

The Evolution of Tourism in COVID Times: A Case Study

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Abstract: The Covid-19 pandemic has had a global impact not only in terms of the loss of human lives but also by imposing a different rhythm on the lives and work of individuals, leading to numerous social and economic transformations. Also, it has revolutionized tourists' choices. The latter have always been influenced by the perception of travel risks and the need for health protection. As a result, the impact of the pandemic on the tourism sector has led to a halt in tourist flows, mainly due to restrictions imposed by governments to limit the spread of the virus. The increase in tourist flows and the desire to travel after two years of decline have not failed to materialize in 2022. At the same time, the pandemic has also accelerated the transition to more sustainable models, such as industrial tourism, defined as a set of activities aimed at exploring and understanding the places, traditions, and culture of regions. The aim of this work is to analyze, from a social and economic perspective, the evolution of tourism demand in Apulia caused by the Coronavirus-19 pandemic, and to identify the new needs of tourists through the development of training systems and human resources capable of enhancing the opportunities that the area offers. To this end, we empirically measure the attractiveness and sustainability of new industrial tourism in Apulia and we implement indicators according to the European Tourism Indicator System and the methodology proposed by Baldazzi, et al. (2016). We find that after Covid, the evolution and success of the tourism sector are connected to a series of drivers based on sustainability, local identity and the attractiveness of the area. More specifically, tourists in Apulia are attracted to specific types of tourism such as experiential, cultural, industrial, and slow tourism. These tourism forms are characterized not only by sustainability, but also by the transformation of isolated and forgotten places into attractive and profitable tourist destinations through innovative entrepreneurial ideas. In addition, the integration of digital competence, with the application of collaborative methodologies in educational training paths, represents valuable tools to prepare tourism professionals to successfully tackle the challenges of a rapidly transforming sector.

Keywords: Apulia, Covid-19, Industrial tourism, Training

1. Introduction

The Covid-19 pandemic has had a global impact not only in terms of the loss of human lives but also by imprinting a different rhythm on the lives and work of individuals, leading to numerous social and economic transformations. The virus spread rapidly across the globe and had negative repercussions in numerous sectors, from healthcare to the economy, including the tourism industry. Government interventions to limit its spread included the closure of non-essential services, an increase in remote work, support for family income, and credit facilitations for businesses (Aina, et al., 2023). The effects of these interventions, however, despite being detrimental to the economic system, were deemed necessary. In 2020, the pandemic's impact on the tourism sector resulted in a halt in tourist flows, primarily due to restrictions imposed by governments to limit the virus's spread. Globally, the number of trips decreased by 74%. In Italy, the number of foreign arrivals contracted by 60% compared to 2019, with the "cultural" vacation segment being particularly affected, while beach or nature-based tourism experienced more moderate declines (Banca d'Italia, 2021). The increase in tourist flows and the desire to travel after two years of decline did not fail to materialize in 2022. Simultaneously, the pandemic also accelerated the transition towards more sustainable models, such as those represented by industrial tourism, defined as a set of activities aimed at exploring and understanding the places, traditions, and culture of territories. It has become a niche and, at the same time, one of the most widespread tourism practices to leverage the diversification of the tourism on offer (Badia and Ruggiero, 2019) and attract consumers. Therefore, this study analyzes the economic and social choices of tourists to examine the factors influencing their decisions. The trend of tourist flows pre- and post-pandemic in Apulia leads to reflections on the strategic role of a particular type of experiential tourism, called industrial tourism. Promoting the area and its industrial and manufacturing realities contributes to enhancing those productive processes linked to tourism that stimulate the growth of the area. Apulia, indeed, endowed with natural, cultural, environmental, architectural, and social resources, as well as UNESCO sites, is an appealing

¹Although it is a cooperative work, Introduction, Sections 2.1, 3 and 5 are related to Annunziata de Felice; Section 2.2, 4, 6 and Conclusions are related to Angelamaria De Feo.

tourist destination that should be valorized to boost the local economy and make its development sustainable. As highlighted by the first mission of the National Recovery and Resilience Plan (PNRR), innovation, digitalization, but above all, education are the objectives to invest in to enhance industrial tourism and overcome the difficulties that the tourism sector has faced during the years of the pandemic. The paper is structured as follows: Section 2 presents the main literature related to the socio-economic choices of the tourist; Section 3 reports the data related to tourist's choices in Apulia; Section 4 considers the industrial tourism characteristics and we conduct an empirical analysis on Apulia in Section 5. In Section 6 we consider the role of training in industrial tourism. Section 7 concludes.

2. The Choice of the Tourist-Consumer: The Related Literature

2.1 Economic Issues

According to neoclassical theory, economic problems are determined by economic laws known to individuals but not directly controlled by them. At the same time, economic agents feel the need to understand these laws in order to make rational choices. Once the principle is established that the economic agent, in order to satisfy their needs, turns to the market by demanding a quantity of goods or services that allow them to achieve maximum satisfaction, taking into account the constraints imposed by the financial constraint, it is assumed that the subject itself is characterized by a so-called absolute rationality for every decision. The term "rational" refers to an economic agent conceived as the "homo oeconomicus" (Caruso, 2012), who possesses perfect information acquired at no cost, experiences no uncertainty, and operates in an environment that is clearly and certainly defined. He is rational if, after considering all the information available to him, he acts in a manner that maximizes his choice.

In this scenario, the equality of weighted marginal utilities represents the equilibrium condition of the consumer who is not induced to change his decisions unless the initial assumptions change, namely tastes, income, or prices of products. In addition to being "rational," another characteristic attributed to the consumer is to be "isolated," meaning to act autonomously and without being influenced by other agents or the environment in which he acts. In this perspective, it follows that an economic agent capable of operating within a specific social environment and not being influenced in their choices and purchases by other individuals who frequent the same environment will not be subject to external conditioning. If all this were true, people would not have any doubts or be influenced by their choices. However, consumers not only have doubts, but are also influenced by their emotions, the events of the surrounding reality, the social environment and events (Veblen, 1899). Indeed, during the decision-making process, an individual's rationality is hindered, influenced, and limited by the information received and possessed, cognitive constraints, and the amount of time available to make decisions (Simon, 1957).

Mass media and positive or negative messages play a crucial role in influencing consumer decisions and their lifestyles. In this manner, the individual is influenced not only by the surrounding environment but also by the beliefs created by their own mind. Therefore, it is not possible to apply rigid and deterministic models to consumer behaviour because the information to which he is exposed and by which he can be influenced is potentially infinite.

2.2 Social and Psychological Issues

In this perspective, and according to studies in tourism psychology, tourists' motivation in choosing a holiday is determined by a multitude of factors, including the search for health and wellness, the growth of social prestige, the need for social interaction (Mohsin, 2005), the desire to explore places and cultures and the desire to escape from everyday life. However, it is necessary to distinguish between the push factors of socio-psychological nature that explain the desire to travel (travellers' needs and interests) and the pull factors, which are instead linked to the chosen destination.

The choice of destination is also influenced by its "image," which is the result of the interrelation between factors related to marketing, personality, and characteristics of the tourist such as gender and age (Hosany et al., 2006). Travel is a product of an immaterial nature, a "relational good" whose evaluation primarily relates to the emotional sphere. Sociology analyzes and describes social relationships and behaviours that influence the consumption of tourist products.

The different sociological approaches focus on the multiple aspects that contribute to defining the multidimensionality of the tourist experience, ranging from the study of territorial organizational choices to

the classification of various types of tourists, to the relationship between tourists and "host communities" (Ragone, 1998).

"Tourist consumption" can also be considered a means to represent the status of the higher social classes "the majority develops the aspiration to get as close as possible to the forms chosen by the elite, and the latter is encouraged to introduce distinctive choices" (Savelli, 2012: 9).

The economic, sociological, and psychological perspectives used to analyze the choice of tourist consumers thus demonstrate the complex, multidimensional, and nonlinear nature of purchasing a travel experience. The extreme variability and individualization of tourist demand requires human resources capable of responding to these needs by personalizing services and focusing on quality.

The use of Artificial Intelligence to process Big Data offers the possibility to track feelings and needs of tourists (Ciccarelli et al., 2017). Simple operations such as booking a trip online and reviewing visited places on a platform represent valuable sources of information about tourists' preferences.

During the Covid-19 pandemic, digital communication and marketing became increasingly important. Customers became more demanding and intolerant of imprecise information and long waiting times to receive it. The desire to travel primarily stemmed from the desire to meet relatives and friends rather than the desire to discover new destinations.

3. The Evolution of Tourist Choices: A Picture in Apulia

Tourism is considered an opportunity for the growth of the Italian and Apulian economies (Figure 1), although its trend appears to be the result of rather fluctuating patterns as well as in the duration and type of holiday. Tourism, in fact, is influenced not only by consumer choices, but also by external factors, unforeseen and unpredictable events, such as the Sars Covid-19 pandemic. To understand the pandemic impact on tourism, data collected by ISTAT and the Apulia Promotion Observatory needs to be considered and compared.

According to ISTAT data (2019, 2020), while Italy experienced a 2% increase in tourist arrivals (428.8 million) in 2018 compared to 2017, in 2019, this value had further increased by 1.8% (436.7 million) compared to 2018, with an average tourist stay of 3.32 nights. During the same years, Apulia recorded an increase in overnight stays, especially from foreign tourists, by 2% compared to 2017 (Figure 2). However, in 2020, due to the pandemic, it experienced a significant decline. The decrease particularly affected the international component, which fell by 13%.

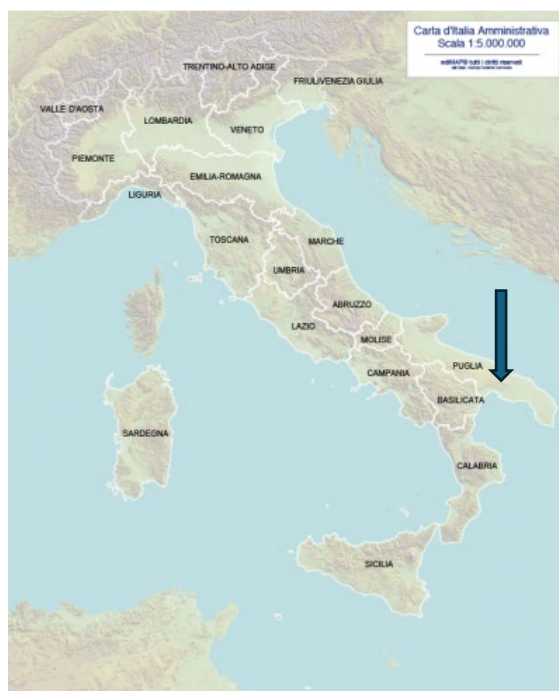
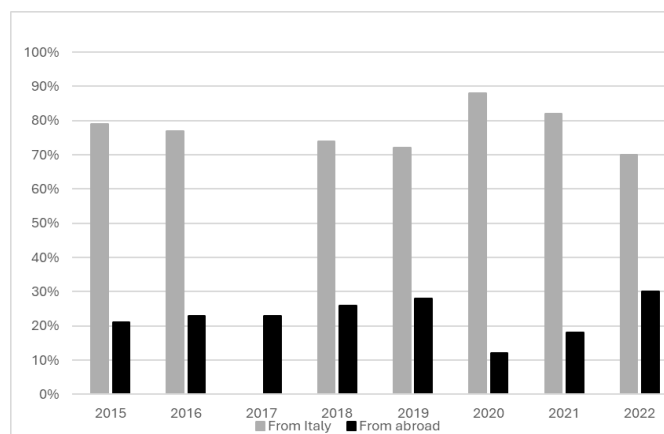


Figure 1: Italy and Apulia

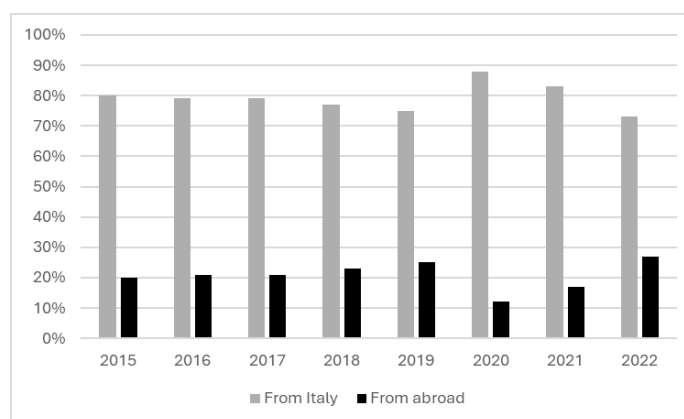


Source: Puglia Promotion Observatory, February 2023

Figure 2: Presence of tourists from Italy and abroad in Apulia

The pandemic crisis has also resulted in a deterioration of employment conditions in the sector, a contraction in the turnover of tourist businesses more pronounced than in other sectors, and an impoverishment and weakening of the area (Angeloni, 2021). This has led to numerous changes in tourist demand and behaviours.

According to a survey conducted by the Centro Studi del Touring Club Italiano (2020), during the pandemic, 72% of respondents chose destinations closer to their place of residence. They reduced visits to museums (67%) and opted for lesser-known locations (59%). They also avoided frequenting bars and restaurants (58%) and forming new friendships (42%). The most used means of transportation was privately owned cars (71%) or rented ones, as they represent a hygienically safe means and allow avoiding the risks of contagion resulting from crowds, as well as adapting to short trips to reach destinations outside traditional circuits, often not served by public transportation. After the pandemic, the tourism sector experienced a recovery. Focusing on Apulia, data from the Apulia Promotion Office-Observatory of the Region² highlighted a significant increase in arrivals and stays during the summer of 2022 (June-August) compared to 2019 and 2021, with both Italian and foreign tourists visiting Apulia³ (Figure 3). Surpassing Sicily and Sardinia, Apulia ranks as the first region in Southern Italy for tourist arrivals in 2021 and is positioned ninth among the most visited regions in Italy, up from twelfth place in 2019.



Source: Puglia Promotion Observatory, February 2023

Figure 3: Arrivals from Italy and abroad in Apulia

²The statistical data are in the Tourism Observatory of the Apulia region. <https://www.agenziapugliapromozione.it/portal/web/guest/osservatorio-del-turismo>

³ According to data from the ISTAT/Region Puglia Tourism Observatory Office, Puglia Promotion, in 2022, compared to 2021, tourist arrivals and overnight stays have increased by +9% and +5%, respectively.

The most visited destination was Vieste, followed by Ostuni, Monopoli, Ugento, Polignano, and Gallipoli.

In 2022, the recovery in the tourism sector in Apulia compared to the pre-pandemic situation marks a growth of 2% in visitor numbers. In addition, the number of employees in 2022 increased by 10% compared to 2019, while the number of businesses grew by 6%.

Thus, the key to understanding the success of the tourism sector in Apulia is tied to a series of choices such as the sustainability, the identity of the places, the ability to satisfy demands, and the attractiveness, especially culturally and maritime, of the territory.

4. The Industrial Tourism

Globalization has marked a significant change in tourism demand, increasingly oriented towards the enhancement of the experiential dimension where the psychological-perceptual aspect prevails over the physical-material one. Tourists are seeking experiences that engage their emotions and minds.

Therefore, the geographical location represents the framework within which experiences are situated. Touristic offerings oriented towards *experiential marketing* (Pine and Gilmore, 2015) require, in addition to providing goods and services, the ability to interpret the customer's most intimate and sometimes hidden needs, thus creating engagement.

The key to success in the tourism sector in Apulia is linked to a series of choices that align with sustainability, the identity of the locations, attractiveness, and the ability to listen to market demands.

Industrial tourism, a specific type of experiential tourism, already widespread in the United Kingdom since the 1950s to explore the remnants of the industrial revolution (Badia and Ruggiero, 2019), could represent an interesting pathway to enhance the tourism development in Apulia.

Sustainability and diversification of supply are the main strengths of this tourism linked to the world of industrial and artisanal production (Calabrò, 2009). It gives rise to an innovative form of business compared to traditional ones, aimed at creating value for customers, regional growth, and relationships at territorial, national, and international levels, also through the contribution of event organizers such as wedding planners.

The "Living Industry Tourism" stems from the valorization of local industrial archaeological heritage (Badia and Ruggiero, 2019). Abandoned factories, disused stations, or fortified farms tell the story and development of a civilization that, despite enduring countless defeats, has managed to redeem itself with ingenuity and creativity from a sometimes-hostile nature.

In 2019, Apulia ranked 18th in the prestigious The New York Times' list of 52 Places to Go, not only for its beaches but also for its Baroque architecture, fortified farmhouses, and wine culture. Therefore, it is important to enhance the network of corporate museums, strengthen synergistic relationships at the territorial level, and propose immersive itineraries that enhance Apulia's cultural identities and celebrate the connection between history, architecture, natural landscapes, and local production realities.

The "Mente Locale" project of the Apulia Region aims to "recover and convert underutilized and/or no longer used real estate assets for the purpose of local public transport services, social, environmental, tourist-cultural, territory promotion, and sustainable mobility, focusing on giving new life to abandoned" (Gattullo, 2019) or underutilized stations along the routes of Ferrovie Sud Est and Ferrovie Appulo Lucane (Mente Locale, 2013).

The systemic vision driving the project aims to transform the stations into places where various types of sustainable tourism converge, including cycle tourism and slow tourism, creating circuits where landscape assets, cultures, agricultural products, and traditions of neighbouring areas can be enhanced, thus creating new job opportunities for local populations linked to the realization of cultural events, artistic activities, and commercial ventures (Salustri and Cocco, 2022).

5. The Social and Economic Dimension of Industrial Tourism: An Empirical Analysis in Apulia

Following the guidelines of the European Commission, which developed a "European Tourism Indicator System" (ETIS) in 2013, revised in 2016, we measured the social and economic dimensions of tourism in Apulia. Each dimension is the average of a set of elementary indicators previously normalized using the Min-Max method to bring the values within the 0-1 range.

5.1 Dimensions and Indicators

The economic dimension, relevant for considering the impact of tourism on the economic growth of the area, is measured through six indicators (Table 1). Four are related to tourism demand and include: tourist spending per night; average length of stay; occupancy of tourist accommodations; average daily tourist spending. The other two indicators, relating to the number of facilities and beds, measure the tourist supply and the quality of tourist services. In this case, the expenditure per night is an indicator of the tourist volume of a destination, while the average length of stay and the number of visitors represent the performance of tourist enterprises (European Commission, 2016). The indicator related to expenditure should be inverted in its value, because a higher expenditure should be interpreted as a lack of performance (Baldazzi et al., 2016).

The social dimension measures the level of crowding per destination through the tourist density indicator, which provides an understanding of the tourist load that a territory must bear and the cultural and museum heritage that have attracted tourists in recent years. We use two indicators: museum heritage per 100 square kilometers and the relevance of cultural heritage. The indicator related to the tourist density should be inverted in its value since it has a negative effect, and it is related to the tourist load (Table 1).

Table 1: Economic, Social and Cultural dimension

DIMENSION	CRITERI	CODE	INDICATOR	Source	Year	UNIT OF MEASURE
Economic dimension	Tourism flow by destination	A.1	Nights spent by tourists	Infocamere Puglia	2022-23	Euros
		A.2	Average length of stay	ISTAT	2022	Number of days
		A.3	Occupancy of tourist accommodation establishments	ISTAT	2022	Number
	Tourism flow by destination	A.4	Average daily tourist spending	Infocamere Puglia	2022-23	Euros
	Tourism supply by destination	A.5	Number of establishments	ISTAT	2022	Number

B. Social and cultural dimension	Measures the tourist crowding level by destination and the museum cultural	B.1	Tourism Intensity	ISTAT	2022	The ratio of nights spent at tourist accommodation establishments relative to the total permanent resident population of the area.
	heritage	B.2	Museum heritage relevance	ISTAT	2021	Unit per 100Km ²
		B.3	Relevance of cultural heritage	Puglia Promozione	2022	Number

5.2 Results

Table 2 shows the results. Considering the economic dimension, tourism has a positive impact on the economic growth of the area, particularly in the province of Lecce, where the indicator reaches a value of 0.61. The presence of tourists in Lecce, in fact, in 2022, after the decline due to the pandemic, begins to grow by approximately 9% compared to 2019.

Results related to the social and cultural dimension show the provinces of Bari with its medieval itineraries and the Trulli of Alberobello, and BAT with the Cathedral and Castel del Monte (UNESCO site) in the top positions.

On the contrary, in the provinces of Foggia and Lecce, tourist overcrowding has a negative impact, especially during July and August, and is above the regional average. The protection and enhancement of artistic and cultural heritage are the centre of territorial development policies, and there are PNRR projects to regenerate cultural sites, religious and rural heritage.

Table 2: Economic, social and cultural dimension

	A ECONOMIC DIMENSION	B SOCIAL AND CULTURAL DIMENSION
Bari	0,36	0,42
Brindisi	0,28	0,11
Foggia	0,42	0,07
Lecce	0,61	0,16
Taranto	0,25	0,30
BAT	0,33	0,67
Apulia	0,68	0,60

6. The Role of Training in the Industrial Tourism

The tourism industry is an essential component of the European Union's (EU) economy, and the EU has committed to protecting and then revitalizing this sector both before and after the Covid 19 pandemic. Among the objectives of mission one of the PNRR dated January 29, 2021, tourism and culture represent two sectors that require intervention through innovation, education, and digitalization.

According to the theory of human capital, investments in intangible resources such as education and training increase knowledge, skills, abilities, labour productivity (Cattani et al., 2021), and workforce agility (Franco and Landini, 2022). Among the human resources, training and particularly specific training is crucial for enhancing the human capital of businesses, even in the tourism sector, and contributing to its performance (Martins, 2021).

Furthermore, to enhance tourism supply in Apulia, in addition to focusing on innovative and quality training, seizing the challenges of digitalization and utilizing BIG DATA to track tourist choices should be addressed. Often, highly skilled individuals underestimate a sector that has much to offer to a region with a youth unemployment rate of 32%, significantly higher than the national rate of 23.7% (Regione Puglia, 2023).

«In the past decade, while the contribution of the tourism sector to the global GDP continued to grow, the youth employment rate in the sector has progressively decreased. There is a clear need for policies capable of promoting the development of high-quality training programs and contributing to creating a positive perception among new generations of the employment opportunities in the tourism industry» (WTTC, 2019: 1-7)⁴.

An important role in the training of new professional profiles lies with the university, which through projects and partnership initiatives with businesses, could ensure training more in line with the needs of the sector. This could include the creation of new degree programs and the activation of pathways oriented towards hospitality professions.

The model of hospitality schools in Switzerland is particularly interesting, as it focuses on students acquiring both technical-professional and soft skills, such as empathetic abilities. These are genuine pedagogical enterprises where classroom work alternates with on-the-job training, meaning students work in the restaurant or hotel associated with the school. Companies are highly involved with the academic world in designing these training programs.

Another strength of hospitality schools lies in their innovative methods, characterized by short and remote sessions that focus on problem-solving and the application of knowledge in real work contexts. The acquisition of digital competence goes beyond mere literacy based on technical skills to encompass understanding the ethical and sustainability implications of digital device usage, playing an important role in training tourism professionals. Students transitioning from end-users to managers of technological environments learn to manage communication and their online presence critically, ethically, and consciously (Morellato, 2014).

⁴World Travel & Tourism Council, Generating Jobs for Youth, 2019

Digital competence, promoting a creative approach to culture and knowledge, allows for experimentation using software platforms, new strategies, and ways of accessing resources, ensuring the development of the tourism industry while respecting privacy regulations and copyright laws.

The experiential-collaborative approach to learning and teaching, placing students at the centre of the learning process according to the constructivist paradigm, engages them more actively than traditional transmission methods (Polillo, 2013). This learning mode is based on interdependence among students, where each student contributes to the group, which is essential to the group's success (Johnson and Johnson, 1994). The teacher acts as a facilitator, providing instructions for activities (Cheng, 2009), and co-constructing knowledge with the students. In the future, digital competence with the help of artificial intelligence could lead tourism professionals to manage and design immersive journeys in the metaverse aimed at inspiring tourists' choices through virtual tours or enabling travel experiences for those who cannot undertake physical trips.

7. Conclusion

The Covid-19 pandemic has brought numerous changes in terms of tourism choices. Pre-packaged tourism, which has long given way to individualized, diversified, and personalized choices, is now definitively on the decline. Tourist consumers are increasingly inclined to follow their own inspirations and needs, constantly seeking new experiences.

Apulia has gained numerous international awards as a tourist destination, distinguished by the high number of Italian and foreign tourists present. The pandemic event has also been successfully overcome, considering the increase in tourist arrivals and the number of employees in the sector. The idea of wild and rugged places where "history dies" seems to have been definitively erased.

An interesting driver of development is the industrial tourism, a specific type of experiential tourism industrial tourism is characterized not only by sustainability but also by the transformation, through innovative entrepreneurial ideas, of isolated and forgotten places into attractive and profitable tourist destinations.

The growth and development of the tourism sector requires increasingly comprehensive and complex professionalism. Decoding, interpreting, and understanding the needs and well-being requests of post-tourists, preferably anticipating them, involves numerous knowledge, competencies, and abilities. The integration of digital competence, with the application of collaborative methodologies in educational training paths, represents valuable tools to prepare tourism professionals to successfully tackle the challenges of a rapidly transforming sector, which is increasingly competitive, but at the same time needs to be valued and protected.

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