



JOURNAL OF TOURISM, SUSTAINABILITY AND WELL-BEING

Safety and Well-being in the Hospitality Industry

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AIMS & SCOPE

The **Journal of Tourism, Sustainability and Well-being (JTSW)** is an international open-access academic journal in the tourism field that publishes high-quality, refereed articles that advance science widely available so that tourism can serve the society, enhance a sustainable development of the destinations, and positively impact the well-being of stakeholders.

JTSW offers itself a multidisciplinary and all-inclusive bridge between theoretical and practical aspects of tourism and the emerging interdisciplinary aspects that can revolutionise the tourism and hospitality industries. While the JTSW maintains its traditional focus on original research, both conceptual and empirical, that clearly contributes to the theoretical development of the tourism field, it also has a far more inclusive and broadened scope to keep up with the new problems that challenge academics and practitioners working in private, public and non-profit organisations globally. JTSW encourages research based on a variety of methods, qualitative and/or quantitative, based on rigorous theoretical reasoning and supported by a strong methodology. Criteria for evaluation include significance in contributing new knowledge, conceptual quality, appropriate methodology, technical competence (of theoretical argument and/or data analysis), and clarity of exposition.

JTSW promotes research on a broad range of topics that explore major trends in the study of relationships between tourism, sustainable development of destinations and well-being of tourism-related stakeholders. Contributions can be from all disciplinary perspectives, with interdisciplinary approaches especially welcomed as far as they apply to the tourism research field. All policy, planning and management aspects of tourism are also encouraged.

The journal is published as a quarterly international review in open access, mainly composed of thematic special issues. The publishing schedule is the last working day of March, June, September and December. Any interested scholar can submit a proposal for the guest-edition of a special issue to the Editor-in-Chief. The proposal should follow the guidelines provided in the Guide for Guest Editors. Each article must follow the publication rules as in the Author Guidelines. The Guest-Editors and the Editor-in-Chief are responsible for the implementation of a double-blind review process. This method ensures that the author(s) and the reviewers remain anonymous to guarantee a fair and impartial review of the submitted manuscripts.

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The Editorial Board gathers world-renowned experts in different scientific areas, with a striving balance in geographic and gender diversity.

EDITORIAL

This Special Issue is dedicated to two current trends in the hospitality industry: safety and well-being. The hospitality industry is all about providing excellent service and a welcoming and safe environment for guests to enjoy. The recent pandemic has underscored the need for the hospitality industry to prioritize safety, adapt quickly to changes in demand, and have robust crisis management and contingency plans in place to ensure the health and well-being of guests and staff. These efforts are essential in creating a positive guest experience and maintaining the industry's reputation for excellence. Therefore, understanding hotel choice determinants and guest satisfaction as well as hotel staff perceptions and behavior during pandemics becomes crucial. The first three papers of this Special Issue give major contributions in this regard.

Destinations that prioritize safety can attract a wider range of visitors, promote positive word-of-mouth marketing, and foster a positive guest experience. As such, safety should be a top priority for tourism destinations seeking to thrive in an increasingly competitive global market. This may explain the current success of Portugal as a tourism destination after the pandemic.

Another current trend is that tourists are seeking experiences that promote their physical, mental, and emotional well-being. Thermal tourism is a type of wellness tourism that involves traveling to destinations that offer natural hot springs or thermal baths which are known for their therapeutic properties. The last two papers of this Special Issue give significant contributions to understanding the characteristics of demand and supply of this tourism niche.

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Reassessment of the Influence of Socio-demographic Variables on Hotel Choice during Pandemic

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ABSTRACT

The hospitality and travel sector has been one of the most affected sectors by Covid-19, which has resulted in a significant increase in the literature addressing the impact of the health crisis on tourism activities and tourists' perceptions and behaviours. Traditionally, socio-demographic variables have been instrumental in understanding consumers' needs and desires. However, during the pandemic, it has been unveiled that social and economic profiles have started to influence how tourists make decisions. Since studies on the changes in hotel choice during and after Covid-19 are still scarce, this article aims to assess the influence of socio-demographic variables on hotel choice based on data collected during the peak phase of the Covid-19 pandemic. A quantitative study was conducted using an online questionnaire that reached an international sample of 1113 individuals. The ANOVA and the t-test analysis results point out that socio-demographic variables under study are responsible for several differences in the evaluation of hotels. These findings reinforce socio-demographic attributes' capability to understand customers' preferences and decision-making despite the context.

KEYWORDS

Hotel Choice, Socio-Demographic, Safety Perception, Hotel Certification, Hotel Guests' Behaviour.

ARTICLE HISTORY

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1. Introduction

Marketing professionals use socio-demographic variables to get helpful information for understanding consumers' needs and wants and create differentiating offers for potential customers, which may vary according to age, gender, income or even nationality (Kotler et al., 2013). Socio-demographic variables are efficient indicators of behavioural intention development and a base to estimate the target market size. They are also important influencers of attitudes and purchase intention and to understand the changes in market segments to allow the creation of differentiating strategies in the hospitality sector (Lee & Hwang, 2011).

The hotel sector must innovate in management to achieve a competitive advantage. Therefore, hotel managers must consider this when formulating business policies (Mártinez-López & Vargas-Sánchez, 2013). In the past, Prideaux et al. (2003) stated, and ultimately foreseen, that one of the disasters that could affect the tourism sector would be a pandemic, perhaps caused by a new strain of influenza or another unknown disease. Their prediction became real when Covid-19 was officially considered a global pandemic on March 11, 2020, by the World Health Organization (World Health Organization, 2020). Pandemics are not new, though no previous situation reached the extent and consequences of the current one, namely on tourism. According to (Nicola et al., 2020), with the Covid-19 outbreak, the hospitality and travel sector was hit the hardest, facing potentially devastating consequences. The coronavirus pandemic has had endless global implications, leading people to believe that nothing will be the same as before.

Tourism research is currently dominated by studies that evaluate the pandemic's effects and implications and suggest measures and actions for dealing with the consequences (Sahin, 2020). Zopiatis et al. (2021) state that research has experienced a renaissance due to the pandemic, and researchers have found an opportunity to investigate the impact of the health crisis from diverse perspectives. The authors assert that in the field of tourism marketing, the topics to be addressed in the future are related to tourists' expectations, perceptions, and attitudes in the post-Covid-19 era. In the same line, (Sigala, 2020) points out topics such as tourists' decision-making and assessments of quality or satisfaction.

To face the challenges emerging from Covid-19, hotels need updated information on customers' concerns, expectations, and requirements regarding hotel services, safety warranties, and certifications. Since socio-demographic characteristics are valuable predictors of consumer behaviour (Wang et al., 2020), and there is a gap in the tourism literature regarding the influence of these variables in pandemic situations, this research aims to assess the influence of socio-demographic variables on hotel choice based on data collected during the peak of the Covid-19 pandemic to fulfil the existing gap.

2. Literature Review

Businesses must consider the best way to create value for the target markets and develop strong, profitable, and long-term relationships with their customers (Lee & Hwang, 2011). The hospitality industry should identify valuable customers and how they evaluate the options when choosing a hotel (Choorichom, 2011). However, it is challenging to attract a specific group by identifying the determinants of their preferences (Hauck William & Stanforth, 2007). The hospitality industry implements demographic profiling to enhance its knowledge or understanding of customer demographic differences concerning expectation and perception of quality of service (Tsiotsou & Vasioti, 2006).

Several studies relate socio-demographic characteristics, namely age, gender, income, education and occupation, to consumers' decision-making (Lee et al., 2012). Tefera and Migiro (2017) reveal the role of demographics in service marketing variables; however, they have been unable to find statistically significant differences in service quality scores between gender, age, marital status, and the type of employment someone has. Similarly, Cetin (2014) found that none of the demographic factor groups (age, gender, marital status, education, nationality and income) showed significant differences in hotel guests' expectation and perception levels. However, there are contradictory results. The study by Ahmad et al. (2014) indicates that age significantly explains differences in the perception of hotel service quality. Weaver et al. (1994) also agree that age is a distinctive demographic factor affecting destination choice, as younger people look for fun and cheap places while older people seek comfort and safety. They indicate that tour-

ists under 45 tend to seek new experiences. Older customers generally unveil higher purchasing power than other groups and thus are more willing to pay more for some luxury offers, especially targeted to their financial capacity (Khare, 2011). A study addressing Gen Z developed by Wiastuti and Lestari (2020) revealed that different even inside the same age generation, there are differences in hotel preferences associated with demographics. Younger Gen Z individuals, mainly in high school or studying for a bachelor's degree, considered cleanliness the most critical attribute. Conversely, for older Gen Z individuals, the top three hotel attributes are room comfort, cleanliness, value for money and price. Cleanliness was considered important for Gen Z independently of the age segment and educational level.

Rubenstein et al. (2016) found a significant relationship between gender and service quality evaluation. However, Mirzagoli and Memarian (2015) report that gender, income, employment status, occupation, education, and marital status had no impact on customer satisfaction based on the perceived service quality.

Shemwell and Cronin (1995) present empirical evidence that women and men differ in their approaches to establishing relationships with service. When applied to hotel choice and booking Karatepe and Babakus (2015) indicate that men can be expected to place greater emphasis on the rational and cognitive aspects of hotel choice. In contrast, women are more likely to make decisions based on factors that affect them personally and maximise the interpersonal aspects of the relationships, while men focus their preferences on the core service. In support of the previous indications, Wolf and Zhang (2016) show that women place more value on uncertainties, time and money constraints, and decision consequences, while men place more value on information and goals. These differences may explain male customers' preference for resorts compared to female customers (Tran et al., 2019). In the case of gender, contradictions also exist in the literature. For example, Bor et al. (2018) suggest that gender does not influence hotel choice when considering hotel attributes. On the contrary, Meyers-Levy and Sternthal (1991) indicate that women tend to be more influenced by recommendations and have higher repurchase intentions than men.

Concerning employment, Tefera and Migiro (2017) showed that there are differences in expectation and perception associated with employment status. The retired and semi-retired groups present lower mean scores for expectation and perception than the employed and self-employed groups. In opposition, Tsiotsou and Vasioti (2006) indicate that employment and family status did not affect expectation, perception and customer service satisfaction, while education and age produce significant differences in average customer satisfaction. Less educated people are less satisfied with tourism services, while more educated people are the most satisfied. In addition, young people are less satisfied than older people.

Household characteristics may also have an impact on hotel choice. According to Bor et al. (2018), marital status does not determine the choice of the hotel based on the type of facilities, hotel staff, value for money, service quality, accessibility and service delivery. Nevertheless, Aziz Yuhannis et al. (2018) manifest the wife's power as a decision-maker in the family. The wife is positioned to decide what will be best for the family, ensuring that all parties are satisfied during their stay at the destination. Even though studies have shown that children are important members of family decision-making, the mother has more influence in the final decision (Lee & Collins, 2000).

The composition of the household seems to be another relevant factor. Families with children usually have a different choice process for holidays and accommodation as children can influence the early stages of decision-making regarding the date of the holidays, choice of destination, hotel and activities to be undertaken (Gram, 2005; Bronner & de Hoog, 2008). Younger children may influence choice simply by needing childcare or parental concern about meals (Thornton et al., 1997). Plus, the greater the number of children and adolescents in the family, the greater the influence attributed to children in decisions about the types of destinations, activities to develop, and the amount of money families are willing to spend (Jenkins, 1979). Huang and Xiao (2000) suggest that income affects leisure-based tourist behaviour, especially regarding the length of holiday and accommodation services used. Since income and other factors depend on tourists' country of origin, the nationality of hotel guests must also be considered, as Maoz (2007) suggested. Cultural characteristics play an important role in shaping travellers' behaviour (Andreu et al., 2017). Therefore, it is essential to recognise the differences in the behaviour associated with nationality (Tran et al., 2019).

Addressing the perception of travel risks, Karl et al. (2020) examined the effects of demographic factors on tourists' perceived risks in destination choice. They offer an integrated perspective of travel risks and affirm that the tourist's socio-demographic profile (gender, age, educational level and household income) influences travel risk perceptions and decision-making. The results showed differences associated with gender and age, and the tourists most willing to change travel plans due to perceived risks are more likely to be women and seniors. In opposition, no statistically significant differences in educational level and household income were found.

To sum up, the available evidence points out that different genders have different perspectives on decision-making (Khare, 2011) and, consequently, the study of gender, age and other socio-demographic variables can help understand the customer's purchase intention (Chen et al., 2017). Therefore, despite the contradictions, we can conclude that consumer attitudes are associated, to some extent, with socio-demographic variables (Aluri & Palakurthi, 2011). When developing marketing campaigns, marketers must consider several aspects, especially if the product or service involves a family decision (Lee & Collins, 2000). Therefore, it is worth understanding these variables' role in hotel choice during a pandemic since there is a gap in the existing literature regarding this specific context.

3. Methods

A quantitative study was developed to provide hotels with the information needed to create or adapt their strategies to meet the several targets' anxieties and requisites due to Covid-19. An online questionnaire was developed to collect data globally.

Without specific and objective criteria to assess hotel guests' anxieties, a group of tourism experts was set up, comprising four hotel managers and the researchers who employed an adaptation of the Delphi method to define the best approach to the problem. The process started with a list of items proposed by each person individually covering seven critical categories previously agreed upon by the panel: (1) Financial risk, (2) Front desk digitalisation and automation, (3) Entertainment, (4) Front desk service, (5) Hygiene, sanitation, and cleanness, (6) Hotel characteristics and space management, and (7) Food and beverage service. The critical dimensions were defined with the help of hospitality professionals known by the researchers. A list of items organised by category was compiled and later distributed among the experts. The experts were instructed to individually evaluate each item for later discussion in online meetings. The process took about a month to complete, and after five online meetings, the consensus was reached. The final list of items comprising the 52 questions distributed by the seven dimensions is presented in the appendix.

Having chosen the items, an online questionnaire was designed to collect data on the items using five-point Likert-type scales for agreement and importance. Two questions about travel habits, one ranking question to assess respondents' priorities on specific hotel attributes, and a group of questions intended to gather demographic data were included. The questionnaire was made available in four languages (Portuguese, English, Spanish, and Indonesian) on May 14 2020. The questionnaire was disseminated using multiple channels: social media pages and groups, mailing lists, and personal contacts. The questionnaire remained active until the end of May 2020. A total of 1116 responses were collected worldwide using a non-probabilistic convenience sample procedure. Three responses had to be deleted due to inconsistencies, reducing the final sample to 1113 responses distributed as shown in Figure 1. Data analysis included descriptive statistics, t-test for independent samples and ANOVA with post hoc tests. These statistical methods have been extensively used in hospitality research (Rivera Manuel & Pizam, 2015). Microsoft Power BI and SPSS 26 software were used to produce the results.

Figure 1. Distribution of the Respondents

Source: Own Elaboration

4. Results

4.1 Sample Profile

The final sample includes 728 (65.4%) females and 385 (34.6%) males. The respondents were grouped according to age under 25 (29%), 26-40 (30.4%), 41-50 (21.4%), 51-65 (19.2%). Concerning occupation, the most represented categories are Full-time employees in the Private Sector (24.1%), Full-time employees in the Public Sector (19.4%), and Students (23.5%), in total accounting for 66.9% of responses. A significant percentage of the respondents hold a bachelor's degree (42.7%), and 21% have completed a master's degree. The complete information on sample characteristics is presented in Table 1.

Table 1. Characteristics of Respondents (N=1113)

	N	%		N	%
Gender			Marriage Status		
Female	728	65,4	Single (never married)	503	45.2
Male	385	34,6	Married or cohabitating	487	43.8
Age			Separated	17	1.5
18-25	323	29.0	Divorced	66	5.9
26-40	338	30.4	Widowed	10	0.9
41-50	238	21.4	Rather not say	30	2.7
51-65	214	19.2	Occupation		
Education			Unemployed	85	7.6
Basic Education	8	0.7	Full-time Employee in the Private Sector	268	24.1
High School	87	7.8	Full-time Employee in the Public Sector	216	19.4
Professional Degree	131	11.8	Part-time employee in the Private Sector	42	3.8
Bachelor's Degree	475	42.7	Part-time employee in the Public Sector	26	2.3
Master's Degree	234	21.0	Entrepreneur	73	6.6
Doctoral Degree	156	14.0	Liberal professional	65	5.8
Other	22	2.0	Unpaid family worker	21	1.9
			Student	261	23.5
			Retired or pre-retired	32	2.9
			Trainee/Scholarship	14	1.3
			Unable to work	10	0.9

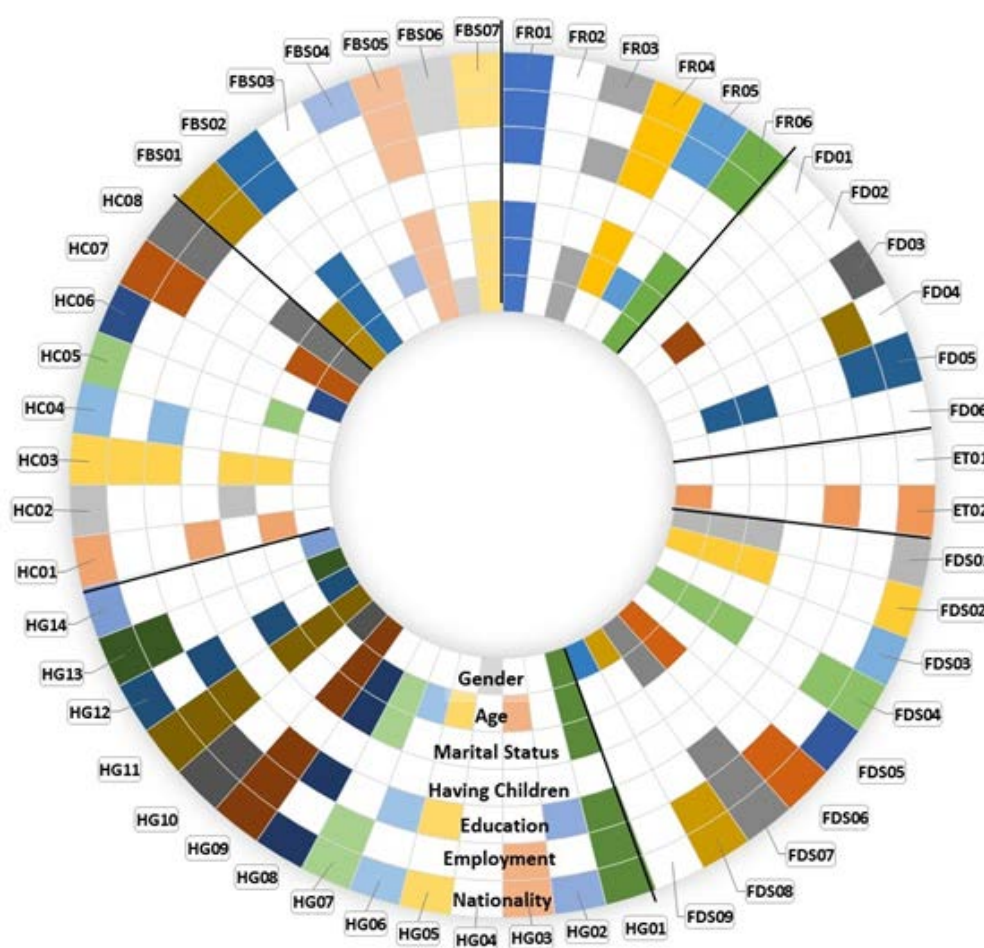
Source: Own Elaboration

4.2 Impact of Demographics on the Evaluation of Hotels

Based on the seven critical dimensions for hotel safety evaluation, the t-test for independent samples was computed to assess the difference between means by gender. Several One-Way ANOVA analyses were conducted using age category, marital status, having children, education level, employment status, and nationality as factors. In the case of nationality, only the countries with more than 50 responses (namely Portugal, Spain, México, Indonesia, and Brazil) were considered.

The results are graphically shown in Figure 2. Each ring represents a demographic attribute, and each slice corresponds to a single item (hotel safety variable) in a specific critical dimension. Coloured cells indicate statistically significant differences at a 0.05 significance level in the variable associated with specific levels of the corresponding demographic attribute. Due to space limitations, detailed One-Way ANOVA and *t*-test tables are not reproduced but are available from the authors on request.

Figure 2. Differences in Customers' Perception by Socio-demographic Variables



Source: Own Elaboration

The analysis of Figure 2 indicates that nationality is responsible for the highest number of differences (43) among the hotel safety variables under study. Regarding the other demographic attributes, age accounts for 30 differences, gender for 27, employment status for 25, marital status for 19, education for 16, and finally, having children for one single difference.

5. Discussion

The results show that all the socio-demographic variables under study are responsible for differences in the evaluation of hotel characteristics, even though to different degrees. These findings somehow explain

the contradictions in the literature regarding the impact of socio-demographic variables on hotel choice. Hospitality services are a complex product with several dimensions. Therefore, depending on the evaluated dimensions, different socio-demographic characteristics may be significant or irrelevant in explaining hotel guests' decision-making.

Five variables (FR01, HG01, HG09, HG11, and FBS05) appear to be more contingent on the socio-demographic profile of hotel guests since they are affected by all the demographic attributes under study except for "having children". In opposition, the evaluation of hotel variables FD01, FD06, ET01, and FBS03 are not affected by the socio-demographic profile of respondents.

Contrary to what was expected (e.g. (Gram, 2005; Bronner & de Hoog, 2008) (Thornton et al., 1997)), the current findings indicate that having children does not seem to be a determinant criterium for hotel evaluation. This factor only influences the variable HC01 (Staying in a hotel with a small number of rooms is safer), which is considered safer by parents with children aged between 4 and 11 years old. Front desk digitalisation and automation are the dimensions where fewer differences were recorded, as only nationality, employment, marital status, and age impact this dimension. Curiously, young clients (18-25, $M=3.05$ > 26-40, $M=2.74$) students and single seem to be the ones considering that technologies that minimise direct contact will decrease the trust (FD05). Indonesian and Mexican also think that digitalisation will decrease trust.

The preference for hotels providing personalised counselling for choosing experiences at the destination (ET01) is slightly positive ($M=3.64$) and does differ according to demographic attributes. In turn, the preference for hotels with entertainment in open spaces is more important for women ($M=3.89$), Portuguese ($M=3.94$) and Spanish ($M=4.11$) clients, therefore supporting the indication of the impact of gender (e.g., (Kotler et al., 2013); Rubenstein et al. (2016)). The level of education also affects this variable, suggesting that highly educated clients tend to favour events' safety (Lee et al., 2012). In the case of front desk service, the level of education influences the existence of differentiated entrances and exits (FDS07), with a bachelor's ($M=3.65$) given more importance than clients holding a master's degree ($M=3.32$). However, this is the only difference in the front desk service dimension. Nationality has a considerable influence in this dimension since only the desire to be informed daily of the occupation rate, clients with Covid-19 and hygiene and disinfection practices (FDS09) ($M=3.92$) do not vary across nationalities, supporting the importance of nationality to explain hotel choice ((Andreu et al., 2017); (Tran et al., 2019)). Therefore, hotel managers should adapt the service according to hotel guests' origin (Nationality).

Gender also significantly affects the perception of front desk service, with women showing particular concern and importance to the safety of the front desk to men. Compared to older clients, younger clients feel more uncomfortable and upset with preventive safety measures at the front desk (FDS02, FDS04), but what to enjoy the benefits associated with protective measures (FDS06, FDS07). These findings reinforce previous indications by Ahmad et al. (2014) and Weaver et al. (1994) about age's influence on hotel choice behaviour.

Hygiene, sanitation, and cleanness are the more extensive category with 14 items. In this category, it stands out the scepticism of hotel clients regarding the effectiveness of the Covid-19 safety certificate (HG03) and the high level of difference in hotel guests' opinions associated with different levels or categories of the socio-demographic variables.

6. Conclusions and Implications

The world has gone through unprecedented times and challenges, and the COVID-19 outbreak has changed the world, notably the tourism sector. Among the lessons learnt from the pandemic is that tourism will change in the future according to the socio-demographic characteristics of tourists, namely in terms of how they start to favour some hotel profiles. This will have a major impact on the hotels' operations. Tourists will start to choose some particular destinations and then push development to some destinations, namely those located in low-density areas.

The current study was developed in the context of the Covid-19 pandemic and aims to shed light on how socio-demographic variables can impact hotel choice. The novelty of the current setting made it very difficult to find studies explicitly addressing the issues of hotel guests' perception of safety and

health risks, mainly at times of crisis. The literature review revealed the scarcity of articles focusing on non-conventional contexts. Therefore, the current findings expand the existing knowledge on the impact of socio-demographic characteristics on hotel choice in a non-normal, pandemic context regarding a set of indicators related to perceived risks and safety measurements. The results help identify the socio-demographic variables responsible for differences in the evaluation of hotel characteristics during the pandemic and the magnitude of their impact. In addition, as tourism is an important industry worldwide due to its role as a source of income and socio-cultural benefits, this study offers geographically global insights capable of being considered and applied anywhere in the world.

Concerning practical implications, hotel managers benefit from having specific information about tourists' criteria for hotel choice in the post-pandemic context to support the sector's recovery. These findings reinforce the capability of socio-demographic attributes to understand customers' decisions despite the context. In the case of Covid-19, since the assessment of hotels varies according to the demographic profile of guests, hotel managers need to be aware of differences to develop solutions better tailored to each segment. This conclusion is in line with Karl et al. (2020). They assert that tourism destination managers can use the results of this type of study to identify the variables depicting potential risk-averse or risk-seeking tourists. With this knowledge, marketers can develop multifaceted marketing activities and communications plans to promote destinations among the right segments of tourists. A better knowledge of the socio-demographic variables associated with the demands and behaviours of the different segments will improve the hotel experience.

Regarding limitations, as it was globally distributed, the global coverage of the sample can be considered a strength; however, the sample size by continent and country is not homogeneous. This could introduce a sample bias to the extent that there are countries or continents more and less represented, which could lead to cultural bias, which is a limitation when assessing the results. A non-probabilistic convenience sampling method was used to collect data, limiting the generalisation of the findings.

Concerning the future research lines, studies on the impacts of Covid-19 in the travel industry should continue to offer strategic tools for helping the sector recover. The marketing strategy base is knowing the tourists' needs and desires. Thus, in this new context triggered by the health crisis, examining the impact of other variables, such as those related to lifestyle, would be appropriate. Research may also focus on the role of socio-demographic variables as moderators in analysing the relationships between other variables involved in hotel choice and behavioural intentions. Studies with international samples are needed to identify the power of cultural differences in a detailed cross-cultural analysis, considering that in this study, nationality is responsible for the highest number of differences among the hotel safety variables under study.

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APPENDIX

Indicator Description

Financial risk

- | | |
|------|--|
| FR01 | I only book if I am assured that I can change the reservation at any time |
| FR02 | I do not mind paying extra for pandemic insurance when I am booking. |
| FR03 | I attach more importance to ensuring Covid-19's prevention conditions than to the price |
| FR04 | For me, it is very important that hotels offer free health and personal accident insurance |
| FR05 | I would give preference to hotels that allow the extension of the stay at reduced prices if it is impossible to continue the trip. |
| FR06 | A higher price corresponds to higher health quality |

Front desk automation

- | | |
|------|--|
| FD01 | New technological ways of customer service will negatively affect service personalisation |
| FD02 | New technological ways of customer service can positively increase service satisfaction |
| FD03 | Being attended by digital assistants will compromise my satisfaction with the service |
| FD04 | I only choose hotels with qualified staff capable of responding to situations of anxiety in case of crisis |
| FD05 | Technologies that minimise direct contact will decrease the trust |
| FD06 | Digital technologies in hotels will prevent the creation of empathy with the client |

Entertainment

- | | |
|------|---|
| ET01 | I prefer hotels that offer personalised counselling in choice of experiences at the destination |
| ET02 | I prefer hotels with entertainment in open spaces, without agglomerations |

Front desk safety

- | | |
|-------|--|
| FDS01 | At the reception, it is important to ensure health safety conditions |
| FDS02 | The temperature measurement at the time of arrival will make me feel uncomfortable |
| FDS03 | I prefer to have a personalised service to minimise the risk of contagion from Covid-19 |
| FDS04 | I get upset if attended by employees with mask/visor and gloves |
| FDS05 | The digitisation of the hotel service is vital to ensure the customer's confidence regarding Covid-19 |
| FDS06 | Be able to check-in and out by appointment |
| FDS07 | Having differentiated entrances and exits for customers |
| FDS08 | Being serviced by appropriately uniformed employees with mask/visor and gloves |
| FDS09 | Be informed daily of the occupation rate, clients with Covid-19 and hygiene and disinfection practices |

Indicator	Description
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Hygiene, sanitation and cleanness	
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HG01	Hotels should only reopen if they meet all hygienic conditions to avoid contamination
HG02	I trust hotel safety against the risk of contagion
HG03	The Covid-19 certification ensures that there is no risk of contagion.
HG04	Health entity certifications reinforce the degree of trust when selecting the hotel
HG05	In hotels, there are always risks resulting from deficiencies in the hygiene of the rooms
HG06	In hotel stays, there is always a health risk associated with the poor hygiene of the common and service areas
HG07	Hotel chains have stricter health safety policies
HG08	Hotel chains have a greater ability to react to dangerous situations such as pandemics
HG09	Hotels adopt a responsible behaviour towards the risk of contagion
HG10	Hotels periodically close for general sanitisation and disinfection
HG11	The Safety and health practices in hotel choice
HG12	Promote Online Check-In and Check-out to avoid agglomeration
HG13	Offer masks, disinfectant gel and gloves in rooms
HG14	Favouring hotels that have special agreements with local healthcare units

Hotel characteristics, space management	
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HC01	Staying in a hotel with a small number of rooms is safer
HC02	Rural accommodations and isolated units will be preferred over large hotels
HC03	I prefer a large hotel
HC04	I prefer a higher-class hotel
HC05	It bothers me that some services are not available to minimise the risk of contagion.
HC06	Hotels have the infrastructure to ensure physical and psychological comfort in case of quarantine
HC07	Hotels ensure safety distance in common spaces
HC08	Hotels with a limited number of clients in common spaces

Food and beverage services	
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FBS01	Because of the pandemic, I have become more sensitive to food security issues
FBS02	The meals should not be served in a buffet
FBS03	I feel more confident in hotels that have kitchen/kitchen where I can prepare/take meals
FBS04	Because of the Covid-19, the room service is safer.
FBS05	Meals being served in reduced capacity locations
FBS06	The meals being served by appointment
FBS07	Having an option for take-away meals provided by the Hotel kitchen

What Changes in Restaurant Satisfaction during Covid-19? An Overview Based on Online Reviews

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ABSTRACT

Lately, online users have become avid content creators and consumers of brands and firms through reviews. These serve as sources to peers and reflect reviewers' satisfaction levels with different elements of the experiences. Thus, online reviews are considered reliable sources of information to understand customers' perceptions. Using hybrid methodologies and text-mining techniques is recommended to obtain useful knowledge based on user-generated data. This study intended to understand customers' perceptions of restaurant service and unveil any change that might occur driven by the COVID-19 pandemic. Therefore data was collected on TripAdvisor for two different periods - before and after the pandemic, using the top restaurants of two island tourism destinations. An upturn in customer satisfaction during Covid-19 and changes in attribute weight in the overall evaluation was observed. Therefore, the attribute "service" acquires even more special relevance. This methodology is considered adequate to meet the objectives defined, allowing to obtain relevant conclusions; it might also be applied to other phenomena and sectors.

KEYWORDS

Customer Satisfaction, Online Reviews, Pandemic, Restaurants, Quality of Service, Tripadvisor.

ARTICLE HISTORY

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1. Introduction

The COVID-19 pandemic affected all sectors of activity and the population's daily life globally. To contain the spread of the virus, the authorities of various countries have been applying measures that have been reflected more intensively in specific industries, with tourism and specifically the restaurant sector having felt the most impact. This situation has forced establishments in general, and restaurants in particular, to restructure and adapt strongly to comply with the defined rules.

As a result, consumers have also faced an inevitable need to adapt the way they use these services. This phenomenon will have intensified the importance of business managers in the restaurant area to understand the perception of their customers about the service provided since the crisis experienced by the sector has accentuated the need to maximize satisfaction and loyalty (Hakim, Zanetta, & Cunha, 2021; Madeira, Palrão, & Mendes, 2021).

The Internet and social media platforms have been strongly changing how people search and share information; multiple platforms where users register their opinions have been given the power to produce content between businesses and their consumers. Consequently, consumers heavily rely upon these new sources of information, especially regarding choices related to the tourism sector (Borges-Tiago, Arruda, Tiago, & Rita, 2021).

Online reviews thus also emerge as a rich, reliable, and accessible source from which managers can draw to learn more about the expectations, experiences, and even trends of consumer preferences for these services (Amaral, Tiago, Tiago, & Kavoura, 2015). This premise is reinforced by the fact that destinations seek to distinguish themselves through the so-called tourism intelligence, which motivates a better understanding of visitors' expectations and experience, strongly supported by the large amounts of user-generated data (Gretzel, Sigala, Xiang, & Koo, 2015; Ye, Ye, & Law, 2020). Moreover, since restaurants represent a particularly crucial sector in the economy and the identity of the regions, it is urgent to take advantage of the data produced by users and convert it into valuable knowledge for decision-making.

Two fundamental components compose online reviews: scores, which enable quantitative statistical analyses, and written comments, which allow qualitative analyses. The importance of integrating quantitative and qualitative methods supported in these elements is identified, originating hybrid approaches, particularly relevant when the purpose is to understand social phenomena. Furthermore, the emergence of CAQDAS software has enabled simultaneous quantitative and qualitative analyses (Amaral et al., 2015). In this sense, text mining techniques and sentiment analysis are proposed, possibly due to the evolution of machine learning technologies and natural language processing associated with the processing of databases on a large scale (Gan, Ferns, Yu, & Jin, 2017). This can be done in two ways regarding the classification of sentiments: through machine learning or lexical-based approaches, proposing the collection of helpful information from unstructured text data of customer reviews (Calheiros, Moro, & Rita, 2017).

Therefore, this study using these information resources and techniques intended to unveil the most valuable attributes linked to customer satisfaction expressed in reviews before and after the pandemic and consequently highlighted the "new" features that need to be taken into account by restaurant managers.

2. Literature Review

2.1 Quality of Service in Restaurants

Services have unique particularities that influence consumers' behaviour as to how they obtain information about them, being more challenging to make comparisons that facilitate their decision-making (Gabbott & Hogg, 1994). The risk factor has a more significant role in conditioning the decision to be taken; the risks perceived by the consumer may be functional, financial, temporal, physical, psychological, social, or sensory (Kotler & Keller, 2006).

Various phenomena explain the choices made by consumers, being the phenomenon of aversion to extremes is relevant in this regard. The phenomenon of hatred to extremes and the effect of compromise are the tendency of consumers to avoid extreme choices by selecting intermediate options when present-

ed to them. Personal characteristics can influence the intensity of this trend, the context of consumers, and other situational factors, which occur mainly in travel-related choices (J. Kim et al., 2021). As with the entire tourism sector, consumers of restaurant experiences are increasingly demanding and study the destinations and services offered before visiting them (Madeira et al., 2021).

Andaleeb and Conway (2006) highlight the importance of the quality-of-service theme, recovering the Servqual model developed in 1988, which is still used today. Servqual is a generic model for measuring the quality of service, originally designed based on several questions posed to executives of companies in specific sectors and another series of questions addressed to customers of these companies (Parasuraman, Zeithaml, & Berry, 1988). According to Servqual, the perceived quality of service results from the consumer's appreciation, resulting from a comparison of expectations with the performance perceptions, based on several items grouped into five dimensions: "tangibility", "reliability", "availability", "security" and "empathy".

Despite the importance of Servqual, and although it was also applied to restaurants (Andaleeb & Conway, 2006), the model was adapted in 1995 to suit this sector better, giving rise to the Dineserv model (Stevens, Knutson, & Patton, 1995). The Dineserv model is considered particularly useful in assessing customers' perception of the quality of service of restaurants (Marković, Raspor, & Šegarić, 2010).

Kim, Ng and Kim (2009) developed a study to investigate the relative importance of these five factors that make up the Institutional Dineserv model as to their influence on consumer satisfaction and, consequently, in the intention to return and to recommend a particular restaurant. Through an online questionnaire applied to university students, the authors obtained results that allowed them to conclude that all the attributes included in the model have a significant positive effect on the variables mentioned (W. G. Kim et al., 2009).

Gan et al. (2017) developed a study aimed at understanding the structure of online customer reviews and the attributes that have the most influence on the rating they assign to restaurants. The authors accept the main attributes suggested by previous studies, namely "food", "service", "environment", and "price". However, through the work of these authors, in which techniques of text mining and sentiment analysis were applied to registered reviews, the importance of the attribute "context" was also identified. The results suggest that this is the third determining factor for customers' evaluation of their experience (Gan et al., 2017).

Tian, Lu and McIntosh (2021) developed a study to understand the factors that most affect restaurant customers' sentiments and evaluations, analyzing their online reviews. The authors concluded that the clients use more positive than negative words in their comments and that there is a positive relationship between the proportion of sentiments identified and the classification attributed. Through this analysis, the authors explain that customers reveal more sentiments (positive or negative) when referring to the "service" and less when referring to other aspects. It was also found that customers evaluate "service" better than "food" (Tian et al., 2021).

2.2 Online Reviews on Restaurants

Technologies associated with web 2.0 have changed the way users search and share information through new forms of communication – efficient, instant and without any geographical barriers (Pacheco, 2018).

From a cost-effective perspective, social media platforms will be one of the most advantageous ways to improve the quality of services since they allow to dispense with other marketing costs associated with more traditional methods to understand customers' opinion. Pacheco (2018) explains the strong influence that the so-called e-word-of-mouth has on the tourism, hospitality and similar sectors, as online reviews are particularly relevant in services that are characterized by being more intangible, as is the case with the experiences provided by these sectors, where quality can only be perceived through actual consumption.

Unlike tangible products, which do not change unless new versions or models are available, a meal in a restaurant is a product whose quality and delivery are influenced by numerous variables that may change at any time. In this sense, an exceptional need to ensure updated reviews is justified in these cases (Pacheco, 2018). It is known that a customer who has a good experience in a restaurant tends to visit it again and recommend it. On the other hand, if customers have a bad experience, they will share it with friends, recommending that they do not visit the restaurant (Tiago, Amaral, & Tiago, 2015).

Tripadvisor, Booking and Airbnb websites are examples of platforms that aggregate content about tourism-related sectors, the first of which also applies to restaurants and stands out for the high amount of traffic it receives (Amaral et al., 2015) being widely used by consumers to register their ratings (Laksono, Sungkono, Sarno, & Wahyuni, 2019).

Tourism managers need to gain more knowledge about the behaviour of tourists to support their strategic planning and decision-making. However, their knowledge of the preferences and opinions of different tourist groups is still limited (Vu, Li, Law, & Zhang, 2019). The growth of travel and tourism-oriented online applications has contributed to the emergence of new business opportunities and challenges. Customers tend to do prior research on the internet about destinations to make their decisions. In this sense, the reviews they find online have become a primary source of information to support their choices about where to go and where to stay (Calheiros et al., 2017).

Restaurant managers should use customer reviews to understand their experiences and reactions and provide feedback, especially to the most dissatisfied. A regular visit to platforms such as Tripadvisor is specifically recommended to learn about industry trends from customers' point of view. Customer-generated reviews and content can help businesses improve the quality of their service, which will translate into better future reviews, greater visibility and, consequently, more revenue (Pacheco, 2018).

The new platforms for communication and sharing between online communities are proving to be of great importance for the tourism industry, as they are authentic data resources provided directly by users. Businesses, however, face the challenge of managing these highly dynamic elements and constantly monitoring user-generated content and its influence on the image of their brands (Borges-Tiago et al., 2021).

User-generated content on various websites has enormous potential, suggesting data mining techniques to produce useful and valuable knowledge about business performance, specifically regarding restaurants (Bilgihan, Seo, & Choi, 2018). Text mining is a relevant technique in this matter, being a specific type of data mining consisting of an analysis of the textual contents attempting to reveal hidden patterns that can be translated into useful knowledge. In addition, through the analysis and classification of sentiments, business managers will be able to understand which categories of services influence most customer satisfaction, which is important to help define Customer Relationship Management (CRM) strategies (Calheiros et al., 2017).

Information and Communication Technologies (ICT) have fostered the emergence and growth of new tools and opportunities for the tourism industry (Buhalis & Amaranggana, 2013; Ye et al., 2020). These technologies can add value to tourists' experiences, promoting increased efficiency and automating processes in tourism-related sectors. By adequately incorporating ICT into their environments, tourism destinations can enrich the tourist experience and improve their competitiveness.

Buhalis and Amaranggana (2013) explain that the sector's activities related to tourism generate vast amounts of digital data, contributing in a large scale to the production of the so-called big data. By acquiring the capacity to manage this data, tourism-related organizations can extract valuable knowledge that could raise them to a higher level in the consumer experience, gaining a competitive advantage over their competitors.

In this context, Smart Tourism Destinations emerge with the purpose of improving the tourism experience through smart systems that combine ITC, local cultures, and innovation in the tourism industry to promote the quality of service, improve tourism management, and amplify the scale of the industry (Buhalis & Amaranggana, 2013).

2.3 The impact of COVID-19 on Restaurants

The COVID-19 pandemic has brutal consequences on economic activity, and it is impossible to estimate its real impact since it will depend on determinant variables whose evolution is still unpredictable. It is known, however, that there has been an immediate impact on the revenues of companies from various industries, with the sectors associated with hospitality and the like being among the most affected, given their dependence on the mobility of people, which has been severely limited, with a drastic reduction in travel (Byrd et al., 2021; Hakim et al., 2021; Song, Yeon, & Lee, 2021).

Restaurants, already characterized as high-risk businesses, saw this risk dramatically exacerbated in the pandemic context. The restaurant sector was progressively affected as the pandemic evolved, with a strong impact on sales volume, employee lay-offs, and reduced hours worked as early as March 2020, noting the trend to close many businesses due to the pandemic (Song et al., 2021).

Usually, there is a natural solid motivation for people to interact socially and physically. However, historically pandemics generate an increase in fear about others, which results from the high perception of threat. In these contexts, people tend to have subjective perceptions of the threat of disease, having difficulty maintaining an objective point of view about the phenomenon surrounding them (J. Kim & Lee, 2020). In addition, there is evidence that customers mistakenly perceive restaurant food and its packaging as sources of COVID-19 contagion (Byrd et al., 2021). These insights contributed to customers' reluctance to go to restaurants, significantly impacting the activity (Al-Marzouqi & Yahia, 2021).

A study aimed at assessing the first impacts of the COVID-19 pandemic on restaurant demand found that, with each 1% increase in the number of new cases per day, visits to restaurants decreased by 0,0556%. There was also a negative relationship between the number of orders to eat at home and the number of restaurant visits (Yang, Liu, & Chen, 2020).

Through a survey applied to tourism destination residents, aiming to unveil the impact of the pandemic on tourism expectations, it was found that the factor "cleanliness and security" was the most decisive when choosing where to eat and stay in the near future. In addition, a significant proportion of the study participants indicated they were willing to pay a higher price for services that would provide a higher security guarantee (Couto et al., 2020).

The prominence of the virus and perceived threat by consumers increased the preference for isolated tables and private spaces in restaurants. In addition, customers will be more interested in places that perceive greater preparation and exhibit it, like those certified as "Clean and safe" (Borges-Tiago et al., 2021). This preference reflects that people seek solutions involving less risk (J. Kim & Lee, 2020).

In a study to investigate the influence of the intensity of health measures on consumers' behaviour in relation to restaurants, it was concluded that, although the perceived risk concerning COVID-19 may negatively impact the perception of quality, the application of health measures tends to reduce this effect. The authors also suggest that "hygiene" is a determining factor in customers' expectations (Al-Marzouqi & Yahia, 2021).

Many *chefs* and entrepreneurs demonstrated their concern about the reopening of restaurants as they estimated a possible lack of customers, which they associated with probable initial anxiety that they would have when visiting restaurants in the context of a pandemic (Madeira et al., 2021). However, as the restaurants resumed activity, the demand from customers was high, showing their interest in attending restaurants during the pandemic (Hakim et al., 2021). Hakim et al. (2021) have stressed the need to understand the factors that motivate consumers to visit restaurants during a pandemic. The pandemic is expected to continue to affect directly and indirectly the restaurant sector for a long time.

The perception and importance of the COVID-19 threat are factors that amplify the general trend of selecting commitment options and avoiding extreme choices. Thus, consumers tend to make intermediate choices when presented with a number of options (J. Kim et al., 2021).

In order to recover during and after the pandemic, businesses should have adaptive strategies based on a better understanding of how consumers react to threats since, thanks to digital platforms, consumers can easily compare the price and attributes of the options at their disposal. Therefore, it is critical that businesses pay attention to how they position themselves on these platforms in the face of competition and strive to adapt their offer, seeking to satisfy consumers' greater need for security (Kim et al., 2021).

Therefore, restaurant clients' behaviour is not a simple matter. It includes an ever-evolving set of influences that need to be considered when planning the restaurant activity and trying to minimize the perceived risks and increase overall satisfaction. In light of these concerns, this research focuses on answering these questions:

1. What are the most prevalent factors affecting consumers' experience in restaurants?
2. Does clients' online discourse present significant differences before and during a pandemic?
3. To what extent do the destinations' characteristics and public policies mould consumer perceptions and preferences?

3. Methodology

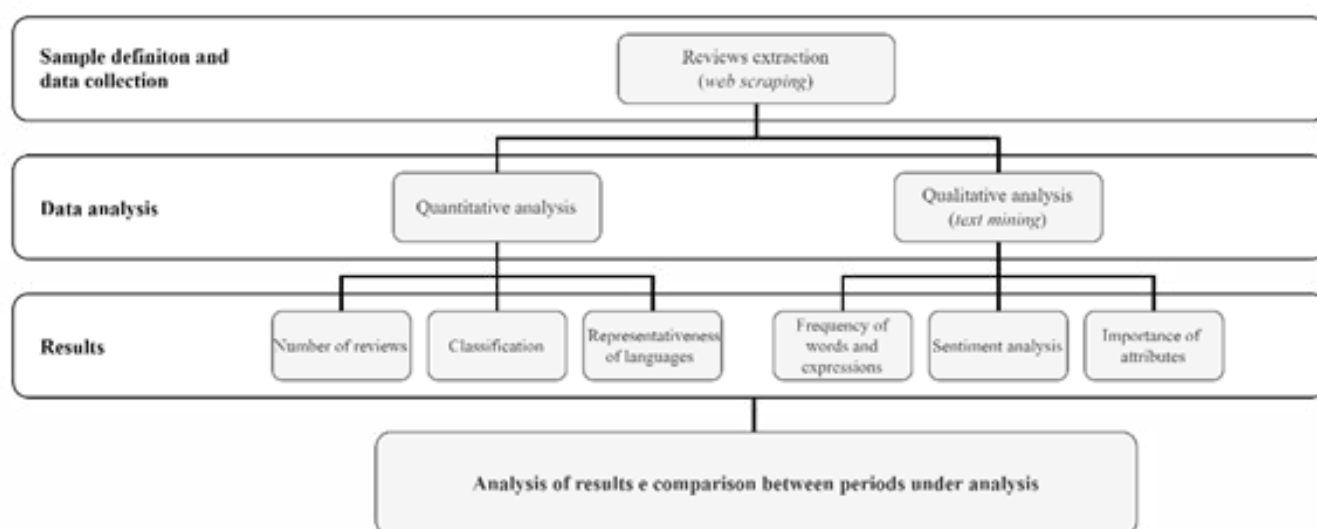
A hybrid analysis was carried out to answer these questions based on qualitative and quantitative elements. This analysis was supported by online reviews registered by restaurant customers on the TripAdvisor platform to understand their perception of the service provided, especially seeking to produce and interpret results through non-standard textual content.

Two distinct periods of analysis were defined, one prior to and the other subsequent to the outbreak of the pandemic, namely the second half of 2019 and the second half of 2020. For this purpose, two urban locations of high tourist affluence were selected in different Portuguese islands and outermost regions: the city of Ponta Delgada on the island of São Miguel and the city of Funchal on the island of Madeira. It was also necessary to define and apply additional criteria to select a limited number of establishments from each town to be considered in the sample. The criteria adopted considered the top 10 restaurants present in the TripAdvisor ranking. Also, it was defined as the eligibility criterion for restaurants that had reviews registered in both periods, which led to the exclusion of two establishments. Given their greater representativeness, only comments in English and Portuguese were considered.

These two islands belong to the two autonomous regions of Portugal, and during the pandemic, they adopted different sanitary measures to contain the virus's spread. Madeira closed to tourism later than the Azores, having confinement and testing policies established from the beginning. Both destinations created and applied a "safe & secure" accreditation to ensure that firms operated according to the sanitary guidelines and that customers felt safe. These were chosen due to their different tourism maturity level. In contrast, Madeira has more than a hundred years as a tourism destination, and most population works in the tourism and hospitality industry. The Azores have been fully committed to tourism for the last two decades. Thus, the economic impact of the lockdown and tourism constraints affected the two regions differently, with Madeira facing more pressure to reopen all activities.

The data were collected using web scraping tools, and its processing was done using text mining tools by applying machine learning technology and categorizing and classifying content based on the lexicon, that is, with the application of dictionaries that would enable this categorization, namely through the Wordstat software. Figure 1 summarizes the main steps of the methodology employed in this research.

Figure 1. Main Steps of the Methodology Employed



Source: Own Elaboration

As for the qualitative analysis, the textual content processing performed in Wordstat software was divided into two steps.

3.1 Step 1

In the first step, a content analysis was initially performed, executing the “Analyze” function of Wordstat, selecting the option “Explore” with the English language application and without recourse to any specific lexical dictionary. Then, through the “Frequencies” function, the frequency of words was obtained in the first and second periods under analysis.

Through the “Phrases” function, configuring the minimum and the maximum number of words to be considered in the extraction, 20 phrases were obtained with 2 to 5 most frequent words in the first and second periods under analysis. In addition, the 20 phrases with 3 to 6 most frequent words in the first and second periods under study were also obtained using the same function.

Applying the “Topics” function, the 15 main topics identified in the reviews were extracted, resulting from the application of factor analysis, with segmentation per sentence and considering the highest level of confidence in the enrichment of the topics. These topics were ordered according to their eigenvalue to assess their relevance to the total number of reviews registered.

Then, to relate these topics with the theoretical attributes associated with the quality of service in restaurants, a replacement of the themes generated through Wordstat was made by the characteristics considered more compatible with them, based on the attributes synthesized in Table 1.

Table 1. Summary of the Attributes Considered for Association with the Themes Identified in the Reviews

Model	Proposed Attributes
Institutional Dineserv (validated by W. G. Kim et al., 2009)	Food quality; Service quality; Price and value; Atmosphere; Convenience
Proposed by Gan et al. (2017)	Food; Service; Context; Price; Environment

Source: Own Elaboration

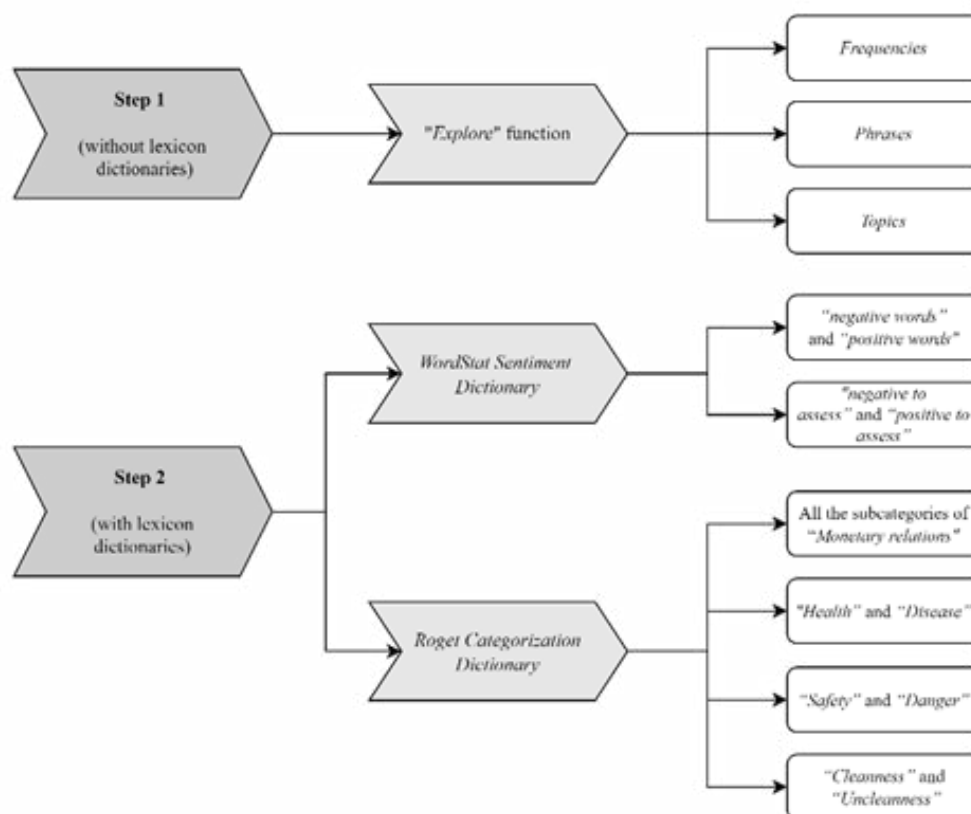
It was sought, whenever possible, to apply the attributes referred to by Gan et al. (2017). However, when this was not possible, the attributes foreseen in the Institutional Dineserv model validated by W. G. Kim et al. (2009), including the attribute “convenience”, were used.

3.2 Step 2

In the second stage, a more specialized analysis was carried out using the “Run Expert Mode” option that enables the application of dictionaries to categorize the analyzed contents. This second strand of data analysis in Wordstat was subdivided into two phases, using different dictionaries: first, the “Wordstat Sentiment Dictionary” and later, the “Roget Categorization Dictionary”.

First, “Wordstat Sentiment Dictionary” was applied to analyze the main sentiments identified in the texts. In this case, the following sets of categories were used separately: the categories “negative words” and “positive words” and the categories “negative to assess” and “positive to assess”.

It was then applied to the “Roget Categorization Dictionary” to investigate specific attributes that could help understand the phenomenon under analysis. Once clues about the “price” attribute relevance emerged, a dictionary that would allow assessing the importance of this factor in each of the periods under analysis was adopted. It also sought to identify specific references in the health, safety, and hygiene reviews. Figure 2 systematizes the two main steps of processing the textual contents in Wordstat and the data obtained through each procedure.

Figure 2. Main Steps Performed in WordStat and Results Obtained

Source: Own Elaboration

4. Results

4.1 Quantitative Analysis

Of the 18 establishments evaluated, 14 saw the number of reviews decreases in the second half of 2020. Thus, only four of these 18 establishments saw the number of reviews increases in the second analysis period. In the total of restaurants selected in both locations, there are 831 reviews referring to the first period under analysis and a total of 400 reviews referring to the second period under investigation, which corresponds to a decrease of 51,87%. There was a significant increase in the review number registered in Portuguese and a reduction in the number of comments made in English in both locations.

Of the 18 restaurants under review, 11 saw their average ratings rise in the second review period. Only six restaurants saw their average rating drop, while one restaurant maintained its average rating. The average rating of all reviews for the second half of 2019 was 4,82, while the average rating for the second half of 2020 was 4,87. Therefore, there was an increase of 1,04% in the average classification of reviews between periods under analysis.

4.2 Qualitative Analysis

The most mentioned word was "food" in both periods under analysis. However, the word "service" went from the fifth most mentioned word in the first period under analysis to the second in the second period under analysis. Also, the words "recommend" and "experience" were shown more frequently. In both periods, the most reported expressions were "great food" and "Indian food". However, the third of the most mentioned expressions in the first half of 2019 was occupied by the expression "excellent food", being occupied by the expression "great service" which rose five places in the second period. Also, the phrases "highly recommend" and "food and service" rose in position. While in the first period under analysis, the

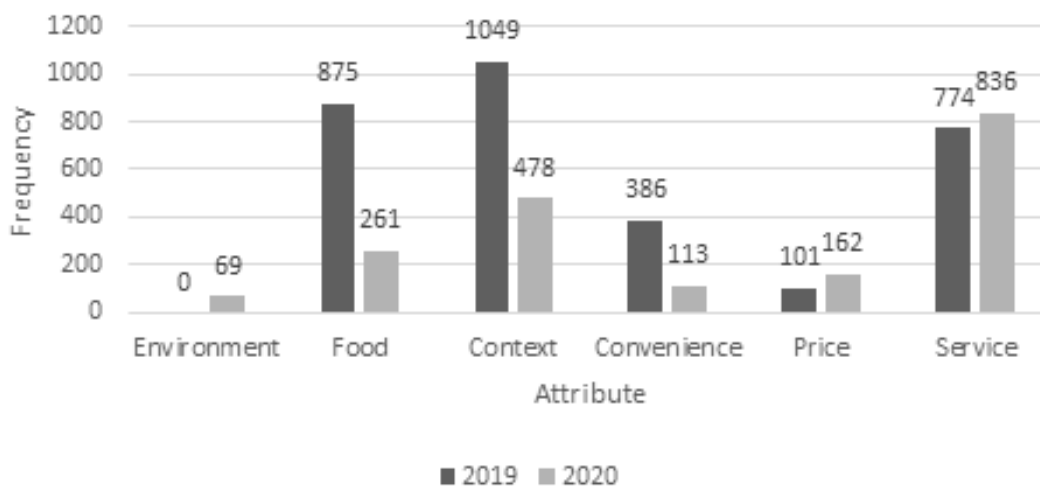
most frequent expression was “worth a visit”, in the second period, the most frequent expression was “food and service”. Other terms that include the word “service” or that are related to it have taken more prominence. The emergence of two expressions with equivalent meanings with a high number of references in the second period was also observed, namely “good value for money” and “great value for money”. It is also noted that the expression “make a reservation”, which occupied the 10th place of the most mentioned expressions in the first period, no longer appears in this list in the second period.

While in the first period under analysis, the most determining topic in the totality of the reviews was “Ponta Delgada”, in the second period, the most determining issue was “friendly staff”. The themes “feel cosy” and “highly recommend” have also emerged, and these have assumed some relevance in the second period under analysis. It is also verified that the theme “make a reservation” ceased to be relevant in the second period under examination.

Then, a relation was established between the topics generated by Wordstat and the theoretical attributes related to the quality of service in restaurants considered more relevant, having identified the attributes “environment”, “food”, “context”, “convenience”, “price” and “service”. While in the first period under analysis, the most determining attribute was “convenience”, in the second, the most determining attribute was “service”. In both periods, it can also be seen that the attribute “context” is one of the most impacting, ranking third in the first period under analysis and second in the second period. There is also the emergence of the “environment” attribute with relevance in the second period under analysis. It can also be observed that the “price” is one of the least relevant in both periods under analysis, appearing to be associated with the original topic “reasonable prices”.

In addition to the contribution of each attribute, the frequency with which each attribute is referred to in the first and second periods under analysis was observed. It is verified that, while in the first period, the “context” and the “food” are the attributes referred to most frequently, in the second period, the most mentioned attributes are the “service” and the “context”. The graphic representation of the frequencies of each attribute in the two periods under analysis is shown in Figure 3.

Figure 3. Frequency of the Attributes Identified in Reviews



Source: Own Elaboration

As for the sentiment analysis, in the second period under review, there was a slight increase in the percentage of words classified as positive (from 85,95% to 86,23%). At the same time, a slight decrease in the percentage of the words classified as negative (from 14,05% to 13,77%) occurred. The positivity tone expressed in overall evaluations also slightly increased (from 95,58% to 95,74%).

In both periods under review, most references to monetary aspects fall within the “value” subcategory, the emphasis being most evident in the second period under review. The weight of this subcategory exceeds that of the rest (from 18,73% to 20,45% of the observations).

In the second period under analysis, there is an increase in the percentage of words associated with disease (from 18,07% to 32,14%) and, at the same time, a decrease in the percentage of words associated with health (from 81,93% to 67,86%); also, there is an increase in the percentage of words associated with danger (from 9,80% to 14,29%) and, at the same time, a decrease in the percentage of words associated with safety (from 90,20% to 85,71%); additionally, there is an increase in the percentage of words associated with cleaning (from 43,08% to 52,24%) and, at the same time, a decrease in the percentage of words associated with dirt (from 56,92% to 47,76%).

5. Discussion

Of the 18 restaurants under review, 11 saw their ratings rise in the second review period. In both cities, the average value of the classifications increased between periods under analysis. Considering the average of all the classifications of each period under analysis, an increase from 4,82 to 4,87 between periods was confirmed, suggesting a slight improvement in the perception of quality during the pandemic.

Also, the results obtained through the analysis of the textual contents of the reviews are consistent with an improvement in the perception of quality, and there was an improvement of the implicit sentiment in the reviews registered in the pandemic context. In both periods under analysis, the sentiments identified in the reviews are mostly positive. This coincides with the results obtained by Tian et al. (2021), who suggest that clients use more positive than negative words in their reviews.

In both periods, the word most frequently mentioned in the reviews registered was “food”, which is consistent with the results of the study by Tiago, Amaral, & Tiago (2015) that pointed to food as the most adopted variable in the content generated by users. However, the word “service” became more prominent in the pandemic context, having passed from the fifth most mentioned word in the first period under analysis to the second place in the pandemic period.

Regarding the short expressions identified most frequently in the reviews, in both periods of analysis, the most reported were “great food” and “Indian food”. It was found, however, that the third place of the most mentioned expressions, which in the first period was occupied by the expression “excellent food”, came to be occupied by the expression “great service”. Regarding more extensive expressions, while in the period before the pandemic, the most frequent expression was “worth a visit”, during the pandemic, the most frequent expression was “food and service”. Also, at this stage, it was found that the expressions that include the word “service” or related became more referred to in the context of the pandemic, denoting greater importance of this attribute. There was also an increase in the frequency of the expressions “good value for money” and “great value for money”, suggesting a greater perception of value.

The term “make a reservation”, which was the tenth most frequently mentioned expression in the first period under review, is no longer included in this list in the second period, which suggests that it is easier to obtain a table without a reservation in a restaurant in the context of a pandemic, which may relate to the lower turnout to these establishments, resulting from customers’ initial reluctance to go to restaurants, as reported by Al-Marzouqi and Yahia (2021).

As for the main topics extracted from the reviews of each period, while “Ponta Delgada” was the most determinant in the period before the pandemic, “friendly staff” became the most relevant in the pandemic context. The topics “feel cosy” and “highly recommend” also emerge, assuming some relevance in the second period under analysis. This analysis also shows that the theme “make a reservation” is no longer relevant during the pandemic period. Relating these topics to the theoretical attributes identified in the literature, namely those proposed by Gan et al. (2017) and those contemplated in the Institutional Dineserv model and validated by W. G. Kim et al. (2009), it was possible to identify the following attributes in the analyzed reviews: “environment”, “food”, “context”, “convenience”, “price” and “service”.

While in the period before the pandemic, the most determinant attribute in the reviews was “convenience”, during the pandemic period, the most determining characteristic was “service”. In both periods, the attribute “context” is one of the most determinants, ranking third in the first period under analysis and second in the second period. The results obtained on the “context” attribute are in line with the study’s conclusions by Gan et al. (2017), which proposed that this would be the third most determining attribute for the evaluation of experience by clients.

On the other hand, the attribute “food”, although corresponding to the word most mentioned in the frequencies obtained, emerged, in terms of importance, in the fourth position in both periods. There was also the emergence of the attribute “environment” in the context of the pandemic. It was observed that the attribute “price” will have been one of the least determinants in both periods under analysis, appearing only associated with the original topic “reasonable prices”. Gan et al. (2017) point to “price” as the second least determinant attribute for the evaluation of experience by customers, which is consistent with the reduced relevance of this attribute in the reviews analyzed.

Concerning the frequency with which these attributes are referred to, it was found that, while in the first analysis period, the “context” and the “food” are the attributes referred to most frequently, in the second analysis period, the most mentioned attributes are the “service” and the “context”. Thus, these results also suggest an increase in the relevance of the “service” attribute.

Regarding the frequency of words that fit in the subcategories relating to “monetary relations”, in both periods under review, most references fall within the subcategory “value”, which will indicate a good perception of the value received vis-à-vis the costs incurred. This importance seems to be even more evident in the second period under consideration, where the weight of this subcategory far exceeds that of the rest. These results are in line with the authors who suggest that in a pandemic context, the predisposition of clients to pay more to have an adequate experience increases, as reported by Couto et al. (2020).

In the second period under analysis, there was an increase in the relative frequency of words associated with “disease”, which seems to indicate a greater concern for the disease in the context of a pandemic. There was also an increase in the relative frequency of words associated with “danger”, which suggests a higher risk perception in the context of a pandemic. Byrd et al. (2021) showed that customers tend to mistakenly perceive that restaurant food is a source of COVID-19 contagion, which may justify the results obtained. Despite this, the results show that in the second half of 2020, there was an increase in the relative frequency of words associated with “cleanness”, which will indicate the perception of adequate hygiene measures applied by establishments in the context of a pandemic. This is an aspect of which customers will have become more aware during the pandemic and impacts their preferences, as suggested by J. Kim and Lee (2020). Al-Marzouqi and Yahia (2021) also emphasize that, although the perceived risk of the disease may negatively impact the perception of quality of service, strict compliance with health measures tends to mitigate this effect.

6. Conclusions and Implications

Customers play an increasingly determining role in what is communicated about businesses and, consequently, in how other potential customers view them. In addition to reinforcing the importance of managers focusing on creating value for customers, this paradigm shift requires a continuous adaptation of models and tools to assess service quality so that they are increasingly aligned with consumer expectations.

The crisis caused by the COVID-19 pandemic in the various sectors, and in particular in the restaurants sector, has reinforced the importance of providing a service that meets customers’ expectations, as the quality of service has an impact on their satisfaction and, consequently, their loyalty, which at this stage will have been particularly decisive for the continuity of many businesses.

There is a consensus that online reviews registered by users are reliable and useful sources of information to understand customers’ perceptions. Many authors advocate applying hybrid methodologies and using text-mining techniques to obtain useful knowledge, which was tested in this research.

Through the analysis of the results obtained, it was verified that there was an impact of the COVID-19 pandemic on the perception of quality in restaurants. Furthermore, both quantitative and qualitative analyses produced results that indicate an improvement in this perception during the pandemic.

The results obtained through the analysis of the textual content of the reviews also allowed us to attest that there has been a change in the importance of the attributes that determine the reviews made by the clients. In the pandemic context, the attribute “service” acquired a greater extent, while in the period before the pandemic, the most determining attribute was “convenience”. Also, the attribute “context” is particularly decisive for the overall review, and this importance increased in the pandemic context, mov-

ing from third to second place between periods. The attribute “food” appears only in fourth place concerning the topics that most influence the total reviews registered in both periods. Thus, it highlights the importance of providing a “service” that exceeds customers’ expectations and understands the “context” in which they visit the establishments, not neglecting the other attributes identified.

It was also confirmed that the “price” is not a determining attribute for the overall review, being generally evaluated as “reasonable” by the clients who refer to it. Moreover, in a pandemic context, the perception of value was further strengthened in its relationship with price.

With regard to health, safety, and hygiene issues, it was found that, although there are more concerns about health issues and the perceived risk associated with going to a restaurant during the pandemic, this does not seem to affect customer satisfaction; reviews even reveal an increase in the perception of cleanliness. Therefore, the establishments must comply with the best hygiene practices to avoid the fears related to the disease affecting the perception of quality.

The findings support the idea that managers can gain from a clear customer orientation based on comments that work as an information source to assess customers’ preferences and perceptions. Although the value of this approach is undeniable, it is recommended that businesses develop large-scale data treatment procedures since the manual and individual analysis of this often non-standard content may not be feasible. Considering the dimension of the business units and the resources available, this is quite a challenge that can find support on machine learning techniques to collect, process, and analyze information.

Tourism destinations should also seek to equip themselves with tools to extract useful knowledge from the enormous amount of data generated in the various tourism activities which users essentially create. Although this is a differentiation factor of destinations, there is still little research on the contribution of the restaurant sector to the development of Smart Tourism Destinations. This gap should also motivate further work on the knowledge obtained through the enormous amount of data produced at every moment on such rich and revealing experiences as restaurant meals. It should be stressed that this methodology and the techniques applied are considered reliable, and their application to other phenomena and sectors is recommended.

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Hospitality Employers and Employees' Perceptions Regarding Covid-19 Support Measures: The Case of the Algarve Region (Portugal)

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ABSTRACT

This paper aims at investigating hospitality employers and employees' perceptions regarding governmental policies and measures implemented during Covid 19 crisis, in the Algarve, one of the most tourist regions of Portugal. The methodological framework is associated with a case study based on a set of 51 interviews to Algarvean hospitality employers and employees. A content analysis of interviews on the effects of the pandemic on hospitality was carried using the software QSR NVivo 12. Covid 19 employment impacts were considered as 'very high' and 'high' in the Algarvean hospitality. Portuguese governmental intervention was classified as good, but more support should be enhanced, namely associated with four main policy areas such as 'income-generating support measures', 'cost reductions', 'legal framework', and 'health and safety'.

KEYWORDS

Employment, Covid-19, Tourism and Hospitality, Governmental Intervention, State.

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1. Introduction

Tourism is a leading sector, and it has emerged as one of the most influential industries and service exports in the world. During the Covid-19 pandemic, tourism was one of the most affected economic sectors (UNWTO, 2020, p. 2). Since tourism is a labour-intensive sector, it plays a major role as a driver of economic growth and development in most countries (Garcia & Porto, 2021). Hospitality as a core industry in the tourism value chain was destabilised by issues of job performance, job insecurity and unemployment.

In this context, the present paper aims at investigating hospitality (hotels and restaurants) employers' and employees' perceptions regarding the measures implemented by the state in one of the most important tourist region of Portugal, the Algarve.

Section 1 presents the theoretical framework based on the discussion of how Covid-19 has potentiated hospitality labour market crisis and the importance of government intervention. Section 2 reflects on the qualitative methodology applied, which was a content analysis using NVivo 12. Section 3 presents the results of the case study, namely the Algarvean hospitality employers' and employees' perceptions regarding impact of Covid-19 and the role of the government in addressing the employment crisis. The final considerations offer grassroots insights into how to support employment in crisis conditions.

2. Literature Review: Covid-19 Hospitality Employment Impacts and Future Solutions

Due to the Covid-19 pandemic, the world's economy was shut down almost overnight (UNWTO, 2020) with 'unprecedented international travel restrictions and stay-at-home orders' that have resulted 'in severe global human, social, and economic disruptions since World War II' (Gössling, Scott, & Hall, 2021; Priss & Chukhno, 2021). However, there is evidence that during the critical period, countries, regions, or urban/rural territories showed different vulnerabilities and uniqueness concerning the impact that their hospitality sector suffered (Herod, Gourzis, & Gialis, 2021; Micháľková & Gáll, 2021).

The tourism industry is perceived as 'very vulnerable to crises of different origin such as natural disasters, epidemics, economic crises, political crises, terror, etc.' (Priss & Chukhno, 2021, p. 1). From an economic perspective, the pandemic crisis exposed (even more) the high vulnerability of this industry (OCDE, 2020) as well the sensitivity of all parts of the hospitality industry value chain (Jung, Jung, & Yoon, 2021).

Jomo and Chowdhury (2020) highlighted the uniqueness of the Covid-19 crisis which was caused initially 'by supply disruptions, largely due to government-imposed "stay-in-shelter lockdowns"' (Jomo & Chowdhury, 2020, p. 226), which exerted a high level of impact at an unprecedented speed (Priss & Chukhno, 2021). The consequences of restrictions induced a downward slope in hotel occupancies and revenues (Bartik, Bertrand, Cullen, Glaeser, Luca, & Stanton, 2020). Simultaneously, nearly all restaurants felt obliged to limit their operations to take away only.

In the literature review, employment is frequently associated with the economic, environmental and social impacts of the pandemic (Jomo & Chowdhury, 2020; Kitamura, Karkour, Ichisugi, & Itsubo, 2020), side by side with impacts on global production and prices (Kitamura et al., 2020; Islam, 2021). Income, demand, exports, imports, foreign exchange shortages, consumption, carbon footprints (CFP), well-being and development (Jomo & Chowdhury, 2020; Kitamura et al., 2020) were also frequently discussed.

Regarding the employment impacts of Covid-19 on hospitality industry, three levels should be considered, namely: macro (global, policy, government), meso (organisational) and micro (employee) (Baum, Kralj, Robinson and Solnet, 2016, p. 2815; Dogra, 2020). The severity of Covid hospitality employment impacts in the short, medium and long term Covid is also underlined (Deb & Nafi, 2021; Micháľková & Gáll, 2021; Perles-Ribes, Ramón-Rodríguez, Jesús-Such-Devesa, & Aranda-Cuéllar, 2021). Firstly, affecting part-time and temporary workers (Belov, 2021) and secondly, bringing about profound changes in the sector (Priss, & Chukhno, 2021). This led to uncertainty intensifying the precarious nature of work in the hospitality industry.

In this context, there is a recognition of the importance of government policies and measures in order to enhance sustainable development. Liu, Wang, McCartney, and Wong (2021) set forth two instructions – intra- and post-coronavirus – which could be instrumental in future tourism development.

Different fields, such as legal, financial, fiscal, health prevention and safety, and the promotion of new attitudes towards hospitality work and hospitality workers, were underlined in the relevant literature.

Micháliková and Gáll (2021) stated the importance of legal measures. They proposed that would 'help to find endogenous solutions to fragmented destination management in the most important and vulnerable tourism regions or legislative solutions related to the amendment to the Tourism Promotion Act' (p. 680). Jomo and Chowdhury (2020, p. 226), pointing out the relevance of financial measures, specified that 'Multilateral financial institutions should intermediate with financial sources at low cost to supplement the International Monetary Fund's Special Drawing Rights to lower borrowing costs for relief and recovery'.

Once Covid-19 virus may cause a supply-demand doom loop in the absence of a strong macroeconomic response, conventional monetary policy on its own is unlikely to reverse the loop. Padilla (2020, p. 2) underline that governments should adopt expansionary fiscal policies and the success of those fiscal stimuli will depend, among other things, on the competitiveness of their economies, i.e. the 'degree of market power' in product and services markets.

So, the virus leads to the government intervention, where fiscal policies are highlighted, which demands some consideration of the Keynesian response, which tends recurrently to be applied in crisis contexts. As Skidelsky (2020, p. 346) suggested, '... the hope lies in the reopening of the economy and in a V-shaped recovery in order that governments can reduce their 'fiscal burden'.

It is worth noting that through hospitality stakeholders, the industry could 'emerge from the pandemic with changed attitudes to hospitality work and hospitality workers' (Baum et al., 2020, p. 2813). That would be a substantial change because the hospitality industry is often associated with 'precarious labour forces' and a 'high level of precarity for employees' (Robinson, Martins, Solnet, & Baum, 2019; Baum et al., 2020). To overcome subemployment and seasonality, policymakers may consider increased regulation of a re-energised market and the need for skilled workers.

Additionally, and namely during a global crisis, organisations must pay attention to employees' psychological capital (Mao, He, Morrison, & Coca-Stefaniak, 2020) once the intensity of positive employee perceptions is commensurable to the amount of help that organisations supply. 'Higher levels of job insecurity will have a negative impact on employees' work engagement' (Karatepe, Rezapouraghdam, & Hassannia, 2020, p. 3).

In this context, Covid-19 is perceived as a challenge and opportunity (Belov, 2021; Liu et al., 2021). On the bright side, the crisis could enhance future sustainable development of territories, markets and industries' performance. The OECD 'Tourism Policy Responses to the Coronavirus' underlined the need to prepare sector recovery plans based on innovation and investment. Governments should promote structural transformations with a view to making the tourism economy 'stronger, more sustainable and resilient' (OECD, 2020, p. 5). Looking forward, the 'OECD Tourism Trends and Policies 2022' (OECD, 2022, p. 16) pointed out that an 'accelerated action is needed on greening the recovery and climate change, and the mitigation and adaptation measures required, including financing and investment, for tourism to play its part'. As main action domains, 'Foster integrated, agile, forward-looking policies', 'Build resilience in the tourism ecosystem' and 'Promote a green tourism recovery' are highlighted.

3. Methodology

This research investigates employees' and employers' perceptions of government measures and policies implemented to support the hospitality industry (hotels and restaurants) during the second Portuguese lockdown to capture the impact of the Covid-19 pandemic on the Algarve region. It seeks also to determine how employers and employees feel regarding future threats and opportunities to the hospitality sector due to the Covid-19 pandemic and their main forecasts.

It is based on a case study associated with how the Algarve's hospitality employers and employees perceive the Portuguese governmental measures to address the Covid-19 crisis. Yin (1994, p. 23) states that the case study method is appropriate for topics that are considered practically new, and that examines or inquiries about a contemporary phenomenon in its real environment.

A review of the literature concerning the state of the art based on articles associated with the Covid-19 pandemic crisis and tourism/hospitality employment was undertaken. Databases such as SCOPUS, Web

of Science and Google Scholar were used. Keywords searched were employment, Covid-19, tourism and hospitality, governmental intervention, state.

The empirical research considered 57 semi-structured face-to-face and remote interviews (March to April 2021), from which were selected 51 valid interviews, based on a stratified sampling to select four subsets of the target population involved in the hospitality industry across the Algarve (hotel employers, hotel employees, restaurant employers and restaurant employees).

A content analysis of interviews on the effects of the pandemic on hospitality employees and employers was carried using the software QSR NVivo 12 to systematise and categorise textual data. QSR NVivo 12 is an application widely used by researchers and scholars in qualitative fields (Bazeley, 2007; Robin & Elsen, 2017) due to several benefits, including transparency and the ability to tackle a multiplicity of document types, being able to capture both quantitative and qualitative data. The literature review confirmed the nodes used in NVivo 12 to categorise the interviews. The nodes created – Covid Impact; most positive companies measures, least positive company measures, threats to labour market, labour market opportunities, state's role, forecasts - and their subnodes permitted the categorisation of interviews. These nodes and subnotes are associated with the content analysis categories.

4. Results: The Algarve Region Case Study

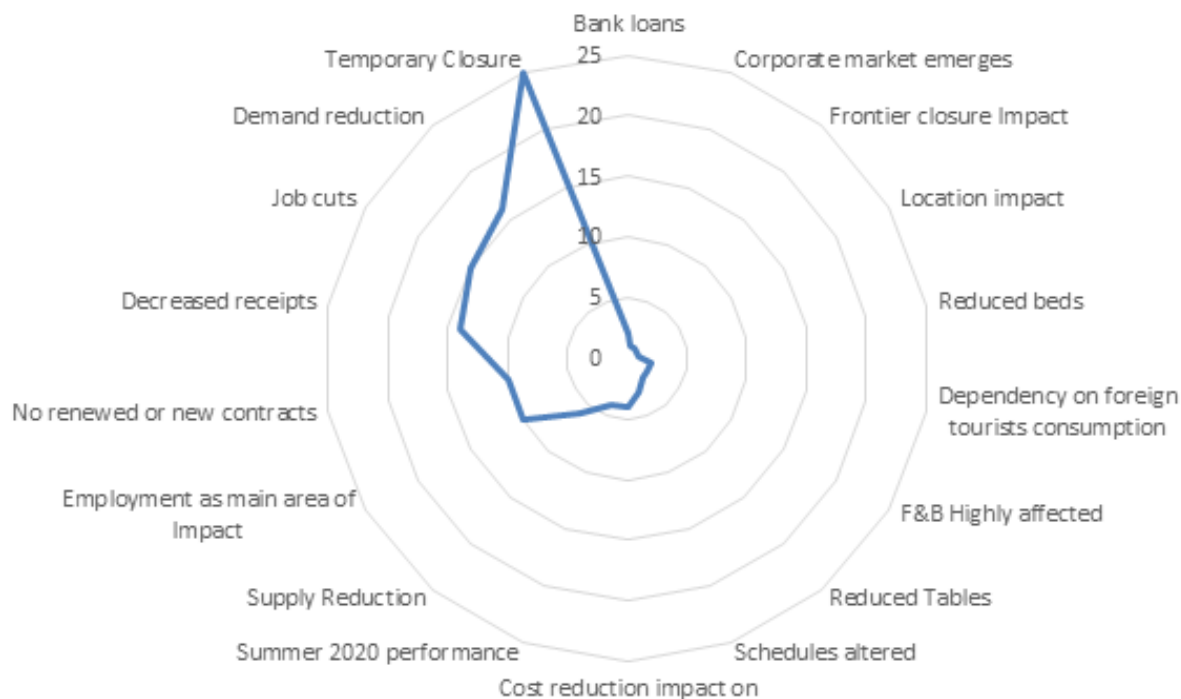
4.1 Algarve Hospitality Covid Impacts

In Portugal, T&T was responsible for a total contribution to GDP of 17.1% in 2019, and in 2020, only 8.1% of the total economy, with a decrease of 56.7% (in contrast with a decrease of 7.7% of the real-economy GDP change). The total contribution of T&T to total employment varied from 20.7% (2019) to 17.7% (2020), a decrease of 16.0%, which affected jobs (WTTC, 2021).

The Algarve economic sectorial structure is associated with the region's resources (such as sun and sea), mainly based on six strategic sectors: hospitality, restaurants and tourism, health, ICT, creative activities, the food industry, and maritime activities. Due to covid impact, in 2020, 'the employed population was approximately 195,900, corresponding to a decrease of 17,300 jobs in relation to the previous year' (European Commission – EURES, 2020).

Regarding the Covid-19 level of impact, most interviewees pointed out a 'very high impact' (69.1%) or 'high impact' (22.1%). With less relevance, the 'medium impact' was also mentioned (8.9%).

The Covid-19 impacts were mainly associated with companies' 'temporary closure' (23.3%) leading to difficulties, such as reduction in 'demand' (14.9%) and 'supply' (5.6%) as well as 'decreased receipts' (13.1%), leading to 'job cuts' (14.0%) and 'no new or renewed contracts', positioning 'employment as main area of impact' (9.3%). 'Socio-psychological' impacts on employers and employees were also underlined. With less than 5% weight, the following stood up: 'schedules altered', 'cost reduction impact on workers', 'Summer 2020 performance' and 'supply reduction' (Figure 1).

Figure 1. Covid-19 Impact on Tourism /Hospitality Industry

Source: Own Elaboration

The very high and high levels of Covid-19 impacts required government support, which was considered by more than one-quarter of respondents as 'good' - 'good support received' (27.5%). However, some interviewees perceived those aids as 'insufficient & late supports' (13.3%) and asked 'for more intervention' (11.6%). On the other hand, some interviewees underscored a 'heavy-handed state' (12.5%), namely due to restrictive containment measures.

Interview extracts provide evidence of the positive perceptions of the state's role:

'In my opinion, state support was essential at this stage, as it helped many companies not go bankrupt and thus keep many jobs.' (hotel employee, interview 18)

'In terms of employment, yes, they gave some help, and if it weren't for that, I believe that many companies, including ours, might have to go to a collective dismissal of workers.' (hotel assistant director, interview 12)

'The state had and continues to play a fundamental role in supporting companies through financial support measures, both in terms of moratoria and extraordinary support for the progressive resumption of activity...' (hotel reception manager, interview 13)

'The state did very well in terms of support to companies. They gave it right away in the first wave, and they always continued to help, realising that companies were not going to have the profits that they had in previous years.' (hotel employee, interview 44)

Among the measures implemented by the government during the pandemic period, support to employment maintenance through 'simplified lay-off' [see Decree-Law No. 10-G/2020, of 26 March, with subsequent amendments (consolidated legislation)] stood out.

'I think it has been good, the fact that the simplified lay-off has been an asset. It has been a great cushion for many companies; otherwise it would be quite complicated.' (hotel assistant director, interview 13)

'In an initial phase the lay-off was a good decision (...). I think the measures adopted by the government were acceptable, mainly in the "support for the recovery" and "lay-off" incentives that supported the salaries of most employees and for almost a whole year.' (sous chef and hotel employee, interview 17)

'The lay-off measures, moratoriums, etc., were very important for the companies. However, it has been proven that they are not sufficient to safeguard companies and their workers.' (corporate and leisure relations director, interview 52)

Additionally, some interviewees pointed out the support associated with Covid-19 containment health and safety measures (e.g. purchase of protective material against Covid, such as masks, disinfectant products, acrylics). They also mentioned the 'support of liquid investment, namely partial exemption/compensation for rental payments', although benefits remained well below needs.

Government measures during Covid-19 influenced the options of companies, leading them to reopen or restructure their activity despite the uncertainty about the future of the pandemic. Among the public measures demarked, the companies' adherence and receptiveness to policies stood out, namely regarding the preservation of jobs ('maintenance of employment' and use of 'simplified lay-off' (see Decree-Law No. 46-A/2020, of 30 July, with subsequent amendments and Ordinance No. 102-A/2021, of 14 May), totaling around 34.7%). Furthermore, public measures in the field of health prevention and safety in the hotel industry tended to be welcome among corporate stakeholders (see certification 'Clean & Safe'—seal of Turismo de Portugal—and 'customer safety & contingency plans').

Among 'the most positive measures', innovation policies also stood out. In times of crisis and disruptive transformation in society, interviewees valued support for innovation (digital and organisational innovation) and highlighted measures that have improved 'new organisational efficiency' (8.1%), 'takeaway implementation & new menus' (5.8%) as well as 'new digital marketing' (1.7%) (Table 1).

Measures within the scope of strengthening sustainability, internationally delimited and reinforced by the national government, namely within the scope of preserving the introduction of water- and light-saving measures and waste management, were introduced. The focus on partnership enhancement also was underlined.

As for the 'least positive measures', they underlined the vulnerability and precariousness of employment during the pandemic. Despite public support, many hotels and restaurants had to lay off staff or temporarily dismiss some employees ('reducing the number of staff & staff overloading' (35.3%), 'no contract renewal of shorter or seasonal contracts' (25.5%), 'salary cuts and salary payment' (9.8%), 'total establishment or partial closure' (7.8%), 'dismissal of staff' (2%), 'working team reduction' (2%), among others (Table 1).

Table 1. Most Positive and Negative Measures Implemented by Hotel and Restaurants in the Context of Public Policy

Positive Measures		Negative Measures	
1º	Maintenance of employment strategies (20,2%)	1º	Staff shortening & overloading (35,3%)
2º	Clean & Safe (19,1%)	2º	No contract renewal shorter or seasonal contracts (25,5%)
3º	Layoff (14,5%)	3º	Changes in working schedules (11,8%)
4º	New Organisational efficacy (extending opening hours, flexible human resources staff training) (8,1%)	4º	Salary cuts and salary payment (9,8%)
5º	Adopt state recovery & guidelines (6,4%)	5º	Establishment total or partial closure (7,8%)

6°	Client safety & contingency plans (5,8%) Takeaway implementation & new menus (5,8%)	6°	Cutting workers' benefits (2%) No jobs offer (2%) Dismiss staff (2%) Weak company communication with workers (2%) Slow implementation of measures (2%) Non sustainable practices (2%) Working teams' reduction (2%) Compulsory holidays (2%)
7°	Remote work (4,4%) Salaries and workers' rights assured (4,4%)		
8°	Waste reduction (2,3%)		
9°	Building maintenance (1,7%) New digital marketing (1,7%) Hiring staff over summer & keep open (1,7%)		
10°	Checking on staff mental health (1,2%)		
11°	Keep open (0,6%) Focus on quality (0,6%)		

Source: Own Elaboration

4.2 Suggestions for the Government

The interviewees voiced suggestions for the government on how to manage Covid-19 and its effect on the tourism industry (Figure 2). It is worth noting that the main suggestions were intended to encourage better state actions during the Covid-19 pandemic and to value the lessons learned for future crises.

The suggestions could be categorised into four wide policy areas: 1. income-generating support measures, 2. cost reductions, 3. legal framework, and 4. health and safety.

Figure 2. Suggestions for the Government of Portugal on Providing Support for Employment in the Algarve's Hospitality Sector, 2021



Source: Own Elaboration

The most mentioned suggestion sprang up within the scope of income-generating support measures, loans and guarantees and income-providing relaunch schemes. Some interview extracts, within the framework of the node 'Give effective support to enterprises' (11%), were mainly associated with 'financial investment' and various resources provided for tourism:

'The government has helped our company, but it wasn't enough to keep it going, and we have had our mother company helping us out, but the longer this goes on, the more companies will fail.' (hotel director, interview 46)

'In this pandemic the government opened credits for the small and medium businesses as support trade (...). But we need more financing support.' (restaurant pastry shop employee, interview 40)

Additionally, and associated with the economic dimension and prospects for transforming the vulnerable structure of the Algarve economy, suggestions concerned the 'diversification of the regional economy' and 'improvement of sustainable practices' (12%); 'stimulate job creation' (4.8%), 'support national products' (4.8%), 'help local economy' (2.4%) and 'support internal tourism' (2.4%) were specified.

Within the framework of 'cost reductions', suggestions associated with employment support and tax-related interventions were also highlighted. The first was more closely related to measures such as 'support scheme paying wages', 'postponement of labour market contributions' and 'social security taxes reduction'. The second was closely associated with measures such as 'tax-related interventions (tax-relief SME)', 'postponement of VAT and tax payments', 'exemption from production tax' and 'tax relief for self-employed'. The most salient recommendation in this context was 'less taxes on business' (12%). The following extracts illustrate these points:

'... for hotels, which pay several taxes, there should be a reduction or a relaxation in the levies charged from companies that were the most affected by the pandemics.' (hotel and restaurant general director, interview 38)

'There are more and more government taxes, and consequently a growing burden on profits, ... so taxes should be lower during the pandemic context.' (hotel director, interview 51)

'It seems to me that the state's support could go further, either by decreasing the VAT or by decreasing the corporate income tax in order to alleviate their financial pressure.' (hotel director, interview 52)

'What the government could do was to reduce fiscal burden, namely the reduction of social security taxes and VAT.' (restaurant employee, interview 24)

In the domain of legal frameworks and bureaucracy and processes, a set of suggestions was prominent: continue lockdown & get rules right (9.52%), be clearer and more coherent (7.14%); extend moratorium period (4.76%), honour promises (4.76%), adopt better managed rules (2.38%), and ease bureaucracy (2.38%).

A set of interviews highlighted lessons to be learnt in future policymaking, namely transparency and equal access to information about funding and financing, as follows:

'The supports were not given in an equal way cross all the companies. Small and micro entrepreneurs have had great difficulties in gaining state support, which is unfair.' (hotel head of reception, interview 16)

'I have immense difficulties in understanding what supports will really help.' (restaurant owner, interview 65)

'In relation to supports for workers and managing partners, there was not the same criterion for providing the supports.' (restaurant employer, interview 47)

Regarding health and safety protocols (more masks, gloves, gowns, food packaging and other protective equipment), in addition to the extraordinary measures applied and the seal 'Clean & Safe', interviewees singled out the need to 'accelerate vaccination' (4.76%).

4.3 Threats, Opportunities and Forecasts

As the OECD (2020) proposed in the document titled 'Mitigating the impact of COVID-19 on tourism and supporting recovery', rethinking tourism leads to a reflection on identified threats and opportunities in the face of Covid. A selection of threats to and opportunities for tourism in the Algarve were also identified in the interviews (Table 2).

The main threats, mentioned in more than 50% of the references, were associated with employment uncertainty and unemployment linked with the provisional loss of revenues. The main opportunities were associated with innovation, namely new products, and services ('takeaway and home delivery' [16%], new markets, new clients, new job organisation, new and sustainable health and safety practices, new tools (emphasis on digital/online/virtual) and new company solidarity practices (Table 2).

Table 2 . Threats and Opportunities

Threats to Labour Market	Labour Market Opportunities
1° Uncertainty in labour market (27,7%)	1° Take away and home delivery (16%) No opinion (16%)
2° Unemployment (23,2%)	2° Job creation, rotation & temporary jobs (9%) New emergent markets & selection of clients (9%)
3° Lack of revenues (8,9%)	3° Service upgrade and automatic check- in (7%)
4° Lower demand & hotel number reduction (8%)	4° Online businesses, training online & remote work (6%)
5° Closing of frontiers (6,2%)	5° Positive vaccination & controlling pandemics (5%) New focus on health & safety and use of outdoor spaces (5%) Private chef home cooking (5%)
6° Seasonality of tourism (6%)	6° Innovation, differentiation & wine tourism (4%) Improved marketing & less market concurrence (4%)
7° Poor working conditions (3,6%) Lack of preventive management (3,6%)	7° Qualified workers available & better pool of workers (3%) Staff training & progress in companies (3%) Open new business & more micro businesses (3%) Catering for new market segments (3%)
8° Reduction in jobs contract period (1,8%) Reduction in working hours (1,8%) Decline in standards of services (1,8%) Uncontrolled pandemics (1,8%) Restrictive policies in outbound markets (1,8%) Bankruptcy (1,8%) Lockdown threat (1,8%) Buying power decreased (1,8%) Workers adaptation difficulties (1,8%)	8° Greater union in hotel sector & team solidarity (2%)
9° Long length recovery (0,9%)	

Source: Own Elaboration

4.4 Forecasts

As observed, forecasts were associated with 'positive expectations' (30.2%), 'company's future' (28.8%), 'negative expectations' (22.3%), 'differentiation between councils' (7.9%), 'individual professional expectations' (5.8%), 'territorial planning & management' (2.9%) and 'vaccination program dependency' (2.2%).

Forecasting was split between positive (30.2%) and negative (22.3%) expectations. The positive were categorised referred to the following: 'Algarve tourism will diversify', 'clients will overcome fear'. there will be a 'fast recovery', 'national market will grow', 'offers will improve', 'Portugal will benefit from being a secure country', 'sports events will be promoted', 'tourist operators will promote the destination' and 'the number of young tourists will rise'. The positive prognoses maintained that 'Algarve tourism will diversify' and 'the Algarve will recover fast'. The Negative points highlighted were 'excessive dependence on tourism', 'excessive numbers of workers', 'jobs in hotels will be temporary', 'length of stay will decrease', 'long recovery' and there will be 'problems similar to the 2012 crisis'. The negative projections pointed out the expectation of a 'long recovery' (10.8%). The business context was associated with the 'company's future'

(28.8%) and also envisaged 'hope in future' (12.2%) ('Algarve tourism will diversify, and the national market will grow') followed by a perception of uncertainty, 'the future is uncertain' (7.9%). Furthermore, but less incisive, there were also 'individual and professional expectations' (5.8%), 'the need for territorial planning and management' (2.9%) and 'vaccination dependency' (2.2%), which were also underlined in the context of future trends.

5. Discussion

The virus leads to the government intervention, where fiscal policies are highlighted, which demands some consideration of the Keynesian response, which tends recurrently to be applied in crisis contexts. As Skidelsky (2020, p. 345) suggested: "Keynes was for emergencies only. And we have the same reaction today".

Algarvean entrepreneurs and employees not only incorporate objective considerations but also subjective ones. Since the marginal efficiency of capital is at the centre of the investment decision and therefore at the centre of the problem related to employment (due to the role of investment in effective demand), it takes into account partially subjective assessments regarding the evolution of demand and costs. It turns out that Keynes replaces an interdependence scheme with a causal scheme, where macroeconomic functions are linked together. Consequently, there's the highlighting of the affirmation of the need for state intervention to correct permanent imbalances, of which underemployment is clearly the most visible. In fact, it is up to the state, through economic policies, to ensure that effective demand is sufficient to maintain full employment (Bremond, 1987).

State intervention must ensure a level of activity compatible with the full employment of the workforce. Keynes, once said 'The political problem of mankind is to combine three things: economic efficiency, social justice and individual liberty' (Padilla, 2020, p. 3). In a Covid context, as hitherto underlined (i) the Covid-19 virus may cause a supply-demand doom loop in the absence of a strong macroeconomic response; (ii) conventional monetary policy on its own is unlikely to reverse the loop; (iii) governments will have to adopt expansionary fiscal policies; and (iv) the success of those fiscal stimuluses will depend, among other things, on the competitiveness of their economies—i.e. the degree of market power in product and services markets (Padilla, 2020, p. 2). Additionally, as Liu et al. (2021) underlined it's important to consider not only intra but also the post-coronavirus, in order to enhance, in the future, a more sustainable tourism development.

Accordingly, the paper results put in evidence that employers and employees tend to underline the importance of government intervention. In this framework, government role should be aligned with 'spent money freely to keep up the incomes of millions of people prevented from working' (Skidelsky, 2020, p. 346). This may lead to a large number of people changing their industry to go where the cash flow is quicker. This global exodus could have a severe impact on the talent pool and may not recover until confidence is reinforced by employers and governments alike. Only through a compassionate approach taken by businesses can the workforce be saved (Dogra, 2020). Opportunities to upgrade the skill set, are namely: up-skill, re-skill, other innovations, and continuous education.

In line with the last paragraph assumption, one of the policy areas pointed by hospitality employers and employees was "income-generating support measures". Additionally, among the opportunities perceived they also underline: innovation, differentiation, qualified workers available & better pool of workers, staff training & progress in companies, catering for new market segments.

In the other hand, due to the crisis period, cost reductions, financial measures (see Jomo & Chowdhury, 2020), consideration of new legal framework (see Micháľková & Gáll, 2021), and introduction of health and safety measures are pointed out by Algarvean inquiries in the context of macro, meso and micro levels (see Baum, Kralj, Robinson, & Solnet, 2016).

6. Conclusions and Implications

Covid-19 has impacted the hospitality industry in a severe way. The Algarve region, known for the high contribution of the T&T industry to total GDP, experienced a significant downward slope in business per-

formance. This led to high employment impacts, both short and long-term, linked to uncertainty, vulnerability, subemployment, precarity and unemployment. In this context, the call for a governmental policy response to mitigate the impacts of Covid-19 on the hospitality industry reinforced the need for intervention in numerous areas, such as fiscal, financial, legal, health, innovation, and sustainability, among others.

Within this framework, the interviews with Algarvean hospitality employers and employees showed very high and high Covid-19 impacts (91.2%) due to companies' 'temporary closures', 'demand and supply reductions', 'job cuts', and 'no new or renewed contracts, among other situations. Most interviewees felt quantitative and qualitative job insecurity. They felt not only threats in the context of their individual job in the near future but also weakened quality in labour relationships.

The government support was underlined as good. Nevertheless, some interviewees asked for additional measures, as they considered the actual aid 'insufficient' and 'late'.

The suggestions for government intervention were highlighted in four wide policy areas, namely income-generating support measures seeking effective support for enterprises and chiefly associated with 'financial investment'. Cost reductions based on measures such as 'support scheme paying wages', 'postponement of labour market contributions' and 'social security taxes reduction' were also considered highly. The legal framework and health and safety, highlighted through the 'Clean & Safe' certification, was also stressed.

Regarding threats, employers and employees singled out employment uncertainty and unemployment as associated with provisional loss of revenues. On the other hand, concerning opportunities innovation stood out: new products and services, new markets, new clients, new job organisation, new and sustainable health and safety practices, new tools (emphasis on digital/online/virtual) and new company solidarity practices, among others.

This study has some limitations due its focus on a narrow period of a couple of months, coinciding with the second lockdown in the Algarve. Additional coverage of subsequent times during the pandemic would have been helpful to guarantee a more valid and reliable picture of how employers and employees perceived the recovery from the most critical moments in which governmental aid was deemed crucial.

In this context, a follow-up to this study should focus on various times during the pandemic to capture the gradual opening of the economy and the decrease in restrictive measures for businesses. A more continuous and regular line of research should be implemented to understand the impact of Covid-19 on employment, taking into consideration the evolution of the pandemic along with the containment measures. In this way, this line of research should also consider low and high seasons (due to the high tourism seasonality in the Algarve) and the Covid-19 numbers of the main outbound tourist markets. Such an approach to employment in the hospitality industry could facilitate an analysis of the shifts in perceptions regarding the labour market situation. Additionally, a systematic and periodic evaluation or monitorization of hospitality employment characteristics should be developed to access emerging challenges to employment in the hospitality industry overtime.

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Thermal Tourism: Study of the Profile and Motivations of the Practitioner in Portugal

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ABSTRACT

Health and wellness tourism had a growing interest in the Portuguese population until 2019. However, with the appearance of Covid-19, several establishments had to close over these two years, this segment being one of the most affected areas. Many water users looked forward to the opening of the spa resorts to continue their treatments. Given the importance of this theme, this work has as its main goal the definition of a consumer profile and to identify the determinants of satisfaction of the thermal tourists, as well as to gauge the degree of knowledge of thermal tourism and specifically of spas in the Portuguese context. In methodological terms, a questionnaire survey was conducted among the tourists to achieve the research objectives. The results show a younger, healthier and diversified thermal tourism practitioner. It also reveals similarities with other profile and motivations studies. However, it is possible to notice a few differences. Practitioners are seeking a combination of a leisure and health dimension and valorise factors such as location and access of the establishments, quality of the services provided and rest and tranquillity. An issue regarding their length of stay has been identified. As they are locals and live in the same country as the thermal spa, most respondents do not stay overnight at the destination. In the future, it would be interesting to research product development and market strategies for diversified thermal practitioners.

KEYWORDS

Health and Wellness Tourism, Thermal User's Profile, Thermal Spa, Tourism.

ARTICLE HISTORY

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1. Introduction

Health and wellness tourism has become an important part of the tourism dimension (Brandão, Liberato, Teixeira, & Liberato, 2021), known for being connected with leisure. According to Rodrigues et al. (2022a, p. 352), thermalism combines both health and wellness, as the activity delivers an improvement in the quality of life and a “complete state of well-being, physically and psychologically”. The thermalism market has been gaining credibility in recent years. As shown by Rodrigues et al. (2022b), there has been an increase in publications regarding health and wellness and its different subjects. One of the main topics being studied is in regards the profile of people who frequent thermal spas with the intent of knowing their motivations, socio-demographic profile, characteristics, needs and desires. Knowing these aspects of the user allows thermal destinations to identify strategies and guidelines to differentiate them and provides businesses with information regarding the type of products to supply (Antunes, Gonçalves, & Estevão, 2022). Understanding tourists’ perspectives permits the creation of a competitive advantage for both destinations and businesses.

Therefore, thermalism is about medicine and well-being, leading thermal bathers to seek new experiences and see thermal spas as a place of relaxation and leisure. Given the importance of this theme, the main research object is health and wellness tourism and its segmentation, with special attention to the case study of thermal tourism in Portugal. Specifically, this study aims to evaluate the relationship between tourism and thermal tourism and understand the frequency with which tourists visit these places, their satisfaction, and better define their profile, thus contributing to the importance of health and wellness tourism.

Given the importance of this theme, the main research object is health and wellness tourism and its segmentation, with special attention to the case study of thermal tourism in Portugal. This study was developed due to the relevance of this emerging theme and the need to identify the profile and motivations of thermal practitioners in Portugal. In this sense, this study aims to evaluate the relationship between tourism and thermal tourism and understand the frequency with which tourists visit these places and their satisfaction, as well as better define their profile, thus contributing to the importance of health and wellness tourism. The applied research methodology followed a mixed methods exploratory approach integrating qualitative elements and quantitative research seeking to capitalise on the complementary nature of both methods. Qualitative research is presented through documentary research, and the analyses extracted from quantitative and quantitative research are present in the application of the questionnaire survey. The main goal of this research instrument is to present a profile of the thermal spa users in Portugal and compare it with the existing literature and, therefore, identify differences and similarities with other established profiles and verify the evolution of the health and wellness tourism segment.

After this introduction, the study is structured into five additional sections. The second section focuses on the theoretical framework of the theme, while the third section presents the research methodology adopted. The fourth section presents and analyses the results of the collected data, and the fifth section presents a discussion of the results. Finally, the final considerations of the study are presented. Given the importance of this work, it is hoped that it may contribute to creating or improving services/programmes that correspond to the needs and preferences of spa visitors, thus trying to achieve higher levels of satisfaction and revisit the spa.

It is hoped that it can contribute to the creation or improvement of services/programmes that correspond to the needs and preferences of the spa visitors, thus trying to achieve higher levels of satisfaction and revisit the spa.

2. Literature Review

Rodrigues et al. (2022a) have a study whose goal was to present a literature review and content analysis on thermalism studies found in well-known databases, namely Web of Science, Scopus, Science Direct, and PubMed. Their study aimed to explore the supply side, user profile, and market trends. According to the authors, the success of thermal establishments is related to the increase in the importance and regard given to health and well-being in recent decades. The authors identify three types of thermal es-

establishments that vary in their goals and functionality. There are Recreational, Wellness, and Therapeutic/Curative thermal establishments. Edlin and Golanty (2015) emphasised that the wellness segment is not just about the treatment of symptoms of illnesses. It also includes “self-healing, health promotion and the prevention of illness” (Edlin & Golanty, 2015, p. 354). It is also mentioned by Rodrigues et al. (2022a) that many consumers of wellness products and services are tourists, the reason why their research focuses on the motivations of wellness tourists. Table 1 summarises the different authors’ perspectives regarding motivations that Rodrigues et al. (2022a) analysed. The authors notice that regarding wellness consumers, we can study “not only their motivations but also their purchasing behaviours and the reasons behind their decisions to acquire wellness services” (Rodrigues et al., 2022a, p. 354).

Table 1. Literature Review on the Motivations of Wellness Tourists

Author	Study	Results
Dimitrovski and Todorović (2015)	Motivations for the Wellness market	Two groups: Socially Active and Self-focused tourists. Main motivations: socialisation, excitement, and relaxation.
Kesser et al. (2020)	The Wellness Tourist Motivation Scale	Seven dimensions: 1. Movement and Fitness; 2. Healthy Food and Diet; 3. Meditation and Mindfulness; 4. Rest and Relaxation; 5. Learning about Wellness; 6. Self-care; 7. Nature and Disconnect.
Kim and Yang (2021)	Motivations for booking a wellness hotel	Two groups: Seeking healing and Explorers of local history. One looks for a health dimension, the other seeks for a leisure dimension.
Kessler et al. (2020)	Motivations for wellness tourism by generation groups	Three groups: Baby boomers: “to look and feel better”; “to experience activities outdoors”. Generation X: “to escape the demands of everyday life”; “to experience activities outdoors”. Millennials: “to escape the demands of everyday life”; “to return to everyday life feeling rejuvenated”; “to feel grounded in nature”.
Aleksijevit (2019)	Motivations for selecting a wellness destination	Wellness trips are purchased through travel agencies. Tourists research destination’s facets and explore different review sites. They picture these reviews as a greater recommendation than word of mouth.
Strack and Raffay-Danyi (2020)	Factors to choose spas in the Hungarian market	There are four important factors: price, cleanliness of the facilities, types of pools and recommendation of family and friends.

Source: Rodrigues et al. (2022a)

Brandão, Liberato, Teixeira and Liberato (2021) have built a study to identify the motivations of tourists who practice thermal tourism, to understand the benefits they search for, how their socio-demographic profile affects their motivations, and how their motivations influence the trip’s characteristics. This study was applied to North and Central Portugal. They came to the conclusion that there is a relationship between the desired benefits of thermal tourists and their trip characteristics, such as group composition, overall motivation for the trip, chosen thermal destination, and the number of nights of stay. Rodrigues et al. (2022a), also referred that Brandão et al. (2021) concluded that the socio-demographic profile affects the motivations of tourists from this segment, the services provided, the determination of operations, the creation of new spa services, marketing and its strategy. Liberato et al. (2021) proclaim a connection between the services provided and the profile of thermal spa visitors in both the North and Central regions of Portugal. Table 2 presents studies mentioned by Rodrigues et al. (2022a) that describe the profile of thermal users/tourists. Most profile results indicate that people are mainly elderly and women with different educational levels and retired or full-time workers. Some are being supported by social security and/or insurance, others are following medical indications. Their monthly income is in a lower range, varying from less than 500 euros to a maximum of 2000 euros. Overall, younger people do not represent a significant market.

Table 2. Literature Review on Thermal Users/Tourists Profile

Author	Study	Results
Aleksijevit (2019)	Profile of wellness practitioners (generation groups)	Two groups: Generation X (35-54 years old) and Baby Boomers (55-74 years old). Characterised by high education level, higher average income, and preference for travelling with friends and family.
Strack and Raffay-Danyi (2020)	Frequent profile in Hungary's thermal spas	Families, the Elderly, and couples without dependent children. Young people are marked as an uncommon segment. The group that prevailed is people who are taking advantage of healing services through social insurance. A group with considerable numbers consists of people who are following their doctor's recommendation.
Esiyok et al. (2018)	Who is more likely to be in the segment?	Seniors are probable to be in thermal tourism than other age groups.
Dryglas and Różycki (2017)	Profile of tourists visiting European Spa resorts	Beneficiaries of health insurance/ social security plans: older with chronic diseases. People who have no support and pay from their own means: are younger and healthier.
Pinos Navarrete et al. (2020)	Profile of tourists visiting a Southern Spanish Spa	Three groups: people supported by The Social Thermalism Programme (IMSERSO) with a stay between 10-12 days; individual thermalists who stay more than 4 days; a group of thermal tourists who stay less than 5 days. The largest number of users comes from the Social Thermalism group, and the group of thermal tourists is the one that increased the most. People from the programme IMSERSO have, in average, 72 years old. The private users (with no subsidy) also represent a significant part of the population over 65 years. The thermal tourists generally come in pairs, groups of friends and families.
Anaya-Aguilar et al. (2021)	Profile of spa tourists in Andalusia, southern Spain	The average age is 56, and in the majority females (61.8%). Their occupation is concentrated in two groups: retired (53.1%) and employed (34%). There are three groups in connection with their average monthly income: less than 500 euros (29.8%), between 501 and 1000 euros (33.1%) and between 1001 and 1500€ (26.6%). A bigger part of the sample related more to the low-income ranges.
Brandão et al. (2021)	Motivations to practice thermal tourism in the North and Centre of Portugal	Results show that thermal tourists are mostly women between the group ages of 55 and 64 years old and 65 and 74 years old. 25% of respondents have a higher education degree. Almost half are retired, and one-third have a monthly income of 1000 and 2000 euros.
Liberato et al. (2021)	Profile of thermal tourists in a pandemic context	Mainly female, and the ones aged between 45 and 54 years are increasing. Basic education, high school and university degrees are dominant among the respondents. Approximately 50% are retired/pensioners, and nearly 40% are full-time workers. 49.8% have an average monthly income of up to 1000 euros, and 33.8% between 1001 and 2000 euros.
Silvério et al. (2021)	Profile of thermal spa users in Chaves, Portugal.	The results show that 70% are women with an average age of 58 years. 44% have a higher education degree. The majority of individuals are retired, and Portuguese (80%). From these 72% are from the North region.

Source: Rodrigues et al. (2022a)

Vaz et al. (2022) administrated a study to design a profile on Chaves thermal spa's users and examine their experience as they're visiting the establishment. To understand the features of the user, they analysed socio-demographic information and identified characteristics, motivations, preferences, demeanours, and perceptions. Their results showed that the user of Chaves Thermal spa is a retired, married, or in a consensual union woman with an average age of 69 years old living in the north of Portugal. In fact, 63.7% of their sample was not new to Chaves Thermal spa as they have visited it before, which led them to conclude that people were satisfied with their experience and decided to visit the spa again. Indeed, 75.6% of respondents affirmed not visiting other thermal spas. Only 37.4% of thermal users prefer to take advantage of the spa services alone, as most come accompanied. Their average period of stay is 14 days. However, only 56.2% searched for a place to stay, which is explained by the fact that most people live in the same area as the spa. Their preferred time of the year to attend the spa is between July and September and October-November, as 44.4% and 42.5% of users chose these months, respectively. They valorise the company of family and friends during their stay. The respondents visit the spa seeking therapeutic thermalism services (64.5%) and for health reasons (57.7%). A small percentage (4.2%) visited the thermal

spa for leisure reasons. Over half of the respondents, 55.9%, found out about the Chaves Thermal spa program through medical advice. The medicinal quality of the water and the quality of the facilities are the most important aspects to the respondents for choosing a thermal spa. Other important aspects include the equipment's quality, quality of services supplied, service diversity, customisation of services, specialisation and techniques used, human resources' competence, knowledge, and availability.

Masiero et al. (2020 in Rodrigues et al. 2022a) provided the idea of thermal spas being structures with multi-specialisations, with a possible rehabilitation value, adequate staff for rehabilitation, and technologies with rehabilitative and assistive capacities. People who visit these thermal spas are mostly older, as seen before. Karagülle (2008 in Rodrigues et al. 2022a) shows the intended treatment for older people at thermal spas. The author mentions that their therapies can be seen from three distinct aspects. First, the antiaging effects, the preventive effects on processes of biological and physiological aspects that happen in older people, or the therapeutic effects over pathological issues. Next, the treatment, rehabilitation, and prevention of illnesses in older individuals and lastly, a complement to other types of treatment.

Rodrigues et al. (2022a) showcase three forecast trends for thermalism based on the content analysis of different literature. They envision that there will be an increase in demand for a dimension focused on prevention, well-being, and leisure. They also consider that the users' profile will change for a healthier, younger, and more diversified. For them, thermalism will have a high probability for tourism activity with the segments of thermal tourism and health and wellness tourism. Vaz et al. (2022) consider that tourism segments like thermal tourism and health and wellness tourism have contributed to the development of tourism in destinations worldwide. They establish that thermalism and tourism have a powerful relationship and refer to the leisure dimension under activities like tourism which improve health and well-being.

3. Methodology

The main goal of this research is to study the evolution of health and wellness tourism and its segmentation, with special attention to the case study of thermal tourism in Portugal. Given the research objectives, this research followed an exploratory, mixed-methods approach that integrates qualitative elements and quantitative research to capitalise on both methods' complementary nature. The quantitative research method is present in the application of the questionnaire survey, and the qualitative research is present through documentary research (the literature review presented previously) and the analyses taken from the quantitative research.

In this sense, a questionnaire survey was applied to thermal tourists. This survey was implemented online through the Google Forms tool and made available on social networks, namely Facebook, between July 20th and September 9th of 2021, having been shared in groups with themes of health and wellness and thermal spas. A pre-test was carried out on a small sample, and researchers related to tourism were consulted to better refine the measuring instrument. A probabilistic simple random sample was the sampling method utilised.

This instrument aims to assess the relationship between tourism and thermal spas and to understand how often tourists visit these places, how satisfied they are, and to further define their profile, thus contributing to the importance of health and wellness tourism. The target for this survey were individuals who practice thermal tourism. The main focus of this survey was to understand how often respondents go to the hot springs and whether they are satisfied with their visit. Questions on tourism practice were also elaborated in order to understand what kind of tourism people prefer and with whom they usually spend their holidays.

The survey was composed of 26 questions and divided into 3 sections. The participants answered by using a five-point Likert scale. Answering the survey wouldn't take longer than 10 minutes and was easily understood by the respondents. The different sections and questions were based of Vaz et al. (2022) empirical study to identify the user profile of a Portuguese Thermal SPA Establishment and the authors' interest. This empirical study appeared to be in line with the main goals of this paper and allowed for a direct comparison of results. The first section of the survey was related to the practice of tourism, where questions were asked about the type of tourism most practised, with whom the respondent usually travels, and what was the destination of the last trip. At the end of this first section, the respondents were

asked if they had ever visited a thermal spa, and all those who answered affirmatively were directed to the second section of the survey. If they had never visited a spa, they moved on to the third and last section concerning the socio-demographic profile. The second section, and the most relevant in this study, was related to the thermal practice, with questions about the last thermal resort visited, how they knew about it and therapeutic indications. The last section, as mentioned, is related to the respondent's socio-demographic profile, where they were asked about their age, nationality, and academic qualifications.

The survey received 208 responses, 74 of which correspond to individuals who have practised thermal tourism. IBM SPSS software, version 26.0, was used for the statistical treatment of the data. A descriptive analysis was conducted based on the results obtained with SPSS.

4. Results

This paper's qualitative results are shown in the literature review previously shown and will be compared to the results obtained with the quantitative method in the discussion. Based on this literature, the applied survey was developed and interpreted. As mentioned, given the objectives of the present study a questionnaire was applied to tourists. This questionnaire, in which data collection was carried out using the Google Forms, was made available on social networks, namely Facebook, between July and September 2021, having been shared in groups with themes of health and wellness and thermal spas, totalling a sample of 208 responses. As previously mentioned, given the objectives of the present study, a questionnaire was applied to tourists. For the application of this questionnaire, data were collected using Google Forms, which was made available on social networks, in groups with themes of health and wellness and thermal spas, between July and September 2021. The study sample totals 208 responses from tourists, of which 74 (35.6%) of the tourists have already performed the practice of thermal tourism.

This total sample, i.e. 208 tourists, seek out Sun and Beach Tourism on their trips, representing 39.4% of the responses. This type of tourism is followed by Cultural Tourism, Leisure Tourism and Nature and Adventure Tourism, in a remarkably close race, with 19.7%, 19.2%, and 18.3%, respectively. Only a non-significant percentage of the respondents stated that they seek Health Tourism in their activities. The results show that they prefer to go on holiday with other people, as 59.6% showed they travel with their family and 26% indicated their partner. Most stated that they travel 2 to 3 times a year (41.8%). However, a close value also stated that they travel only once a year (41.3%).

The respondents' last trip was within Portugal, having Algarve and The Azores as popular destinations. The most preferred foreign country was France. The main reason for their last trip was to go on vacation, with a crashing 71.2%. Visiting family/friends is also one of the reasons behind their latest travel (15.9%). Health and Wellness is the third most chosen reason (5.8%). When asked if they had ever attended a thermal spa, 64.4% sustained never been to one. The 35.6% of respondents who visited a thermal spa are divided into three categories. Those residing in a thermal spa destination are the most common answer (20.2%). Respondents who visited a thermal spa as a complement to their trip represent 12% of the answers, and only 3.4% have it as their goal for the trip. The Thermal SPA of Caldas das Taipas is the most mentioned by the group of people who have attended thermal spas before. People also referred to Thermal SPA of Gerês as their next favourite. Hungary was the most professed foreign country.

Since this study aims to construct a profile of people who attend thermal spas, the sample reduces to 74 of the 208 responses, representing the 35.6% previously mentioned. The motivations to practice Health and Wellness Tourism can vary. The results show that a Leisure and Relaxation motive is the most selected, as 62.2% of people chose it. Indicating that escaping from everyday stress, spending time with their family, and being "pampered" is their primary interest while visiting thermal spas. Health as motivation comes in second, picked by 16.2% of respondents. For some, both motivation factors were behind their intention on visiting a thermal spa, representing 13.5% of responses.

Half of the respondents indicated having no therapeutic indication for being in a thermal spa (50%). The other half is characterised by Rheumatic and Musculoskeletal issues, including problems from the Respiratory System. When individually selected these therapeutic indications for being in a thermal spa represent a total of 21.6% (10.8% each). However, if we look at the fact that people could choose more

than one option, making different combinations, it is possible to conclude that a Rheumatic and Musculo-skeletal indication was the most paired option.

Overall, the "Recommendation from family and friends" is the reason the respondents found out about the spa's thermal program they last visited (35.1%). Significantly 25.7% found out about the program through the Internet, and only 17.6% were following Medical Advice. The promotion made by the thermal spa itself allowed 16.2% of respondents to find out about its program.

The time of year most convenient for visiting a thermal spa, according to the total amount of times selected, even through combinations, is Spring (April - June). If you look at the individual response (without combining other times of the year), Summer (July - September) represents 20.3% of responses, and Spring comes in second with 18.9%. The preferred combinations by the respondents are Autumn (October - November) and Winter (December - March) with 9.5%, and Autumn and Spring with 6.8%.

While visiting their latest thermal spa establishment, the respondents took into consideration a few aspects. Location and Access were selected by 50 of the 74 inquired. The Quality of Services Provided and Rest and tranquillity were the second and third most selected aspects, respectively (30 and 29 times). The combination of Location and Access, Service Prices, and Recommendations from family and/or friends is the most selected by the respondents (5.4%).

A massive percentage of the inquired (75.7%) affirmed to not staying overnight at their thermal destination. However, 10.8% stated staying 1 to 2 nights, and 8.1% mentioned spending 3 to 5 nights at the destination. When asked where they spent the night, 12.2% answered the Hotel, 5.4% mentioned their Family and Friends' House and 5.4% referred to a Local Accommodation.

The respondents showed interest in returning and recommending the last spa they visited family and friends, as 81.1% answered yes and 18.9% said maybe. Only 27% of respondents affirmed thinking about visiting another thermal spa in the near future. The thermal spa of Gerês and São Pedro do Sul were the most referred to as the next thermal spa to visit.

When specifically asked about the Thermal Spa of Caldas das Taipas, 59.4% affirmed knowing the place. From this, 18.9% knew about it but never visited it, the remaining 40.5% of the value knew about it and had previously visited it. However, 40.5% of respondents have never heard of Caldas das Taipas Thermal Spa.

The social demographic features of the respondents show that 71.6% of individuals are women, on average 35 years old, and 56.8% of people are single. The respondents' nationality is Portuguese (91.9%), and mostly resided in the North of Portugal (59.5%). The majority (56.8%) have higher education and have a household size of four people (39.2%). They are employed (52.7%) and students (32.4%). Only a small percentage of respondents are Pensioners or retired (5.4%). Their average net monthly income is between 666 and 1300 euros (25.7%). Comparing the social demographic features of this reduced sample to the previous total will allow us to make conclusions regarding the differences and the impact of thermal spa users on the overall tourists.

Table 3 results are presented to allow comparison between the total sample and the thermal tourists sample. The mean age of 208 of the sample is 26 years, which differs from the 35 thermal users, meaning that the thermal users are older individuals. However, it is possible to conclude that the socio-demographic profile of the individuals is similar to the two samples.

Table 3. Socio-demographic Profile of the Thermal Tourists and the Total Sample of Tourists

Social Demographic Features		Sample	Total Sample
		74	208
Category		Percentage	Percentage
Gender			
	Feminine	71.6%	71.6%
	Masculine	28.4%	28.4%
Marital Status			
	Married / Non-marital partnership	36.5%	31.7%
	Separated / Divorced	6.8%	4.3%
	Single	56.8%	63.9%
Education			
	Basic Education (1st to 3rd cycle)	10.8%	9.6%
	High School (10th to 12th grade)	32.4%	36.1%
	Higher Education	56.8%	54.3%
Nationality			
	Brazilian	5.4%	9.1%
	German	1.4%	0.5%
	Italian	1.4%	0.5%
	Portuguese	91.9%	88.9%
	Other	X	1%
Residency in Portugal			
	North	59.5%	63%
	Centre	8.1%	5.3%
	Lisbon and Tagus Valley	4.1%	9.1%
	Algarve	1.4%	1%
	Azores	18.9%	10.1%
	Madeira	1.4%	0.5%
	Other	6.8%	11.1%
Household size			
	1	9.5%	8.7%
	2	17.6%	16.3%
	3	28.4%	24.5%
	4	39.2%	40.4%
	5 or more	5.4%	10.1%
Employment situation			
	Domestic	1.4%	0.5%
	Employee	52.7%	51.4%
	Pensioner / Retired	5.4%	1.9%
	Self-employed	6.8%	8.7%
	Student	32.4%	31.3%
	Unemployed	1.4%	4.3%
	Intern	X	0.5%
	Working student	X	1.4%
Average net monthly income			
	Up to 665€ (national minimum wage)	8.1%	11.1%
	666 – 1300€	25.7%	30.3%
	1301 – 2000€	23%	21.2%
	2001 – 3000€	14.9%	13%
	3001 or more	5.4%	5.8%
	I prefer not to say	23%	18.8%

Source: Own Elaboration

5. Discussion

The literature showed three future trends for thermalism, one of them being the change in practitioners' profiles for a healthier, younger, and diversified version (Rodrigues et al., 2022a). The study's results indicate that the average age of the user was 35, differentiating from studies like Vaz et al. (2022). It's also shown that only a small percentage of respondents are pensioners or retired (5.4%), which is different from the literature. Almost all studies mentioned by Rodrigues et al. (2022a) mark younger individuals as an uncommon segment.

Our results also show that half of the respondents have no therapeutic indication for being at a thermal spa, which correlates with the fact that they are healthier individuals with no specific issues to seek treatment. Our user is also diversified as it is not homogeneous. Even with other indicators prevailing in the different categories, it is noticeable that they vary in their marital status, education, household size, employment situation, and average net monthly income. However, our results aren't much different from other studies mentioned above.

The prevalence of women as the main user of thermal spas, their higher education, the fact that their nationality and residency consist with the location of thermal spa frequented, and their monthly income is in the lower brackets consists with the literature. Another thermalism trend was for health and wellness tourism to become a segment relevant to the activity (Rodrigues et al., 2022a). Our study considered health and wellness the third most chosen reason for the 208 individuals' last trip, only below vacation and visiting family/friends.

Research shows that people's motivations can be for both health and leisure dimensions, involving seeking healing, socialisation, relaxation, escaping from the demands of daily life, etc. (Rodrigues et al., 2022a). Our results put leisure and relaxation as the primary motivation, in fact, over 62.2% of people who visited thermal spas indicated it. Health comes in as the second motivation (16.2%), and only 13.5% chose both motivations. The combination of these two motivations is in line with the trend identified by Rodrigues et al. (2022a), which stated an increase in demand for a dimension focused on prevention, well-being, and leisure. Literature indicated four factors to choose spas in the Hungarian market: price, cleanliness of the facilities, types of pools, and recommendation of family and friends (Rodrigues et al., 2022a). Our sample preferred different factors. They mainly care for the location and access of the establishments, following the quality of services provided and rest and tranquillity. The results also differ from the literature regarding their length of stay at the thermal destination. Vaz et al. (2022) mentioned an average stay of 14 days, and other studies referred by Rodrigues et al. (2022a) indicate a variance between less than 5 days to 10-12 days. However, 75.7% of our respondents affirmed not staying overnight at their thermal destination. This could be explained by the fact that over half of respondents who visit thermal spas are residents of the spa destination. Vaz et al. (2022) noticed that 63.7% of their sample was not visiting Chaves thermal spa for the first time, our results show that 81.1% of respondents have the intention of returning and recommending their last thermal spa to family friends, showing the same loyalty referred by their study.

Because our study is composed of two different samples separated by being or not being a thermal spa practitioner, it is possible to notice that both profiles are similar with no significant differences. This could showcase the intent to join the leisure dimension with the health dimension regarding health and wellness tourism, as was stated in the literature. As our results showcase a lot of similarities with other studies, it's also subtly noticeable a few differences. These differences follow the trends mentioned by Rodrigues et al. (2022a).

6. Conclusions and Implications

This article has presented different motivations, characteristics, and socio-demographic profiles for thermal practitioners. It also presented a relation between the trends identified by Rodrigues et al. (2022a) and the socio-demographic changes showcased in this study. In a simple way, it displays literature reviews of relevant topics for this paper allowing a better comparison and discussion of results. The goal of creating a profile and identifying motivations for thermal tourism practitioners in Portugal was achieved. The preference for thermal tourists is based on the direct connection identified in the literature of leisure

activities and health and wellness. Tourists are not only seeking leisure and relaxation but also health-related treatments.

Our study's Portuguese thermal tourism practitioners are mainly single women with an average age of 35 years old and higher education. They are Portuguese, living in the North of Portugal with a household size of 4 individuals. They are employed and students with an average net monthly income between 666 and 1300 euros. These practitioners travel to thermal spas for leisure and relaxation to escape from everyday stress, spend time with their family, and be pampered during Summertime (July-September). They also don't have any therapeutic indications for attending the spa and found it through recommendations from family and friends. The practitioners attribute more importance to location and access, followed by quality of services provided and rest and tranquillity. They don't stay overnight at the thermal spa destination, but they intend to return and recommend the establishment to family and friends.

It is possible to conclude that there are visible similarities with the studies presented in this paper. However, our results appear to follow the three trends presented by Rodrigues et al. (2022a). This means that our study's thermal spa practitioners are younger, healthier, and diversified. They seem to be seeking a leisure, well-being, and prevention dimension of thermalism, implying an increase in demand for these aspects. Lastly, they show that thermal tourism and health and wellness tourism are a high potential for tourism activity as our general sample put health and wellness as the third reason for their last trip.

Concluding, our study reveals the start of a change in the health and wellness market. With younger, healthier, and more diversified individuals, destinations and thermal spa establishments have in their hands an interesting challenge. They need to be able to establish strategies to guarantee the satisfaction of their overall practitioners and provide adequate products. They're not only younger individuals but also locals and residents in the same country as the thermal spas visited, which affects their length of stay as noted in our study. In this case, the challenge is figuring out how to retain these individuals for longer and attract foreign visitors.

The Covid-19 pandemic has brought about strong changes and impacts throughout the world. The tourism sector and, specifically, thermal spas was one of the sectors most affected by the pandemic since they were the first to close doors and the last to reopen again. The economic impacts on this sector were quite significant. Therefore, the future of thermal tourism has the challenge to reinvent and adapt to this new reality, allowing the sector to recover. Fundamentally, the spa is considered an opportunity and a new market niche. The main concern is to increase the length of stay and make them have the best experience possible. The future of thermal spas is still uncertain. However, the best in new products and services has been a reality and, as previously mentioned, although the thermal spas are closed, a bet has been made on the dissemination and promotion of the thermal spas as a way to attract customers. This study seeks to contribute to the sector's strategic planning.

The main limitation of this study is the sample size. Due to Covid-19 restrictions, the questionnaire survey was not applied directly at a thermal spa establishment which would give more accurate information. This issue led the study to be applied through Google forms and shared on several social media means, which include social media groups about health and wellness, thermalism, thermal spas, and similar topics. With such a small sample, we cannot say that this is a meaningful statistic and that it represents the total population. However, it does not mean that it is irrelevant to the research topics as it provides interesting information about practitioners of thermal tourism. Covid-19 also led to the closure of thermal spas and other establishments which didn't allow in-person contact with the respondents.

For future research, it would be interesting to note if the same thermalism trends from Rodrigues et al. (2022a) are showcased in the practitioners' profile. Studies regarding possible differences in the user's profile of thermal spa establishments after the Covid-19 pandemic would also bring relevant information to the matter. The virus SARS-Cov2 brought even more attention to individuals' health and wellness status. Identifying possible paradigm shifts in the thermal tourism segment between the before and after of the pandemic should also be considered. Plus, research on product development and market strategies for these diversified practitioners would also be intriguing.

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The Importance-Satisfaction Matrix as a Strategic Tool for *Termas de Chaves* Thermal Spa Priority Improvements

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ABSTRACT

Health and wellness tourism has gained increased interest from the public, which searches for spaces that assure health and wellness maintenance. Proof of this is the example of *Termas de Chaves* thermal spa, which has gradually grown demand for its products and services. In this context, this study aims to identify and analyse the attributes offered by the thermal spa since it is essential to know the customer's preferences and satisfaction. To this end, dimensions related to the determinants of importance that influence the respondents' satisfaction were evaluated. A questionnaire survey was applied on-site from 09 August to 20 December 2021, obtaining a total sample of 225 participants. After data collection, the importance-satisfaction matrix was applied for exploratory, descriptive analysis. The results show that customers give high overall importance and satisfaction to the attributes under study. Moreover, it was possible to identify that the factor "availability and assistance provided by human resources" presents high importance but low satisfaction. Such a conclusion indicates that it will be necessary to adapt improvement strategies to increase customer satisfaction.

KEYWORDS

Importance-Satisfaction Matrix, Health and Well-being Tourism, Thermalism, Chaves Thermal Spa, Customer.

ARTICLE HISTORY

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1. Introduction

The tourism industry is constantly growing, and health and wellness tourism is currently seen as a tourism segment with a high level of competitiveness (Hartwell, Fyall, Wills, Page, Ladkin, & Hemingway, 2018). The ageing population is pointed out, as well as the way of life of individuals hit by the stress of modern life, factors that can justify the development of this tourism product. For these spaces to remain competitive and grow in the current circumstances, thermal establishments must adapt quickly to the volatile context. To conduct this analysis, the present study considers the particular case of *Termas de Chaves* thermal spa, located in the region of Chaves, a sub-region of *Alto Tâmega*. In this context, the importance-satisfaction matrix. This diagnostic tool was selected since it was revealed to be potentially valuable in understanding what the visitor expects from the experience. In the future, the results may help the establishment to gather efforts to supply products and services more directed to satisfy the visitors' expectations or, if possible, exceed them. For this purpose, 225 customers were surveyed for five months, where the thermal spa guests were asked to give their opinion concerning the attributes of the thermal spa, which were divided into eight fundamental parts: thermal water; facilities; equipment; services; techniques; human resources; relaxation; and companions. It was chosen to use the importance-satisfaction matrix, supported by the importance-performance matrix (IPA) introduced by Martilla and James in 1977. The tool is seen as a basic diagnosis technique (Johns, 2001) that facilitates the identification of improvement priorities in companies (Sampson & Showalter, 1999) and allows the concordance of efforts in strategic planning to improve relative competitiveness (Matzler, Bailom, Hinterhuber, Renzl, & Pichler, 2004). The study aims to investigate the perception of the importance and satisfaction of the attributes of the Chaves thermal spa. The weak points will be determined for each customer, and those with a competitive advantage will be highlighted. Following this introduction, the paper is structured in four additional sections to achieve the objectives. The second section focuses on the theme's theoretical framework, while the third presents the research method and methodology. The fourth section presents and analyses the results of the data collected. The final considerations bring the study to an end. The dissemination of this analysis results is expected to provide the thermal spa of Chaves with data which will allow a closer knowledge of their customer's preferences to create strategies to satisfy them and attract more customers.

2. Theoretical Background

The world economy is nowadays characterised by globalisation, in which the speed of evolution is perceived at all levels. With this, organisations must be increasingly aware of increased competitiveness in the market, which requires better quality of productivity and service supply to make profits. Thus, the success of an institution depends on its ability to meet its customer's needs, and it becomes essential to know them (Manhas, Charak, & Sharma, 2019).

In business activity, the literature suggests that tourism is a special case of services trade. Such services have particular characteristics which require special treatment in the analysis of competitiveness (Ferreira et al., 2022; Rodrigues et al., 2022). It involves providing services entirely focused on the customer, whose leading purpose is to match what the customer is looking for (Dwyer, Edwards, Mistilis, Roman, & Scott, 2009). Thus, the prosperity and success of this industry are entirely dependent on the customer. In recent years, the service industry focused on health and wellness tourism has grown in importance, with spas and thermal spaces representing a stable and reliable source of business. Health tourism may not be the core type of tourism when measured by the number of tourists, but it is currently considered one of the market sections with the highest income level due to its demand and high prices (Hodzic & Paleka, 2018). Indeed, society, in general, is more aware of health and well-being issues, both physical, psychological and social, due to the recommendations of the World Health Organization - WHO (Pereira, Fonseca, Coutinho, Cruz, & Araújo, 2017).

According to the ISPA Foundation - University Institute of Psychological, Social and Life Sciences Foundation (2021), spas are places dedicated to general well-being through a variety of professional services that encourage a renewal of mind, body and spirit. Panchal (2012) indicates that spa treatments generally provide positive experiences for tourists. Tang, Chan, Chew-Tan, and Wong (2020) provide evidence of this

positive pattern concerning spa baths, identifying 748 positive experiences and 187 negative experiences. At the same time, Nilsen (2013), Silvério, Ferreira, Alves, and Fernandes (2022), and Vaz et al. (2022) confirm that thermal experiences are valuable enough to be repeated. Choi, Kim, Lee, and Hickerson (2015) consider that spa spaces have become a popular tourist destination, largely influenced by the current emphasis on well-being in the tourist experience. Kim and Yang (2021) identify a four-stage transformation process of the well-being experience: realisation, involvement, transformation and appreciation. Huang, Chen, and Gao (2019) report that the spa experience was significantly associated with two well-being components, one including positive emotions and the other falling into life satisfaction leading to consumer loyalty.

Lo, Wu, and Tsai (2015) identified four service quality dimensions that significantly impact the positive emotions of spa consumers: tangibility, reliability, responsiveness and empathy. These authors state that a well-designed service process, standardised service procedures, and training of service staff and therapists can help generate positive emotions and create a better spa experience for users. These authors also consider that it is vital to provide quality services to stimulate the consumer to repeat the same experience in the future. Thus, it is understood that providing a quality experience encourages customers to return (Langvinienė & Sekliuckienė, 2008). The same idea is shared by Loureiro, Almeida, and Rita (2013), who argue that a positive and satisfactory experience is crucial for those who frequent a thermal spa because they want to praise it and recommend it to family and friends. The findings of Choi, Poade, Sohn, and Choi (2016) show that the most significant factor influencing repeated visits to spas is a memorable experience, which includes self-discovery, positive emotions, feeling connected to the space, and the experience of enjoying local, non-marketed products and attractions.

Recent studies analyse the users' point of view regarding the attributes they consider most important in the spa experience. Rodrigues, Brochado and Troilo (2020) point out aspects such as the infrastructure (building, exterior and interior design, environment) and the behaviour of the technical team. Smith, Jancsik, and Puczkó (2020) mention the importance of providing specialised information, the staff's guidance and the space's cleanliness. Previously, Bodeker and Cohen (2010) had mentioned essential safety, comfort, communication, customer service and technical capacity. The findings of Zeng, Li, and Huang (2021) report that the satisfaction of health and wellness tourists has a direct positive effect on their behavioural intentions after the experience. In turn, behavioural intentions have a direct and positive effect on competitiveness. Precisely because people share the good and bad of their experiences, intending to witness and advise others with their opinion and evaluation (Ahani, Nilashu, Ibrahim, Sanzogni, & Weaven, 2019). Liu, Fu, and Li (2019) report that the impact of on-site experience plays a crucial role in customer loyalty. And they further reveal that service performance and affective experiences are significantly associated with consumer satisfaction contributing to a good evaluation of wellness spa tourism destinations.

Therefore, the link between customer satisfaction and the organisation's success is entirely related, and the daily challenge for any institution is essential to recognise the needs of the public in the best possible way to provide high-quality services to retain them.

Understanding and using the importance-performance analysis (IPA) concept becomes relevant in this context. Martilla and James introduced it in 1977 as a tool for developing management strategies in companies that intend to examine and understand specific customer characteristics (Ferreira & Fernandes, 2015; Esteves & Fernandes, 2017). The performance is measured according to the customer's importance given to a product or attribute. Ideally, this measurement should use the same set of attributes so that the importance and performance can be directly compared. It is recommended that the values are presented using the median instead of the mean (Martilla & James, 1977). In essence, IPA combines measures of attribute importance and performance in a two-dimensional grid to facilitate data interpretation and obtain practical suggestions (Silva & Fernandes, 2011; Azzopardi & Nash, 2013). However, over time questions were raised regarding the conversion of the acquired results into action. First, the research findings required a great deal of effort to decode and interpret. And secondly, the analysis could only be conducted to analyse the attributes of importance or performance attributes. Still, it was later proved that knowing customer satisfaction is an added value. With this, IPA underwent changes proposed by Matzler, Heischmidt and Sauerwein (2003), in which the dimension "performance" was replaced by "satisfaction", thus creating the importance-satisfaction matrix. It presents itself as a marketing and management tech-

nique used to develop strategies focused on consumer attitudes that involve their preferences regarding the product/service.

This analysis presents several benefits as it is a simple, understandable and low-cost technique that provides insight into the attributes that should be taken into account, as it helps to understand the areas that may be consuming too many resources within a company and/or organisation. This instrument has gained widespread acceptance in many fields and is widely used in the tourism industry due to its simplicity and attractiveness in projecting results and suggesting strategic actions to improve competitiveness (Esteves & Fernandes, 2017; Machado & Fernandes, 2017). Nevertheless, the present state of our knowledge indicates Portugal still has no application studies in health and wellness tourism. The description of the importance-satisfaction matrix will be explained in more detail in the methodology section.

3. Methodology and Methods

The objectives of the present study can be divided into two main objectives. First, to identify the customer's perception importance of Chaves thermal spa attributes and the evaluation granted in terms of their satisfaction. Second, to identify the areas of concern of *Termas de Chaves* thermal spa and those with a competitive advantage. To this end, a questionnaire survey was applied to the *Termas de Chaves* customers, using the non-probabilistic sampling process during the 2021 thermal season, i.e., between 09 August and 20 December. A final sample of 225 participants who agreed to collaborate in the study was reached. All received an explanation of the research objectives, duration, and voluntary and confidential nature. Consequently, they gave their informed consent. The data collection period was conditioned by the pandemic caused by the SARS-CoV-2 virus that implied the closure of spas in the Portuguese territory for an extended period in the first half of 2021. It should be noted that the questionnaire preparation concerning importance and satisfaction attributes was supported by a questionnaire already implemented by Silvério (2020) in *Termas de Chaves* between 13 July and 17 September 2020, which had a final sample of 107 spa customers for the evaluation of 14 attributes.

The questionnaire used in this study is divided into two parts. The first part includes questions which allow us to characterise the customer profile, such as the socio-demographic information. The second part integrates questions dedicated to the analysis of the "importance" that customers attribute to the aspects of the thermal spa of Chaves and the study of their "satisfaction" to understand the actual performance of the spa concerning the services provided. In terms of validity, the questionnaire had been designed on the basis of related studies. For analysing these two dimensions, 11 items were used to account for the following variables: Thermal water, Facilities, Equipment, Services, Techniques, Human Resources, Relaxation and Escorts. Table 1 presents the attributes used by Silvério (2020) and how they were adapted for the present study.

Table 1. Attributes of the Thermal Spa of Chaves, by Study

Attributes of Silvério's Study (2020)	Research Study (2022)
Water quality	Medicinal quality of thermal water
Installations' quality	Installations' quality (cleanliness and safety)
Equipment quality	Equipment quality
Quality of services provided	Quality of services provided
Diversity of services provided	Diversity of services provided (treatments and program)
Expertise and techniques used	Expertise and techniques used
Knowledge and skills in human resources	Knowledge and skills in human resources
Availability and assistance provided by human resources	Availability and assistance provided by human resources
Service customisation	Service customisation
-----	Rest and tranquillity
-----	Presence of friends and/or family

Cronbach's alpha coefficient was calculated to analyse the reliability of the group of questions that answer the latent variables: Global Importance and Global Satisfaction. To measure the level of importance and satisfaction, a 5-points Likert-type scale was used. Thus, the respondent would have to answer, for the level of importance, using the scale: 1 - Not at all important; 2 - Not very important; 3 - Relatively important; 4 - Very important; 5 - Extremely important. For the satisfaction level, use the scale: 1 - Very Dissatisfied; 2 - Dissatisfied; 3 - Neither Dissatisfied nor Satisfied; 4 - Satisfied; 5 - Very Satisfied. Table 2 presents the data on the actual Cronbach's alpha coefficient values concerning Global Importance and Global Satisfaction for the 11 attributes under study.

Table 2. Reliability Statistics for the Importance and Satisfaction Dimensions

Latent Variable	Cronbach's alpha	Reliability
Global Importance (11 items)	0.956	Very Good
Global Satisfaction (11 items)	0.939	Very Good

Source: Own Elaboration

According to the internal consistency scale (Gliem & Gliem, 2003), the actual Cronbach's alpha coefficient values for the latent variables, importance (0.956) and satisfaction (0.939), assume very good reliability. This demonstrated that the scales of the formal questionnaire have considerable reliability.

After collecting data from the questionnaires, these were processed, and information was produced using exploratory and descriptive analysis. Univariate and bivariate statistical techniques were applied to process the collected data. Firstly, a descriptive analysis of the socio-demographic results is carried out to help analyse and characterise the study sample. Secondly, the Importance-Satisfaction matrix is used to identify the strategic determinants from the spa stakeholders' point of view.

As already mentioned, the importance-satisfaction matrix is applied to direct the performance improvement actions focusing on the opinion of the spa customers. This strategic management tool is straightforward and helps trace an organisation's panorama. Stakeholders have expectations and requirements to be met by the Chaves thermal spa, which may present different performance levels. It becomes necessary to monitor customer satisfaction and continuously improve. Thus, the importance-satisfaction matrix makes it possible to verify which attributes are positioned in each quadrant and which deserve greater attention and priority considering their positioning. With the scheme presented in Figure 1, it becomes possible to create plans and actions to improve the aspects deemed strategic to an organisation that is a priority for improvement interventions.

Figure 1. Importance-Satisfaction Matrix



Source: Adapted from Matzler, Heischmidt and Sauerwein (2003, p. 115).

The matrix is divided into four quadrants that enable the positioning of attributes according to importance and satisfaction to identify characteristics and possible strategies (Martilla & James, 1977; Matzler, Heischmidt, & Sauerwein, 2003):

- Quadrant I: Pointed as an area of concern, as the attributes are considered very important, but the level of satisfaction is below average. It requires immediate attention to improve the weak points;
- Quadrant II: Encompasses the strong points that have high importance and with which the customer is completely satisfied. In this quadrant, the main challenge/objective is to maintain opportunities to continue achieving competitive advantage with the standards already established;
- Quadrant III: Encompasses the weak points, where low importance and low satisfaction are central. Not enough attention is being paid to improving weaknesses, and additional effort is required;
- Quadrant IV: Includes those points with low importance and high satisfaction. It indicates the resources that should be used in another way are being wasted. Through the results obtained, it is possible to know which ones really need more concern and which ones are in a good phase.

This instrument proves to be very advantageous and straightforward to apply, allowing relevant information to be obtained so that the bodies that assume the management of an organisation, whether public or private, may reflect on which strategies to delineate for each service/product.

4. Results

4.1 Chaves thermal spa customer profile

Users of Chaves thermal spa are typically female (68%) with an average age of 68 years (standard deviation of 12.93). They are married (70.7%) and have basic education levels (56.4%). They are typically national individuals (96.4%) living in Portugal (97.8%) and coming from the northern region, particularly from the districts of Vila Real (44.4%) and Oporto (20.4%). These last results may be related to the geographical proximity of *Termas de Chaves*. The household is composed of two elements (59.1%). Regarding the labour situation, pensioners prevail (70.2%), and the customer has mainly a monthly net income of 666 to 1300 euros (42.2%). It was also perceived that 60.4% of the respondents are familiar with the Chaves thermal spa and do not frequent other spas (74.4%), indicating that customers are satisfied with the experience and revisit the space (Vaz et al., 2022).

4.2 Importance-Satisfaction descriptive analysis

Taking into account the eleven attributes under study regarding *Termas de Chaves* - (1) Medicinal quality of thermal water; (2) Installations' quality; (3) Equipment quality; (4) Quality of services provided; (5) Diversity of services provided; (6) Expertise and techniques used; (7) Knowledge and skills of human resources; (8) Availability and assistance provided by human resources; (9) Service customisation; (10) Rest and tranquillity and (11) Presence of friends and/or family - at this stage, it is essential to analyse and present the results obtained about the importance and assessment that the 225 respondents give to each aspect under study. Thus, in Table 3, it is possible to observe the indicators of statistical distribution concerning the importance of the attributes of the Chaves thermal spa, according to the opinion of the thermal bathers.

Table 3. Descriptive Statistics for the *Termas de Chaves* Importance Attributes

Attributes	Mean	Standard Deviation	Coefficient of Variation (%)
Medicinal quality of thermal water (n=225)	4.51	0.52	11.52
Installations' quality (n=225)	4.48	0.53	11.83
Equipment' quality (n=225)	4.41	0.57	12.92
Quality of services provided (n=225)	4.42	0.57	12.89
Diversity of services provided (n=225)	4.38	0.57	13.01
Expertise and techniques used (n=224)	4.40	0.57	12.92
Knowledge and skills of human resources (n=224)	4.39	0.56	12.75
Availability and assistance provided by human resources (n=225)	4.41	0.56	12.69
Service customisation (n=225)	4.40	0.56	12.72
Rest and tranquility (n=225)	4.49	0.51	11.35
Presence of friends and/or family (n=225)	4.36	0.78	17.88
Global Importance	4.42	0.57	12.95

Source: Own Elaboration

The overall average of the importance that respondents granted to the attributes of Chaves thermal spa was 4.42 points (standard deviation of 0.57). It is clear that the attribute "Medicinal quality of thermal water" is crucial for customers when they frequent the spa, with an average of 4.51 points (standard deviation 0.52). In turn, aspects such as "Rest and tranquillity" and "Installation's quality" are also considered very important, with an average of 4.49 points (standard deviation 0.51) and 4.48 points (standard deviation 0.53), respectively. On the other hand, aspects such as "Presence of friends and/or family", "Diversity of services provided", and "Knowledge and skills of human resources" showed the lowest scores, indicating low importance, namely 4.36 ± 0.78 , 4.38 ± 0.57 , and 4.39 ± 0.56 points, respectively. It should be noted that all attributes with the lowest score obtained a "3", which translates into a "Neutral" score, according to the Likert scale. The exception is the "Presence of friends and/or family", with a score of "1" corresponding to "Not at all important". This means that, although most respondents consider the presence of friends and family important in the experience, some customers do not have the same opinion. The attribute "Quality of services provided" is equally important for the spa customers, with an average of 4.42 (standard deviation 0.57). Then, "Equipment' quality" and "Availability and assistance provided by human resources" are at the same level of importance for customers with a slightly lower mean, respectively 4.41 ± 0.57 points. In turn, the attributes "Expertise and techniques used" and "Service customisation" present an average of 4.40 ± 0.56 points, revealing medium importance.

Overall, all attributes of the thermal spa, relative to the level of importance, present values considered very important - all higher than 4 points. This finding may indicate that in today's society, customers' expectations are increasing concerning the experience they wish to have in this type of space. Therefore, the capacity of the spas to fulfil them must be a constant and fast challenge that manages to keep up with the needs of their customers.

The global average of customer satisfaction concerning the attributes of *Termas de Chaves* is equal to 4.70 (standard deviation of 0.52) (Table 4).

Table 4. Descriptive Statistics for the *Termas de Chaves* Satisfaction Attributes

Attributes	Mean	Standard Deviation	Coefficient of Variation (%)
Medicinal quality of thermal water (n=225)	4.73	0.47	9.93
Installations' quality (n=224)	4.74	0.46	9.70
Equipment's quality (n=225)	4.71	0.46	9.76
Quality of services provided (n=224)	4.72	0.47	9.95
Diversity of services provided (n=224)	4.69	0.50	10.66
Expertise and techniques used (n=224)	4.70	0.48	10.21
Knowledge and skills of human resources (n=223)	4.61	0.63	13.66
Availability and assistance provided by human resources (n=223)	4.65	0.58	12.47
Service customisation (n=224)	4.68	0.57	12.17
Rest and tranquillity (n=225)	4.77	0.45	9.43
Presence of friends and/or family (n=224)	4.67	0.61	13.06
Global Satisfaction	4.70	0.52	11.00

Source: Own Elaboration

At first sight, it is evident that the attribute "Rest and tranquillity" stands out positively in the level of customer satisfaction, with an average of 4.77 points (standard deviation of 0.45). This is followed by "Installations' quality" and "Medicinal quality of thermal water", which present equally high values, namely 4.74 ± 0.46 and 4.73 ± 0.47 – such values reveal that respondents are satisfied with these aspects. The level of satisfaction regarding the "Quality of services provided", "Equipment quality", and "Expertise and techniques used" is slightly lower than the attributes mentioned above, with the mean scores being 4.72 ± 0.47 , 4.71 ± 0.46 and 4.70 ± 0.48 with a minimum score of 3 which means on the Likert scale "Neither satisfied nor dissatisfied". The attribute "Diversity of services provided" presents a good level of satisfaction for the participants with an average of 4.69 (standard deviation of 0.5). As regards "Presence of friends and/or family" and "Availability and assistance provided by human resources", the minimum value for these two aspects was "2", which means that there are "dissatisfied" customers with these attributes. However, most admitted being satisfied, translating into the mean scores of 4.67 ± 0.61 and 4.65 ± 0.58 . The attribute which presents the lowest satisfaction average is "Knowledge and skills of human resources", with answers with a minimum value of 2 and an average of 4.61 (standard deviation of 0.63).

Tables 3 and 4 also present the coefficient of variation. This indicator allows us to underline that the data under analysis is homogeneous, with low dispersion, where the coefficient of variation value is 12.95% for importance and 11.00% for satisfaction. In general, it can be said that the global satisfaction level of the customers is quite satisfactory. They are more satisfied with the rest and tranquillity that Chaves thermal spa offers and less satisfied with the knowledge and skills of the human resources.

4.3 Importance-Satisfaction Matrix

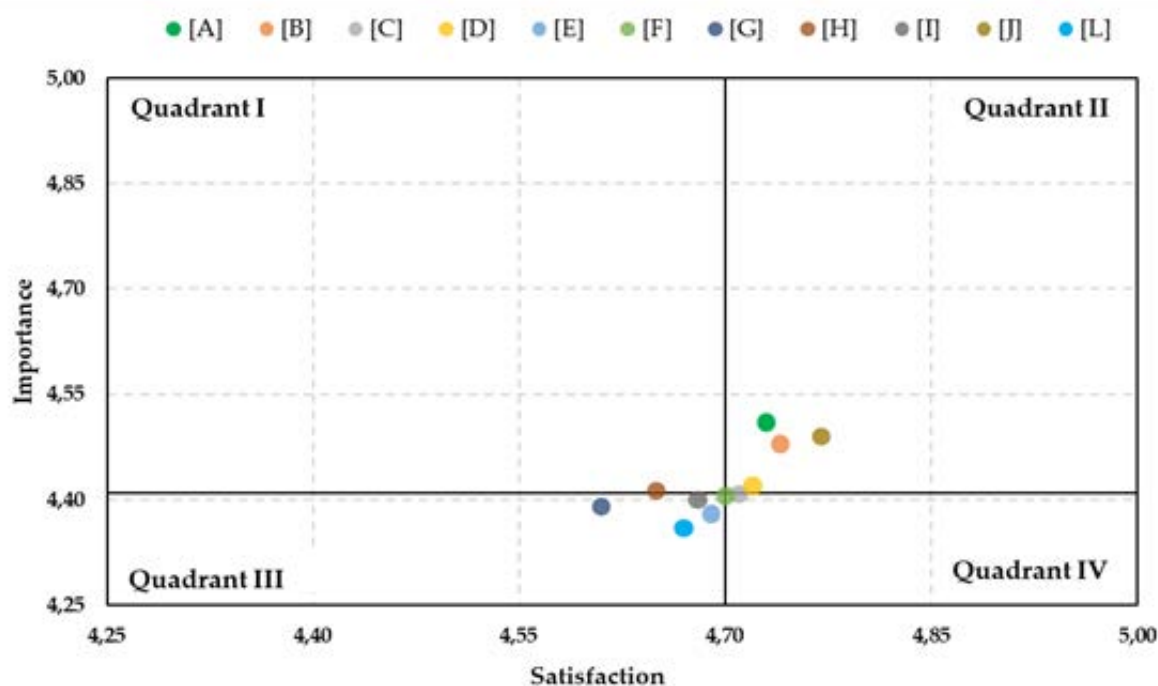
With the description of the attributes of *Termas de Chaves* regarding importance and satisfaction, it is now necessary to develop through the importance-satisfaction matrix the analysis of the factors under study. Following the model of Martilla and James (1977), the importance-satisfaction matrix is composed of four quadrants. Taking into account the values presented in Table 5, the matrix will include the attributes of the spa, the averages of each for importance and satisfaction, and the display of symbols, making the positioning of the attributes in the matrix more perceptible. It should be noted that the median values were used to define the axes of this study, considering the respondents' tendencies (Lynch, Carver, & Virgo, 1996; Silva & Fernandes, 2011).

Table 5. Data Used for the Creation of the Importance and Satisfaction Matrix

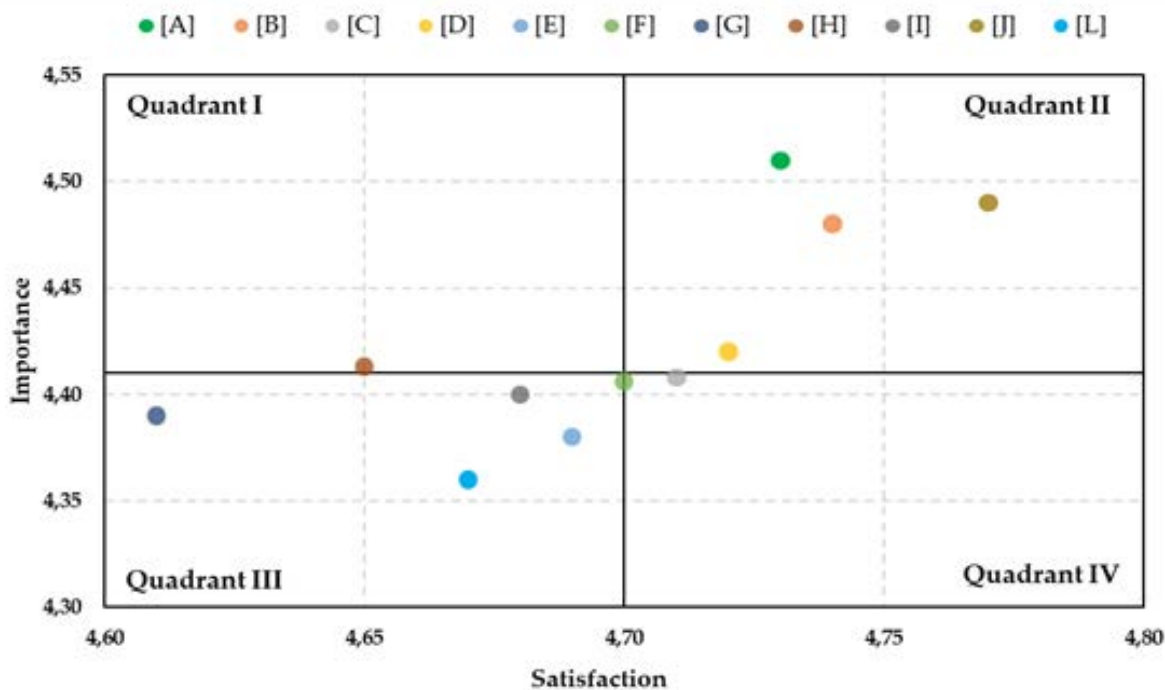
Attributes	Satisfaction	Importance	Symbol	Quadrant
Medicinal quality of thermal water	4.73	4,51	[A]	II
Installations' quality	4.74	4,48	[B]	II
Equipment's quality	4.71	4,41	[C]	IV
Quality of services provided	4.72	4,42	[D]	II
Diversity of services provided	4.69	4,38	[E]	III
Expertise and techniques used	4.70	4,40	[F]	IV
Knowledge and skills in human resources	4.61	4,39	[G]	III
Availability and assistance provided by human resources	4.65	4,41	[H]	I
Service customisation	4.68	4,40	[I]	III
Rest and tranquillity	4.77	4,49	[J]	II
Presence of friends and/or family	4.67	4,36	[L]	III
Median	4.7	4.4	-	-

Source: Own Elaboration

As shown in Table 5, the estimated values do not fall below 4.00 points. In Figure 2, where the importance-satisfaction matrix is presented, the median values will be used to cross the axes by representing the values in a Cartesian referential, as referred to above. In this case, the horizontal axis (X) equals 4.70 points, and the vertical axis (Y) equals 4.41 points. For better visualisation of the attributes' position, it was decided to present more detailed information (Figure 3).

Figure 2. Importance-Satisfaction Matrix for the *Termas de Chaves* Attributes

Source: Own Elaboration

Figure 3. Importance-Satisfaction Matrix with Details of the Attributes Positioning

Source: Own Elaboration

With the creation of the matrix (Figures 2 and 3), it was possible to position the attributes of *Termas de Chaves* according to the importance and satisfaction gave by the customers to the aspects under analysis:

- Quadrant I (Concentrate here): Only one attribute fits in this quadrant, namely “Availability and assistance provided by human resources” (H). It is located in an area of concern. This means that spa management should concentrate on this aspect. Thermal spa owners indicated this attribute as important in their choice to visit the spa. However, the evaluation of this attribute was below average. If this issue remains unchanged, in the future, it may result in complaints from customers, as well as criticism and negative reactions in the evaluation of the space. It is important to think and apply strategies to reverse customers’ opinions and increase satisfaction, such as raising the awareness of human resources for the implications of this issue through training actions;
- Quadrant II (Keep up the good work): The attributes “Medicinal quality of thermal water” (A); “Installations’ quality” (B); “Quality of services provided” (D), and “Rest and tranquillity” (J) are considered, by the spa visitors, relevant and valuable, as they fully meet their expectations and needs. However, it is a significant challenge for the spa to maintain its strategies and the good level of performance already established;
- Quadrant III (Low Priority): The attributes “Diversity of services provided” (E); “Knowledge and skills of human resources” (G); “Service customisation” (I), and “Presence of friends and/or family” (L) are positioned in the lowest priority area. This indicates the respondents do not give much importance to these aspects when looking for *Termas de Chaves*. Consequently, the spa needs to pay the same attention to these aspects because although the attributes have less importance, they also contribute to the impact of customer satisfaction;
- Quadrant IV (Possible Overkill): The attributes “Equipment quality” (C) and “Expertise and techniques used” (F) are perceived by the thermal spa management in a way contrary to the customer’s perception. They are paying too much attention to aspects that are not so important for the spa guests, as they are completely satisfied with these points. Therefore, *Termas de Chaves* should reconsider the importance of the available equipment and the current technical knowledge to the staff. Some changes should be made to reduce expenses related to these factors and invest in Quadrant I, namely in the attribute “Availability and assistance provided by human resources” (H).

5. Conclusions

The Importance-Satisfaction analysis measures how the importance and satisfaction of a specific attribute were perceived from an evaluator's perspective. This instrument facilitates the visualisation of results through a grid of strategic actions which, when applied, allows for the prioritisation of areas and options for investment or disinvestment in organisations.

In the first stage, the research revealed that the customers of *Termas de Chaves* thermal spa classify the 11 attributes under study with high levels of importance and satisfaction. The aspect that revealed the highest importance values was "Medicinal quality of thermal water". The least important one was the "Presence of friends and/or family". Regarding satisfaction, "Rest and tranquillity" was the most recognised aspect, while "Knowledge and skills of human resources" were the least appreciated by the thermal spa customers.

In a second stage, when the importance-satisfaction matrix was analysed concerning the attributes, it was concluded that the thermal spa of Chaves should concentrate its efforts on the human resources training in terms of availability and assistance given to the thermal customer. They should create new strategies to increase the public's satisfaction, consequently leading to their fidelity. Aspects considered very positive that should continue to receive the same approach are related to the quality of the thermal water, the quality of the facilities, the quality of services and the tranquillity of the space. Although these aspects are not very important for the thermal customers, the diversity of the services, the knowledge and skills of the human resources, the customisation of the services and the presence of friends and family should receive attention, as they also contribute to the customer's global satisfaction. Finally, it was found that the quality of the equipment and the specialised knowledge and techniques are attributes perceived as being of minor importance by the spa guests, who are satisfied with them. These are the attributes in which *Termas de Chaves* has invested the most, although they go opposite to what the customers perceive.

Above all, future strategies should focus on human resources, namely their technical skills and the availability and assistance they provide to the customer. Despite being attributes that have a lower level of importance, they are the ones that reveal the lowest satisfaction index.

One of the contributions of this work was to give the Chaves thermal spa detailed information about its customers' preferences. In this way, it is possible to redefine priorities and redirect activities to the needs of those who frequent the space, but also for future customers. As seen, the idea is to improve some points and maintain the good performance of others with the main purpose of pleasing and satisfying the consumer public.

It should be noted that the study faced some limitations throughout the research process. The questionnaire was conducted during a pandemic derived from Covid-19, which consequently interferes with people's predisposition to go to the thermal spa. This factor influenced the final sample, which in other circumstances would be higher, considering the number of customers who frequented the *Termas de Chaves* in previous years. Another limitation that compromised the study was the reduced period (09 August to 20 December 2021) for the questionnaire application, i.e. it was not possible to carry out an annual reading. This ended up "losing" customers who seek these services at other times of the year. Considering all the analysis carried out, we suggest, for future studies, collecting data for a whole year to cover the four seasons.

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