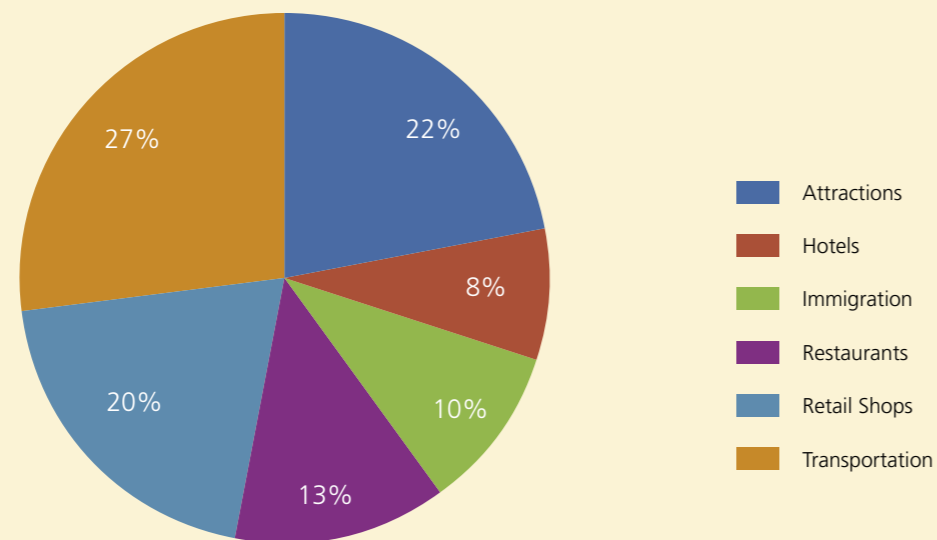


4 PolyU Tourist Satisfaction Index

Based on the overall results the PolyU tourist satisfaction index for 2011 is **72.61** out of a maximum score of 100. The index represents a general indication of the overall tourist satisfaction with Hong Kong as a destination based on their evaluation of the services encountered with the local attractions, hotels, immigration, transportation, restaurants and retail shops. As shown in the chart below, the estimated weights indicate the difference in terms of unique contribution to overall tourist satisfaction by each service provider. For example, the transportation sector with 27% contributes the most to tourists' overall satisfaction while 8% can be credited to the hotels.



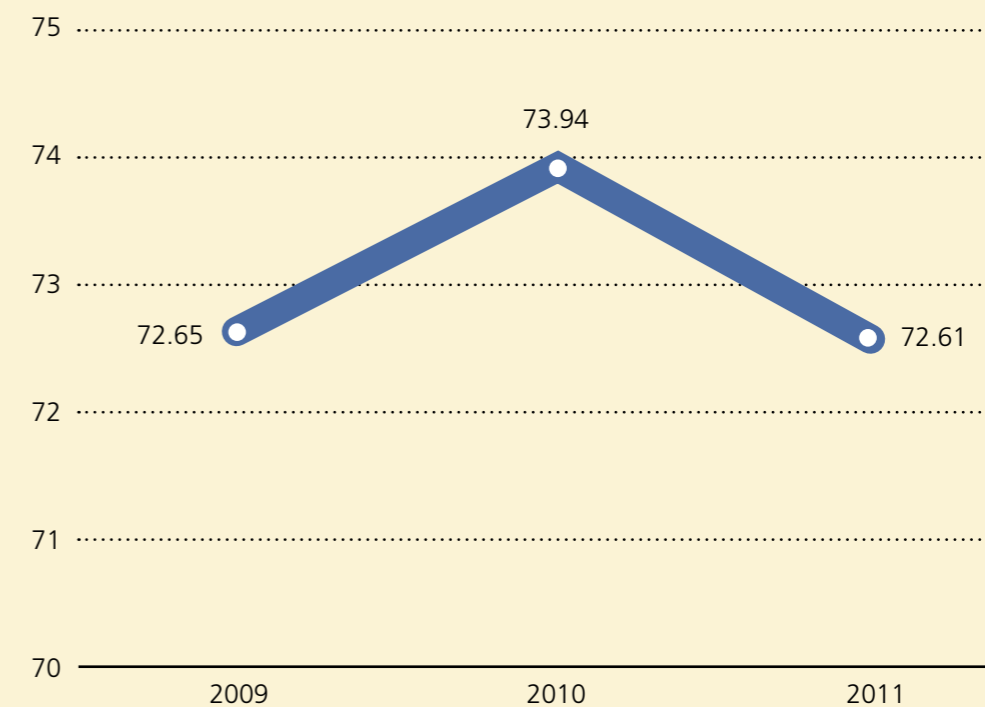
Figure 23 PolyU Tourist Satisfaction Index Weights



5 PolyU Tourist Satisfaction Index Comparison

The PolyU Tourist Satisfaction Index for 2011 is slightly lower than the previous two years. The baseline was set in 2009 with a score of 72.65 and this was surpassed in 2010 with a figure of 73.94. This illustrates that the overall tourist satisfaction with Hong Kong somewhat decreased since 2009. While the retail shops and restaurants have been performing up to par and above, the decline is mainly due to the underperformance of the other four service sectors. Nevertheless, the overall scores remain fairly consistent over the years and are above 70 index points which is a great compliment to all Hong Kong organizations that serve tourists on a regular basis.

Figure 24 PolyU Tourist Satisfaction Index Scores from 2009 to 2011

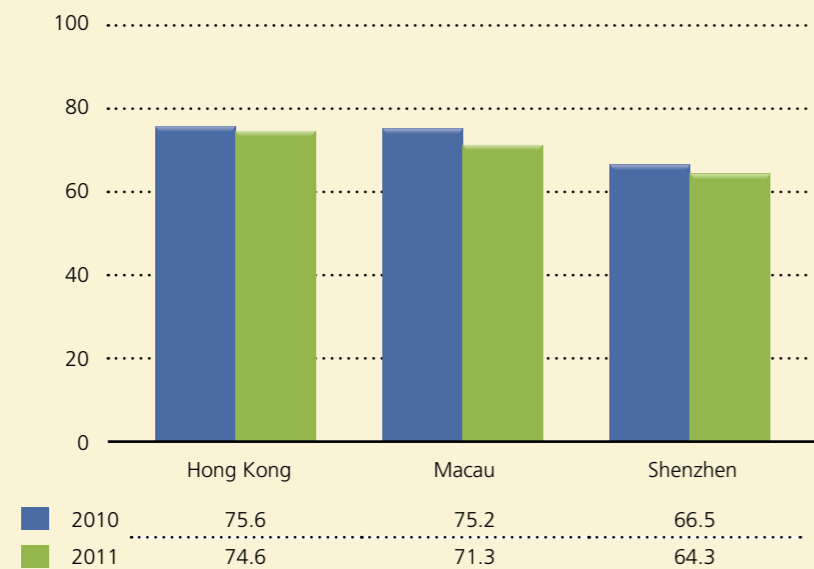


6 Overall Tourist Satisfaction Indices by Destination

6.1 Attractions

The visitors were most satisfied with the attractions in Hong Kong (74.6), followed by Macau (71.3), and Shenzhen (64.3).

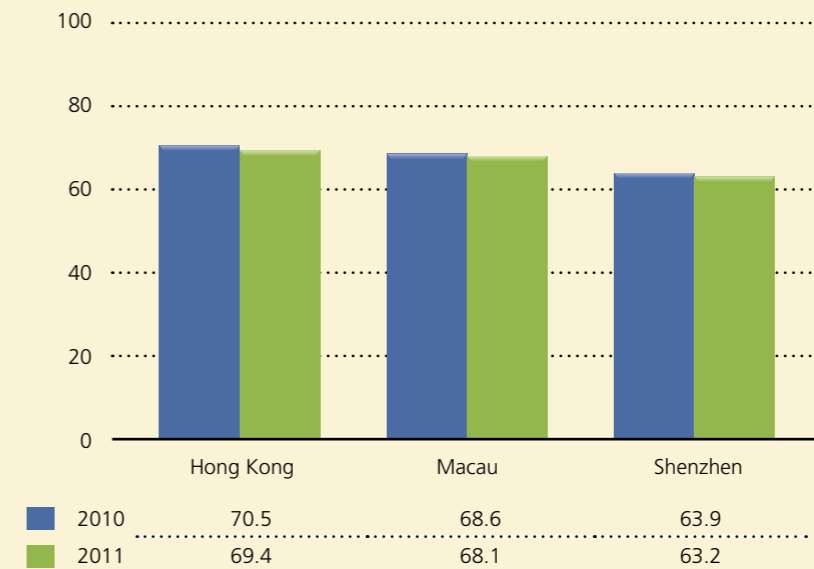
Figure 25 Overall Tourist Satisfaction Indices by Destination – Attractions



6.2 Hotels

The hotels received the highest satisfaction score from the respondents visiting Hong Kong (69.4), the index figure for Macau is 68.1 and Shenzhen reports an index of 63.2.

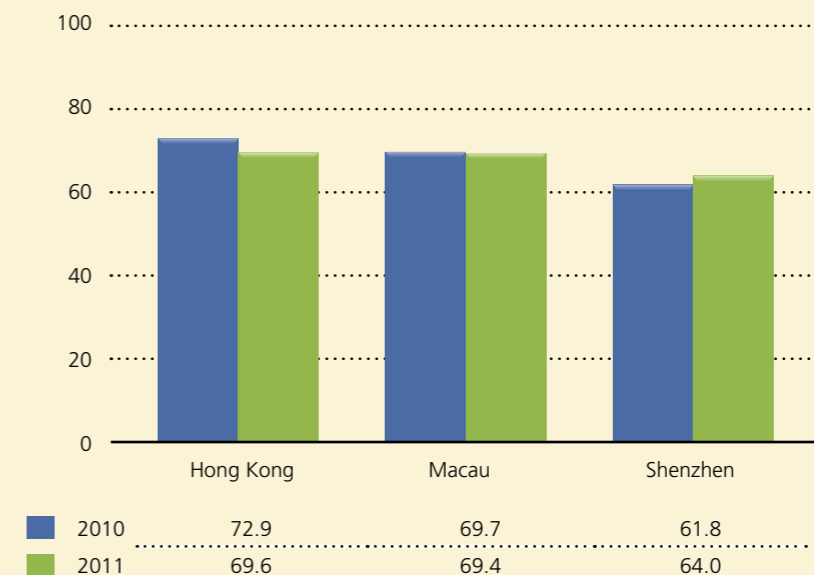
Figure 26 Overall Tourist Satisfaction Indices by Destination – Hotels



6.3 Immigration

The tourists were most satisfied with the immigration sector in Hong Kong (69.6), closely followed by Macau (69.4). The respondents awarded the immigration service in Shenzhen with an index score of 64.0.

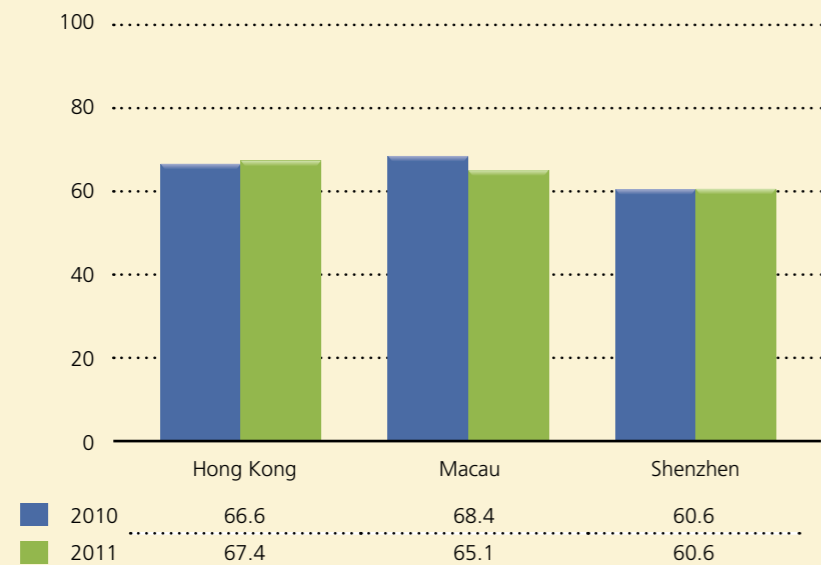
Figure 27 Overall Tourist Satisfaction Indices by Destination – Immigration



6.4 Restaurants

The restaurants received the highest satisfaction score from the respondents who visited Hong Kong (67.4). Tourists awarded the dining outlets in Macau with a satisfaction score of 65.1 and an index of 60.6 for restaurants in Shenzhen.

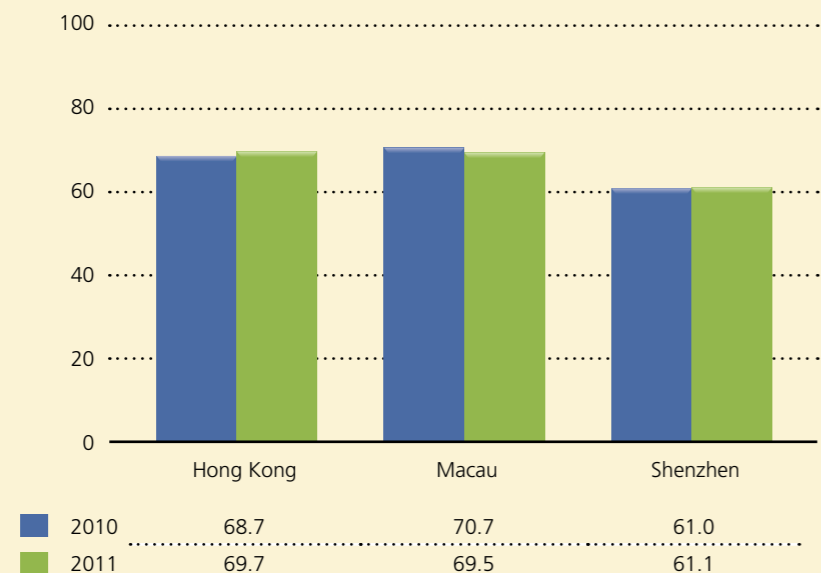
Figure 28 Overall Tourist Satisfaction Indices by Destination – Restaurants



6.5 Retail Shops

The index score for the retail shops in Hong Kong stands at 69.7 and tourists in Macau awarded the retail shops with an index of 69.5. The shoppers reported a satisfaction index score of 61.1 in Shenzhen.

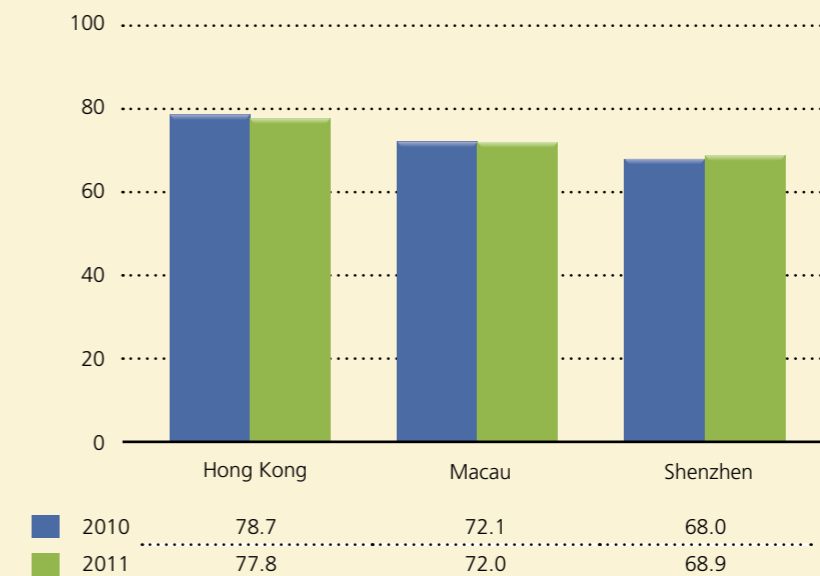
Figure 29 Overall Tourist Satisfaction Indices by Destination – Retail Shops



6.6 Transportation

The transportation sector received the highest satisfaction score from the respondents visiting Hong Kong (77.8), followed by Macau (72.0) and Shenzhen received an index figure of 68.9.

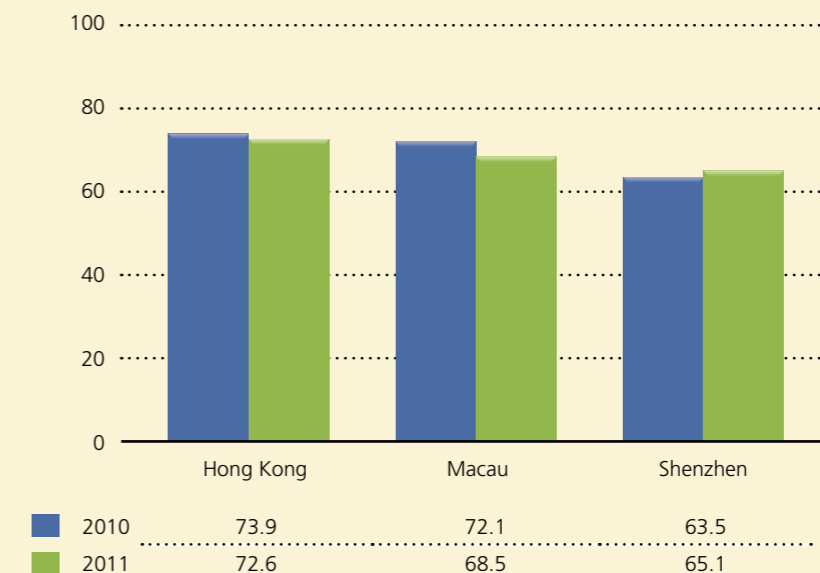
Figure 30 Overall Tourist Satisfaction Indices by Destination – Transportation



6.7 Overall Tourist Satisfaction Indices by Destination

Tourists awarded Hong Kong with an overall score of 72.6. Macau reports an aggregated overall satisfaction index score of 68.5 while Shenzhen received an overall satisfaction index figure of 65.1.

Figure 31 Overall Tourist Satisfaction Indices by Destination



7 Conclusion

The report presents the Hong Kong tourist satisfaction indices for 2011 and the results are positive. At the same time, it presents the evaluation of the competitiveness of service sectors over time and across international tourism destinations using the PolyU Tourist Satisfaction Index system. As a result, the index system can be implemented as a trustworthy gauge to monitor tourist's satisfaction annually and functions as an international benchmarking tool.

The PolyU Tourist Satisfaction Index system is a universal indicator of performance for tourism-related organizations, service sectors and that of the whole tourism industry. Furthermore, showing increased transparency and accountability, the performance measures will enable the service providers to establish a platform by which they can clearly articulate their contribution to the destination and the local community.

Despite the fact that this year reported a slight decline in the performance of some sectors, the overall result for Hong Kong remains optimistic. Moreover, Hong Kong's international position is competitive and initiatives are called for to maintain its position. Although progress takes time, measures will gradually assure improvement of the economy, society and well-being for all stakeholders concerned. Acknowledgement and encouragement is necessary and award those who take the lead in exceeding and setting new service standards.

Monitoring the performance and outcomes is essential because tourists are an important source of revenue for any destination. By establishing a measure of tourist satisfaction with reliable and valid links to strategic goals, the system may even help instill a long-term perspective in regulators, investors and other tourism stakeholders. Armed with this information, organizations that cater for tourists can identify areas for further improvement, and correspondingly, implement relevant procedures to enhance tourist satisfaction levels.

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