

Proceedings of the
8th International Conference on
Tourism Research
JAMK University of Applied Science,
Jyväskylä, Finland
24-25 April 2025



**Dr Minna Tunkkari-
Eskelinen**

A conference managed by ACI, UK

Proceedings of the 8th International Conference on Tourism Research

ICTR 2025

24-25 April 2025

Hosted By

**The JAMK University of Applied Science,
Jyväskylä, Finland**

Edited by

Dr Minna Tunkkari-Eskelinen

The JAMK University of Applied Science,

Jyväskylä, Finland

Copyright the authors, 2025. All Rights Reserved.

No reproduction, copy or transmission may be made without written permission from the individual authors.

Review Process

Papers submitted to this conference have been double-blind peer reviewed before final acceptance to the conference. Initially, abstracts were reviewed for relevance and accessibility and successful authors were invited to submit full papers. Many thanks to the reviewers who helped ensure the quality of all the submissions.

Ethics and Publication Malpractice Policy

ACIL adheres to a strict ethics and publication malpractice policy for all publications – details of which can be found here:

<http://www.academic-conferences.org/policies/ethics-policy-for-publishing-in-the-conference-proceedings-of-academic-conferences-and-publishing-international-limited/>

Self-Archiving and Paper Repositories

We actively encourage authors of papers in ACIL conference proceedings and journals to upload their published papers to university repositories and research bodies such as ResearchGate and Academic.edu. Full reference to the original publication should be provided.

Conference Proceedings

The Conference Proceedings is a book published with an ISBN and ISSN. The proceedings are submitted to a number of accreditation, citation and indexing bodies including Clarivate ISI Web of Science and Elsevier Scopus.

Author affiliation details in these proceedings have been reproduced as supplied by the authors themselves.

Since 2022 these proceedings are open access and freely available for all to read from The Electronic version of the Conference Proceedings is available to download from <https://papers.academic-conferences.org/index.php/ictr>. The Conference Proceedings for previous years can be purchased from <http://academic-bookshop.com>

E-Book ISBN: 978-1-917204-36-1

E-Book ISSN: 2516-3612

Print ISBN: 978-1-917204-35-4

Print ISSN: 2516-3604

Published by Academic Conferences International Limited

Reading, UK

+44 (0) 118 324 6938

www.academic-conferences.org

info@academic-conferences.org

Contents

The papers in these proceedings were presented at the conference in sessions organised by topics but are presented here by type of paper and then alphabetically by lead author surname.

About the Proceedings of the 8th International Conference on Tourism Research	viii
Preface	xi
Biographies of Chairs and Keynote Speakers	xii
Review Committee	xiv

Academic Papers

<i>The TourX Project Visit to China: A Comprehensive Study on Tourist Perceptions</i>	
Manuel, Antonio, Roger, Emanuela, Frederico	1-11
<i>Longitudinal Dynamics of MSME Growth in Iloilo, Philippines: Assessing the Economic and Social Ripple Effects of Domestic Tourism</i>	
Ma. Gerlia Blanza	12-20
<i>Assessing an Eco-Destination Management Structure – a Case Study</i>	
João Carvalho, Sónia Nogueira, Luís Pacheco	21-29
<i>Digital Marketing of Tourism Destinations: The case of Lisbon</i>	
Cândida Silva, Elisa Castro-Neves, Beatriz Soares, Cláudia Mokdisse	30-39
<i>Influence of Food Bloggers in Promoting Sustainable Gastronomic Tourism Empowering Rural Economies</i>	
Ma Flora Collado	40-46
<i>From Virtual to Reality: Enhancing Cultural Tourism Through AI, VR, and the Metaverse</i>	
Pedro Correia	47-55
<i>Embracing History and Cultural Heritage Through the Chinese Hanfu Costume Tourism</i>	
Xin Cui, Ziqian Song, Xiaoyun Tang	56-63
<i>The Evolution of Tourism in COVID Times: A Case Study</i>	
Annunziata de Felice, Angelamaria De Feo	64-72
<i>International Economic Relations and Sustainable Tourism: The Case of Greece</i>	
Georgios A. Deirmentzoglou, Eleni E. Anastasopoulou, Eirini Vlassi	73-80
<i>Presenting a Model to Improve the Healthcare Sector to Attract Medical Tourism</i>	
Michaelle Deonarain	81-89

<i>Memorable Tourism Experience in Hot-Air Ballooning: Its Antecedents and Consequences</i>	
Yusuf Dündar, Cemal Ersin Silik, İsa Yayla	90-98
<i>Participatory Governance: Providing Tools for Local Communities to Engage in Tourism Management</i>	
Patricia Esteves, Dora Gomes, Alexandra Lavaredas, Paulo Almeida	99-108
<i>South African Domestic Tourists and Local Foods: Measuring the Four Dimensions of the Experience Economy</i>	
Hennie Fisher, Gerrie Du Rand, Richard Hay, Zelmari Coetzee	109-117
<i>Enhancing Event Quality Through Mystery Shopping: Integrating Theoretical and Practical Perspectives</i>	
Johanna Heinonen, Maria Murto	118-125
<i>The Relationship Between the Perception of Environmental Pollution with the Tourist Experience of Visitors to Chimbote Bay</i>	
Marcia Cabala Hernández, Cecilia Rivas-Medina, Rocio Salas Laines, Sandra Cherro Osorio	126-133
<i>Driving Transformation: Increasing Customers' Willingness to Pay in Transformative Travel Services</i>	
Henri Karppinen, Katja Pasanen	134-141
<i>The Role of Film Festivals in Promoting Cultural Identity of Tourism Destinations</i>	
Alexandra Meira Lavaredas, Dora Gomes, Francisco Dias	142-151
<i>Evaluating the Current Developments and Future Prospects of Agritourism: The Case of Cyprus</i>	
Stelios Marneros, Andreas Efstathiades, Nikolaos Boukas, George Papageorgiou	152-161
<i>Circular Economy in the Restaurant Sector: Do Practices Go Hand in Hand?</i>	
Antonio Melo, Daniel Azevedo, Susana Silva, Goretti Silva, Ana Figueiredo, Carla Melo	162-165
<i>Industrial Tourism in Small and Medium-Sized Industrial Enterprises: Challenges and Opportunities</i>	
Zulmira Montenegro, Jorge Marques, Cristina Sousa	166-176
<i>Green Leadership, Motivation, Commitment and Performance in the Operational Teams of the Portuguese Hospitality Industry</i>	
Raquel Moura, José Carlos Dias Rouco, Mafalda Patuleia	177-185
<i>Recovering Together: A Moderated Mediated Analysis of Co-Created Recovery on Repatronage Intentions</i>	
Kyrie Eleison Muñoz, Agasen Aldrin, Mark Chris Lapuz	186-193

<i>Policy Approaches to Sustainable and Circular Economy Tourism: Comparative Case Studies of Japan and China</i>	
Koon Murakami	194-204
<i>Exploring Sustainable Tourism Research Trends: A Literature Review of the Last Decade</i>	
Elisabete Nogueira, Zulmira Montenegro	205-213
<i>A Model for Monthly, Local-Level Airbnb Changes Using Public Dataset</i>	
Youngjun Park, Jisun An, Dongman Lee	214-223
<i>Exploring Portugal's Wine Tourism: Tradition, Culture, and Future Opportunities</i>	
Teresa Alexandra Azevedo Pataco, Mónica Oliveira	224-233
<i>The Critical Role of Cybersecurity Education in Health Tourism</i>	
Jyri Rajamäki, Paulinus Ofem, Annika Kallio, Miia Vakkuri	234-242
<i>Butterfly Effect Shaping the Tourism Ecosystem: A Case Study of Border Security and Tourism from Strandzha Nature Park</i>	
Rositsa Röntynen, Snezhanka Ovcharova	243-252
<i>The Profile of the Finnish Rural Tourism Developer: An Unexplored Realm</i>	
Rositsa Röntynen	253-261
<i>Second Homes and Potential Impacts on Return Migration and Rural Tourism Development</i>	
Rossana Santos	262-269
<i>Understanding Tourist Experience in Mountain Hotel Accommodation: A Qualitative Assessment of Online Reviews</i>	
Mehlika Saraç, Çağatan Taşkın	270-277
<i>Revenue Assessment of the Current Tourism Industry of Bandarban Hill District, Bangladesh, and its Economic Impact on the Local Indigenous Community</i>	
Shaing Shaing	278-288
<i>The Model of Social Sustainability in Music Festivals: An Empirical Contrast</i>	
Siles David, García-Sánchez Antonio, Vázquez-Méndez María del Mar	289-298
<i>How Human Resources Management Practices Affect Employee Satisfaction and Motivation: A Study in the Hospitality Sector</i>	
Susana Silva, Marcia Gonçalves	299-304
<i>Erasmus Mobility: Fostering Cultural Sensitivity Through Youth Exchange</i>	
Goretti Silva, Mariana Oliveira, Alexandra I. Correia, Maria José Brito	305-313

<i>What Skills are Required for Sustainable Leadership in Hospitality?</i> Susana Silva, Mónica Oliveira, Candida Silva	314-321
<i>Social Media as a Tool to Promote Jyväskylä as A Tourism Destination</i> Cândida Silva, Ana Moutinho Ferreira, Susana Silva	322-330
<i>Co-Creation in Wellness Tourism: Insights from Thailand</i> Varintra Sirisuthikul, Pichai Pusumpun	331-339
<i>Social Impacts of Tourism in the Pantanos de Villa Wildlife Refuge (Peru)</i> Sophia Es'pinoza, Nathaly Gonzales, Brendali Carrillo	340-346
<i>Dynamic Pricing and Seasonality: Insights from Short-Term Rental Market</i> Patricio Torres-Luque, Esnil Guevara, Pablo Esteban Torres Luque, Frida Yoshimara Carpio Clemente	347-355
<i>The Stakeholders of Voluntourism, Community-Based Tourism, and Regenerative Tourism: An Integrated Framework</i> Minna Tunkkari-Eskelinen, Rositsa Röntynen	356-364
<i>Development of Health Tourism Promotion – The Case of Kvarner Health Tourism Cluster</i> Daniel Zadro, Hrvoje Jakopović, Andrija Petar Bošnjak	365-374
<i>On the Road to Transformation: How Self-Drive Tourism Transforms Travelers</i> Xueying Zang	375-381
<u>PhD Papers</u>	
<i>Virtual Reality for Responsible Tourism: A Case Study of Jordan's Coral Reef</i> Anita Andziak	383-392
<i>Factors Influencing Vietnamese Consumers' Decisions Regarding Green Hotels</i> Phi Hung Truong, Ha Thanh Nga , Nguyen Pham Minh Thu	393-401
<i>The Influence of Product Placement on Luxury Tourism: An S-O-R Model Approach</i> Kim Anh Dao , Truong Phi Hung , Hoang Duc Sinh	402-410
<u>Masters Papers</u>	
<i>Looking at two decades of OTA research: A Bibliometric Approach</i> Kamran Nazmabadi	412-421
<u>Non-Academic Papers</u>	
<i>Titanic Challenge: Ethical Dilemmas in Deep Sea Exploration</i> Melvin Marsh	423-427

Work in Progress Papers

Adopting Social Media Influencers in Boutique Hotel Marketing: A Case Study
Norman AU, Hailey Shin 429-431

The Role of B-Corp's in the Development of Tourism Businesses in South Africa
Dr Christopher J Moon 432-438

Tourism Through Pop Culture: A Conceptual Model Rooted in Japanese Cultural Events
Filipe Segurado Severino 439-442

Late Submissions

How Destination Narratives Influence Visit Intention
Luísa Augusto, Sara Santos, Sónia Ferreira, Pedro Espírito Santo 444-450

Use of online Space and Social Media in Hotel Resorts
Kamil Pícha, Roman Švec, Petra Martišková 451-456

About the 8th International Conference on Tourism Research

The International Conference on Tourism Research (ICTR) is an established academic conference that has been held annually for eight years, providing a significant platform for scholars, researchers, and professionals to share and discuss the latest developments, challenges, and innovations in the field of tourism. The conference is characterized by its broad interdisciplinary scope, aiming to advance the understanding of tourism as a dynamic and multifaceted phenomenon with economic, social, cultural, and environmental dimensions. The conference serves as a vital forum for advancing the understanding of tourism and its multifaceted impacts. Through its comprehensive coverage of topics and its commitment to fostering academic and professional dialogue, the conference contributes to the ongoing development of tourism research and practice, with an emphasis on sustainable and responsible tourism.

Aims and Scope

The primary aim of the ICTR is to foster academic and professional dialogue on the diverse aspects of tourism, promoting research that contributes to the sustainable development of the tourism industry worldwide. The conference seeks to bridge the gap between theory and practice by encouraging contributions that offer both theoretical insights and practical implications. It also aims to provide a collaborative environment where participants can engage in knowledge exchange, network with peers, and explore emerging trends and issues in tourism.

The scope of the conference is broad and inclusive, covering various areas of tourism research. It welcomes contributions from multiple disciplines, including hospitality, economics, management, sociology, geography, cultural studies, environmental science, and technology, reflecting the complex and interdisciplinary nature of tourism studies. The Proceedings of the 7th International Conference on Tourism Research 2024 includes academic research papers, PhD research papers, Masters Research papers and work-in-progress papers, which have been presented and discussed at the conference. The proceedings are of an academic level appropriate to a professional research audience, including graduates, postgraduates, doctoral and post-doctoral researchers. All papers have been double-blind peer reviewed by members of the Review Committee.

Topics Covered

The call for papers for the ICTR conference asked for contributions that considered the following topics. In addition the committee welcomed papers on a number of specialist mini-tracks which can be seen at the end of this list.

1. Tourism Management and Marketing:

- strategies and practices involved in managing and marketing tourism destinations and businesses
- destination branding
- digital marketing
- customer experience management
- the role of social media in shaping tourist behaviour.

2. Sustainable Tourism:

- sustainable tourism practices
- mitigating the environmental impact of tourism
- ecotourism
- responsible tourism

- the management of natural and cultural resources
- the balance between tourism development and environmental conservation.

3. Tourism Economics:

- the economic impacts of tourism at local, regional, and national levels
- tourism demand modelling
- the economic contribution of tourism to GDP
- the role of tourism in economic development
- the challenges of tourism taxation and pricing.

4. Cultural and Heritage Tourism:

- culture and heritage in tourism
- leveraging historical and cultural assets for tourism development
- the preservation of cultural heritage sites
- the commodification of culture
- the impact of tourism on local communities and traditions.

5. Tourism and Technology:

- the integration of technological innovations in the tourism industry
- the role of artificial intelligence, big data analytics, virtual and augmented reality in tourism experiences
- the impact of the sharing economy on traditional tourism models.

6. Tourism Policy and Governance:

- the role of government and international organisations in shaping tourism policy and regulation
- tourism planning
- public-private partnerships
- tourism governance structures
- the impact of global tourism policies on local practices.

7. Tourism and Globalization:

- the effects of globalization on tourism
- the homogenization of tourism experiences
- the challenges and opportunities presented by international tourism
- the role of tourism in promoting global understanding and cultural exchange.

8. Tourism and Society:

- the social and cultural implications of tourism development
- the role of tourism in shaping social identities
- the ways in which tourism influences local communities including overtourism and tourist induced gentrification
- the ethical dimensions of tourism

9. Tourism Education and Training:

- curriculum development
- the role of vocational training in tourism
- the challenges of meeting industry needs through educational programs

10. Crisis Management in Tourism:

- the vulnerability of the tourism industry to natural disasters, political instability, and pandemics
- strategies for crisis management and recovery
- risk assessment and resilience building
- the long-term impacts of crises on tourism destinations

Experts in the field proposed mini tracks on the following topics. Papers accepted on these topics after the double-blind peer review process were presented as mini tracks at the conference and are also published in these proceedings.

- Sport and Event Tourism
- Sustainable Tourism and the Circular Economy
- Entrepreneurship and Tourism

The programme from the 2024 conference can be downloaded from [here](#) and full details about the conference can be seen from the conference website:

<https://www.academic-conferences.org/conferences/ictr/>

ICTR Preface

These proceedings represent the work of contributors to the 8th International Conference on Tourism Research (ICTR 2025), hosted by the JAMK University of Applied Science, Jyväskylä, Finland on 24-25 April 2025. The Conference Chair was Dr Minna Tunkkari-Eskelinen from the JAMK University of Applied Science, Jyväskylä, Finland.

ICTR is a well-established event on the academic research calendar and now in its 8th year the key aim remains the opportunity for participants from diverse backgrounds to share ideas on a wide range of topics pertaining to tourism research and meet the people who hold them. The scope of papers ensured an interesting two days. The subjects covered illustrate the wide range of topics that fall into this important and ever-growing area of research. Today, more than ever, there is a need for research and scientific guidance as the tourism sector struggles to cope with the consequences of the Covid-19 pandemic, global inflation, socio-political turbulences, climate change and disaster risk.

The conference was opened with a keynote presentation by *Prof. Stefan Baumeister* University of Jyväskylä, School of Business and Economics on the topic of *The Role of Transportation in Sustainable Tourism*. The second day of the conference opened with an address by *Dr Mari Partanen*, Jamk University of Applied Sciences about *Social Innovations for Inclusive Development in Tourism*.

With an initial submission of 114 abstracts, after the double blind, peer review process there are 40 Academic research papers, 5 Case Studies, 3 PhD research papers, 1 Masters Research papers and 4 work-in-progress papers published in these Conference Proceedings. These papers represent research from Austria, Bangladesh Bulgaria, Canada, Chile, China, Croatia, Czech Republic, Finland, Hong Kong, Iran, Ireland, Italy, Japan, Latvia, Mexico, Morocco, Mozambique, Peru, Philippines, Portugal, South Africa, South Korea, Spain, Switzerland, Thailand, The Netherlands, Türkiye, UAE, United Kingdom, United States and Vietnam.

We would like to thank everyone who participated in this conference

Dr Minna Tunkkari-Eskelinen
JAMK University of Applied Science, Jyväskylä,
Finland
April 2025

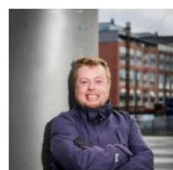
Biographies of Chairs and Keynote Speakers

Conference and Programme Chairs



Dr. Minna Tunkkari-Eskelinen works as a principal lecturer in Tourism Management Program at the Jamk University of Applied Sciences. She has spent most of her academic career in the field of entrepreneurship and sustainable tourism development integrating research into practical dialogue with the industry representatives. Lately, her emphasis at work is responsible tourism topics including regenerative, transformative and volunteering tourism.

Keynote Speakers



Prof. Stefan Baumeister is Professor at the University of Jyväskylä, School of Business and Economics acting as a teacher and instructor in the Corporate Environmental Management Master's Degree Program. From 2022, the Program Director of the Corporate Environmental Management Master's Degree Program. He is also the School of Business and Economic's Education Development Committee. In February 2022 Stefan was awarded the Title of Docent in Aviation from the Faculty of Built Environment at Tampere University. Stefan's research has appeared in leading journals and widely in the media and many regional Finnish newspapers. Stefan also acts as an advisor to the Government of Finland in questions related to transportation policies.



Dr. Mari Partanen is a tourism geographer and a cultural anthropologist specialising in changing localities and multi-scalar tourism impacts. Dr Partanen's research has focused on social innovations, inclusive development in tourism, community resilience-building and sustainability questions, extending to human-environment relationships, virtual tourism and regenerative leadership. Her work brings out the nuances of locality and inclusive development, often by gathering in-depth, design-oriented ethnographic knowledge about the field. She works as a researcher in Jamk University of Applied Sciences and is a member of Eudres Research Centre of Excellence for Sustainable Business Models and a board member of The Finnish Society for Tourism Research

Mini Track Chairs



Dr. Tan Lay Hong currently holds the position of Senior Lecturer at the Faculty of Technology Management and Technopreneurship at Universiti Teknikal Malaysia Melaka (UTeM), Malaysia. Her fields of expertise include Service Marketing, Service Quality, Quality Management, Technology Management and Sustainable Management. In addition to her academic pursuits, Dr. Tan has accumulated several years of lecturing experience at various colleges and prestigious universities. Additionally, Dr. Tan has gained extensive industrial experience, particularly in the food manufacturing sector. Furthermore, Dr. Tan's involvement in government projects highlights her ability to engage in public-sector initiatives.



Dr Christopher Moon is a multiple award-winning eco and social entrepreneur and Senior Lecturer in eco-entrepreneurship at Middlesex University. He has a PhD from Imperial College and is a fellow of the RSA, HEA and EEUK. He was formerly Head of Sustainability at two companies and teaches sustainable tourism, sustainable business and entrepreneurship and sustainability. He has over 100 publications including in the International Journal of Hospitality Management 2018. Chris has taken tourism students to Mallorca on study tour regularly where Middlesex has an Erasmus agreement with UIB, Palma. He has presented at UIB international week and was interviewed by Spanish TV on sustainable tourism. He is Visiting Professor at NUP, Cyprus.



Prof. Rossana Santos is full time professor in College of Technologies and Management of University of Madeira. She holds a PhD in Tourism, a master's degree in Tourism Management and Development and a BA in Tourism. She is integrated member of the centre for Tourism Research, Development and Innovation - CITUR (Pole Madeira). She is also member of the Commission for Inclusion and Equality of University of Madeira. She has been professor and director of higher education courses in tourism and hotel management

ICTR Conference Committee

Dr Sara Abdoh, Faculty of Applied Arts, Egypt; Mira Ahtila, Jyväskylä Educational Consortium, Jyväskylä, Finland; Dr Mohammad Alazaizeh, Zayed University, UAE; Prof Paulo Almeida, Leiria Polytechnic, Portugal; Carmen Dolores Álvarez-Albelo, Institute of Social Sciences and Tourism, University of La Laguna, Spain; Dr Suzanne Amaro, Polytechnic Institute of Viseu, Portugal; Dr Maria Elena Aramendia-Muneta, Universidad Pública de Navarra, Spain; Prof Alina Badulescu, University of Oradea, Romania; Dr Hilary Kennedy Nji Bama, Cape Peninsula University of Technology, South Africa; Prof Neeta Baporikar, HP-GSB, Namibia University of Science and Technology, Namibia; Prof Dimitrios Belias, Department of Business Administration, University of Thessaly, Greece; Daniel Binder, FH JOANNEUM University of Applied Sciences, Graz, Austria; Prof José Luís Braga, Instituto de Estudos Superiores de Fafe, Portugal; Prof Zelia Breda, University of Aveiro, Portugal; Prof Acma Bulent, Anadolu University, Turkey; Dr Sancha Campanella, ISAL - Instituto Superior de Administração e Línguas, Portugal; Prof António Cardoso, University Fernando Pessoa, Portugal; Prof Luísa Cagica Carvalho, Polytechnic Institute of Setúbal, Portugal; Prof Conceição Castro, Polytechnic Institute of Porto, Portugal; Petr Cech, University College of Business in Prague, Czech Republic; Prof Mohinder Chand, Kurukshetra University, India; Prof Ricardo Correia, Bragança Polytechnic Institute, Portugal; Prof Smaranda Adina Cosma, Babes-Bolyai University, Romania; Prof Teresa Costa, Business School, Polithenic Institute of Setúbal, Portugal; Prof Vânia Costa, Polytechnic Institute of Cávado and Ave, Portugal; Dr Muriel Crick, Mona School of Business & Management, University of the West Indies, Jamaica; Prof Carlos Rompante Cunha, Polytechnic Institute of Bragança, Portugal; Turan Erman Erkan, Atilim University, Ankara, Turkey; Dr Luisa Errichiello, Italian National Research Council (CNR), Italy; Dr Rosse Esparza, USIL - Universidad San Ignacio de Loyola, Perú; Lyn Fawcett, Ulster Business School, UK; Prof Paula Odete Fernandes, Polytechnic Institute of Bragança & UNIAG, Portugal; Prof Gonçalo Fernandes, Polytechnic Institute of Guarda, Portugal; Dr Pedro Ferreira, University Portucalense, Portugal; Prof Fernanda A. Ferreira, School of Hospitality and Tourism of the Polytechnic Institute of Porto, Portugal; Prof Victor Figueira, Polytechnic Institute of Beja, Portugal; Assistant Professor Diogo Goes, Higher Institute of Administration and Languages (ISAL), Portugal; Dr Roberto Gómez-Calvet, Universidad Europea de Valencia, Spain; Prof Paulo Jorge Gonçalves, Polytechnic of Porto, ISCAP and CEOS Research Center, Portugal; Dr Aleksandra Grobelna, Gdynia Maritime Academy, Poland; Dr Christiaan Hattingh, Cape Peninsula University of Technology, South Africa; Prof. dr. Oliver Kesar, University of Zagreb, Faculty of Economics & Business, Department of Tourism, Croatia; Dr Mana Khoshkam, Islamic Azad University, West Tehran Branch, Iran; Prof Joanna Kizielewicz, Gdynia Maritime University, Poland; Prof Jesuk Ko, Universidad Mayor de San Andres (UMSA), Bolivia; Prof Mortaza kokabi, Shaheed Chamran Univ, Iran; Aleksandra Kowalska, Maria Curie-Skłodowska University in Lublin, Poland; Kelly La Venture, Bemidji State University, Minnesota, USA; Dr Ramona-Diana Leon, Universitat Politècnica de Valencia, Spain; Dr Małgorzata Leśniak-Johann, Chair of Tourism and Leisure, University of Business in Wrocław, Poland; Prof Eunice Lopes, Polytechnic Institute of Tomar, Portugal; Prof Sofia Lopes, Polytechnic Institute of Leiria, Portugal; Prof Maria José Magalhães, Saint Michael's College, USA; Prof Rekha Maitra, DAV Centenary College, India; Dr Arkadiusz Malkowski, West Pomeranian University of Technology in Szczecin, Poland; Prof Carlos Peixeira Marques, University of Trás-os-Montes and Alto Douro, Portugal; Jorge Marques, Universidade Portucalense (UPT), Portugal; Dr Jose Alberto Martinez-Gonzalez, Universidad de la Laguna, Spain; Dr Jones Mathew, Great Lakes Institute of Management, Gurgaon, India; Prof Fátima Matos da Silva, Universidade Portucalense (UPT), Portugal; Dr Andrei Maxim, Faculty of Economics and Business Administration, "Alexandru Ioan Cuza" University of Iasi, Romania; Ludmila Mládková, University of Economics Prague, Czech Republic; Dr Christopher Moon, Middlesex University, UK; Prof Luís Mota Figueira, Polythenic Institut of Tomar, Portugal; Prof Dr Pedro Mucharreira, ISCE - Instituto Superior

de Ciências Educativas/UIDEF, Instituto de Educação, Universidade de Lisboa, Portugal; Prof Catarina Nadais, CEGOT, Portugal; Sónia P. Nogueira, Polytechnic Institute of Bragança, Portugal; Cristiana Oliveira, Universidad Europea de Canarias, Spain; Verónica Oliveira, IP Leiria, Portugal; Prof Elisabeth T. Pereira, DEGEIT & GOVCOPP, University of Aveiro, Portugal; Prof Raquel Pereira, ISCAP, Portugal; Prof Rita Peres, Estoril Higher Institute for Tourism and Hotel Studies, Portugal; Dr Marta Pérez-Pérez, University of Cantabria, Spain; Dr Birgit Phillips, University of Graz, Austria; Prof Nazanin Pilevari, Islamic Azad university, Iran; Prof Ana Pinto Borges, ISAG - European Business School and Research Center in Business Sciences and Tourism (CICET), Portugal; Prof Ana Pires, Polytechnic Institute of Leiria, Portugal; Dr Paula Rama-da-Silva, CEAUL/ESHTE, Portugal; Dr Makhabbat Ramazanova, Universidade Portucalense (UPT), Portugal; Prof Maria José Rios de Magalhaes, Universidade Católica Portuguesa, Portugal; Prof Ana Isabel Rodrigues, Polytechnic Institute of Beja, Portugal; Dr Susana Rodrigues, Polytechnic Institute of Leiria, Portugal; Dr Jakson Renner Rodrigues-Soares, Universidade da Coruña, Spain; Dr Ángel Rodríguez-Pallas, University of A Coruña, Spain; Prof Rossana Santos, University of Madeira, Portugal; Prof Taina Savolainen, Business School, University of Eastern Finland, Joensuu, Finland; Dr Ousanee Sawagvudcharee, Centre for the Creation of Coherent Change and Knowledge, Thailand; Prof Cândida Silva, Polytechnic Institute of Porto - School of Hospitality and Tourism, Portugal; Prof Susana Silva, School of Hospitality and Tourism, Institute Polytechnic of Porto, Portugal; Dr Ardhendu Shekhar Singh, Symbiosis International University, Pune, India; Cristina Sousa, ISCTE, Lisbon, Portugal; Prof Manuel Sousa Pereira, Instituto Politécnico de Viana do Castelo, Portugal; Dr Riccardo Spinelli, Department of Economics and Business Studies, University of Genoa, Italy; Dr Nornazira Suhairom, Universiti Teknologi Malaysia, Malaysia; Prof Vera Teixeira Vale, Aveiro University, Portugal; Anne Törn-Laapio, JAMK University of Applied Sciences, Jyväskylä, Finland; Minna Tunkkari-Eskelinen, JAMK University of Applied Sciences, Jyväskylä, Finland; Dr Desislava Varadzhakova, National Institute of Geophysics, Geodesy and Geography at Bulgarian Academy of Sciences, Bulgaria; Dr Isabel Vaz de Freitas, Universidade Portucalense (UPT), Portugal, Dr Desislava Varadzhakova, National Institute of Geophysics, Geodesy and Geography at Bulgarian Academy of Sciences, Bulgaria, Dr Isabel Vaz de Freitas, Universidade Portucalense (UPT), Portugal, Dr Joao Simoes, Polytechnic University of Tomar, Portugal, Prof Rossana Santos, University of Madeira, Portugal, Dr Lay Hong Tan, Universiti Teknikal Malaysia Melaka, Malaysia, Prof Mohinder Chand, Department of Tourism and Hotel Management, Kurukshetra University, Kurukshetra, Haryana, India, Prof Marta Amaral, Polytechnic Institute of Beja (Portugal), Portugal, Ana Sofia Duque, Polytechnic Institute of Viseu, Portugal, Prof Elisabete Nogueira, Portucalense University, Portugal, Dr Pablo Juan Cárdenas-García, University of Jaén, Spain, Prof Mafalda Patuleia, Lusófona University, Portugal, Prof Sofia Gomes, Portucalense University, Portugal, Dr Carlos Rouco, Universidade Lusófona, Portugal.

The TourX Project Visit to China: A Comprehensive Study on Tourist Perceptions

Manuel Au-Yong-Oliveira¹, Antonio Gennarelli², Roger Heinzl³, Emanuela Vizzarro⁴ and Frederico Branco⁵

¹INESC TEC, Porto Portugal; Research Unit on Governance, Competitiveness and Public Policies (GOVCOPP), Department of Economics, Management, Industrial Engineering and Tourism (DEGEIT), University of Aveiro, Portugal

²EVBB - the European Association of Institutes for Vocational Training, Brussels, Belgium

³DEHOGA Brandenburg, Germany

⁴ENAIP, Veneto, Italy

⁵Human-Centered Computing and Information Science, INESC TEC; School of Science and Technology, UTAD, Vila Real, Portugal

mao@ua.pt

antonio.gennarelli@evbb.eu

heinzel@dehoga-brandenburg.de

emanuela.vizzarro@enaip.veneto.it

fbranco@utad.pt

Abstract: This study provides an extensive examination of tourist perceptions during a visit to China, conducted within the framework of the Erasmus+ TourX project. The project includes participants from Spain, Italy, Germany, Greece, Belgium, and Portugal. Tourism is widely acknowledged as a mechanism for cultural exchange, fostering intercultural learning and broadening global perspectives. This research aims to empirically analyze the experiences and behaviors of tourists within an unfamiliar cultural environment. The findings contribute to the broader academic discourse on the role of tourism in facilitating cross-cultural engagement and its implications for the tourism industry in China.

Keywords: Tourism, Cross-Cultural exchange, Smart tourism, Digital infrastructure, Tourist perceptions

1. Introduction and Background

Tourism is not solely about visiting foreign countries and observing differences but rather about engaging with diverse cultural landscapes. The essence of tourism extends beyond leisure activities to include intellectual engagement and cultural exploration. In the European context, China remains a subject of intrigue due to its rapid economic growth and distinct socio-cultural dynamics. The predominant media narratives often present China through a Western lens, which this study seeks to assess critically.

Given the prevalence of misinformation and oversimplified representations, this research aims to evaluate China's tourism landscape based on firsthand observations. A key aspect of this analysis is the digital infrastructure that facilitates tourism, including the integration of booking systems and crowd management solutions, which effectively mitigate over-tourism. Notably, the majority of tourists in China are domestic travelers, yet inbound tourism is steadily increasing.

The article continues with a definition of the research problem and questions, followed by a bibliometric analysis, and then an analysis of the literature on China. The methodology followed is then described. Four autoethnographic narratives (written by TourX participant members) are subsequently shared and discussed.

2. Research Problem and Research Questions

The discourse surrounding China in Western media frequently portrays themes of governmental control, lack of creativity, and limited freedoms. This research seeks to address the following core question: What are the actual perceptions and experiences of tourists in China, and how do they compare to the prevailing narratives? Prior studies have shown that negative electronic word-of-mouth (eWOM) can significantly shape tourist emotions and influence avoidance behaviors (Duong et al., 2025). In particular, the case of COVID-19 highlighted how crisis-related misinformation affected China's tourism sector (Wang et al., 2024). This study investigates these themes through empirical observation and analysis.

4. An Analysis of the Literature on China

4.1 The Cultural

To write about China is to write about a myriad of cultural influences – incoming and outgoing (Amaro, 2024). This article's focus is on urban experiences and not rural ones (Zhu et al., 2024). We are in agreement with "the prosperity of this country and its hardworking and courageous people" (Wu, 2024, p.1). We see a nation that has learned from its past. Namely, "that dishonest behaviours by local governments in the past can lead to lasting adverse effects on an individual's behaviour in the form of mistrust and subsequent lower frequencies of cooperative behaviour, providing new insights on the origins of cultural differences and human behaviours by investigating the role of governments in shaping social and economic interactions." (Qiliang & Shanming, 2024, p.1061). Qiliang and Shanming (2024) explore "the long-term impact of China's Great Leap Forward (GLF) on current differences in cooperative behaviour across Chinese regions and the underlying trust channel of causality. Combining the current firm-level survey with grain yield over-reporting during the GLF era, we find that past government dishonesty regarding over-reporting in the GLF period has long-term negative consequences on people's behaviours" (Qiliang & Shanming, 2024, p.1061). Recognizing this, China is perhaps the place where foreigners may feel most safe – finding tourist lovers there rather than tourist haters (Au-Yong-Oliveira et al., 2018). Corruption is minimized in an environment where meritocracy reigns and where the best people are systematically promoted. Effective and classic economic principles are followed for added efficiency.

"Economic and political changes prioritizing economic growth and individual wealth have increased the shame associated with poverty, manifest as loss of face, low *mian* (status) and lack of *lian* (integrity)." (Yang et al., 2020, p.655). Face continues to be an important facet of Chinese society. "Chinese concepts of face can be differentiated into social face (*mianzi*) and moral face (*lian*)." (Hwang, 2012, p.265). "An individual may feel losing, maintaining, or increasing face based on recognizing others' evaluation of his/her behavior in a certain situation. Thus, it can also be called "social contingent self-esteem" (Hwang, 2012, p.270).

4.2 China's Digital Technology

As the world grapples with the rapid advancements in digital technology, the trajectory of China's evolution within this dynamic landscape deserves careful examination. From its humble beginnings to its present-day dominance, China's digital ecosystem has transformed remarkably, shaping global trends and challenging long-held assumptions (Hussain et al., 2023). Delving into China's digital technology past, present, and future offers a unique lens to understand the country's societal, economic, and geopolitical landscape (Chen et al., 2022).

Rewind to the early 1990s, when China's digital revolution was still nascent (Jin et al., 2022). Marked by limited internet access and a nascent technological infrastructure, the country's digital landscape was a far cry from today's vibrant, interconnected ecosystem. However, the seeds of innovation were already sown, as the government recognised the strategic importance of embracing digital technologies to drive economic growth and modernisation. Spearheaded by visionary leaders and bolstered by a burgeoning tech-savvy population, China's digital transformation gained momentum, laying the groundwork for the remarkable achievements that would follow (Zhang et al., 2021; Wang et al., 2022; Li et al., 2021).

The turn of the 21st century ushered in a new era of digital dominance for China. The advent of the internet and the proliferation of mobile devices catalysed a profound shift in the country's technological landscape. Fuelled by a vast domestic market, Chinese tech giants like Alibaba, Tencent, and Baidu emerged as global powerhouses, redefining the parameters of e-commerce, social media, and search engine technologies. These companies not only dominated the domestic market but also expanded their reach globally, challenging the hegemony of Western tech giants and establishing China as a formidable player on the international stage (Hussain et al., 2023; Jiang & Murmann, 2022).

Alongside the rise of these tech behemoths, China's digital ecosystem has witnessed the rapid development of cutting-edge technologies, from artificial intelligence and robotics to blockchain and quantum computing (Liu et al., 2023). Driven by strategic government initiatives, such as the "Made in China 2025" plan and the "Digital Silk Road" project, China has invested heavily in research and development, fostering an environment conducive to innovation and technological breakthroughs (Hussain et al., 2023). The country's embrace of emerging technologies has not only transformed domestic industries but also positioned it as a global leader in shaping the future of digital innovation (Wang et al., 2022).

As China looks towards the future, its digital landscape is poised to undergo even more profound transformations. The continued expansion of 5G networks, the widespread adoption of the Internet of Things,

and the increasing integration of artificial intelligence into various sectors are just a few of the developments that will define China's digital landscape in the coming years (Li et al., 2021). Moreover, the country's commitment to developing a robust, secure, and self-reliant digital infrastructure, exemplified by initiatives such as the "Cyber Superpower" strategy, suggests a future where China's digital dominance is further consolidated, with far-reaching implications for the global digital order (Hussain et al., 2023; Zhang et al., 2021).

4.3 The Digital and the Sustainable

That which is digital (Martins et al., 2024) is good for the environment. Less paper, less travel, less use of scarce resources. "Recent research has empirically verified the beneficial impact of digital technology applications on environmental performance" (Ji et al., 2024, p.1). However, according to a study on China, "SMEs are not as suited to the broad adoption of digital technologies as large firms; instead, they should focus on the deep application of specific digital technologies to promote environmental innovation." (Ji et al., 2024, p.1).

Such digital technologies are already being used in tourism, in China, to avoid the negative effects of over-tourism. Digital management software systems which monitor the affluence to certain locations where previous booking is also prioritized (a good management concept).

Analyzing Chinese firms between 2011 and 2020, Wang et al. (2025, p.1) "investigate how geographic factors influence enterprise digital transformation (EDT) [...] Our heterogeneity analysis shows that compared to non-provincial dual-core cities, proximity to major cities has stronger influence on enterprise digital transformation in provincial capitals and first-tier cities." The modern part of cities such as Chengdu have certainly shown a miraculous evolution in the last 40 years and show how - with the proper planning - the digital transformation may be capitalized on.

The digital transformation is also supporting a better connection between the population and local authorities. Hence people are becoming more sustainable and less and less litter may be seen in the streets and modern China is now one of the cleanest modern countries one may visit. China's electric vehicles are also contributing to a smaller carbon footprint and to the aim of meeting sustainability targets set for China.

5. Methodology

This research employs a mixed-methods approach, combining bibliometric analysis, literature review, and autoethnographic narratives (autoethnography = autobiography + ethnography (Ellis et al., 2011)). "Autoethnography is an approach to research and writing that seeks to describe and systematically analyze personal experience in order to understand cultural experience." (Ellis et al., 2011, p.1).

The bibliometric analysis, conducted using VOSviewer, identifies key research trends in tourism and technology. Autoethnographic narratives provide a qualitative dimension, offering firsthand reflections on the experiences of researchers and participants during the TourX project visit.

The study adheres to qualitative research principles, with thematic analysis applied to the autoethnographic narratives. These narratives are analyzed iteratively to extract key themes related to technology, cultural adaptation, service quality, and sustainability. Furthermore, empirical insights are triangulated with existing literature to enhance the validity of the findings.

6. Autoethnographic Accounts

Four autoethnographic accounts follow below.

6.1 Autoethnography 1 - Feelings and the General Experience of Being in China – Manuel Au-Yong-Oliveira

I had been to China before, in late 2019 (November-December), on another business trip, with my colleagues (directors of organic units, or faculties) from the University of Aveiro (in central Portugal). My previous trip had lasted around ten days, just like this most recent trip I was experiencing. I had expected to see a lot of confusion during my first trip and was surprised when I did not. I then realized that everyone was working during our time in China, it not coinciding with any holidays that they have. Certainly, the factories we saw on the horizon, one after the other, had smoke coming out of their chimneys, showing a lot of activity. I suppose to make super-power status, as the Chinese certainly have, one has to work hard, up and above what the rest of the world is perhaps working. Even my trip to the Great Wall was one where we were left alone to ourselves.

My second and current trip had again shown how docile a people the Chinese are. We foreigners were pretty much left alone to do what we wanted to, though I coming from a Chinese ethnic background myself had been

approached amicably by an older Chinese lady who spoke to me in Chinese and was probably expecting a response... I do not speak Chinese and can only understand a few words. I obviously look Chinese...

The quality of the Chinese-made electric cars struck us as being extraordinary (up and above anything we were seeing coming out of Europe; certainly, at a par). Upon talking to a local Chinese official, he said that the strategic option had been to move away from what other countries were doing well – combustion cars – and moving towards innovation and sustainability with electric cars. Hence the low carbon-emission objective of 2030 could be reached, as was obviously a concern for the Chinese government.

We saw no repression. We saw instead a people content with going about their own business and with living their own lives amicably and without any fuss or confusion.

Civil servants, having worked for the State, could expect a good pension. This was as I perceived it should be, being a civil servant myself, in Portugal. With less holidays than in the West, the Chinese apparently want to enjoy their retirement as soon as possible and the retirement age is lower in China than in the West, more so for women, according to one of our tour guides for our latest visit. Women retire at around 60 years of age and men five years later at around 65 years of age, in China.

Being in the West, and living in Portugal, I have come across many perhaps biased accounts of unhappy Chinese people, and stories of a repressive regime. I saw none of that while in China. Nor during my first visit, nor during my most recent visit. Yes, I saw a lot of order and respect, but these are good things to see in a society, especially one with so many people. We also saw no litter, and everything was very nice and clean. Remarkable, when compared to some large Western cities.

Most of the tourists we saw were locals, Chinese, and a Chinese official said to expect more than 90% to be Chinese (Figure 3).

A unique event that I experienced and that define the Chinese culture and approach was related to me having lost my weekly agenda (4 pages long, printed in colour) for the week-long visit in Chengdu. “May I have another one please?” I requested of an official. The Chinese official was very clear and gave me a sustainable answer: Everyone was given a copy... no extra copies. Lesson learned - take better care of your things especially if given as a work gift by the host organization.



Figure 3: The Imperial College – Beijing – More than 90% of the tourists in China are Chinese (domestic)

Fast-train trips in China are a reality. Easy on- and off- boarding, with the train doors at the same level as the platform – no climbing up and down high steps with heavy luggage – all is facilitated. But most of all what was impressive was that one of the trains actually left a little early – as everyone was seated already, no rushing on the platform, no stressful, last-minute boarding by travellers. All was calm and collected and so the whole trip was comfortable and well within the timetable as disseminated. Impeccable organization.

There is plenty to see in China – for example, the Terra-cotta Warriors and Horses of Qin Shihuang (Figure 4). A breathtaking view of history and of the vision of one particular prince who became known as the first emperor of China. This location, in Xi'an, is known as the eighth wonder of the world.



Figure 4: Museum of the Terra-cotta Warriors and Horses of Qin Shihuang - built 2,200 years ago by 720,000 people and over a period of 38 years

6.2 Autoethnography 2 - from Roger Heinzl (Germany)

In the West, we hear a lot about it and have a general sense of how we compete with China. Popular media publications have emphasised that ‘the US innovates, Europe regulates and China imitates’. The common opinion at home is that China lacks creativity, independent and strategic thinking. We see here that this is not the case. The main tenor of the discussion at home does not reflect the intelligence, the creative atmosphere and the perfect organisation that we find here. The exchange of ideas, the openness and the friendliness are so interesting for us, including for the Germans here, that we ask ourselves: ‘How can we develop such a service orientation?’

For example, modern Chengdu has been created over the last 40 years, a city with 22 million inhabitants today. A lot of thought has certainly been given to what this high-tech city should look like, and a lot of urban planning has been done. What is special, however, is the speed of implementation, the obvious parallelism of planning and implementation.

My perspective has changed, and I have realised that to understand another country, you have to travel there and experience the culture and environment first hand.

You have to focus on understanding and not just travelling as a tourist, but being open-minded when travelling (and researching as a participating observer). This opens up new horizons and results when done this way.

6.3 Autoethnography 3 - "VET Impressions from China" - Antonio Gennarelli (Italian, Based in Belgium)

In terms of international collaboration and exchanges in the field of Vocational Education and Training (VET), Europe finds itself in between two emerging continental realities. From one side, the heterogeneous African context, ruled by the principle of informality in the provision of training as well as partnership dealing and collaboration. From the other side, the close-to granitic Chinese system - whose study and observation has been the objective of the Study Visits organized in the context of the European Union-funded project 'TourX - Centres of Vocational Excellence in Tourism'.

Upon interacting with more than 30 educational institutions from the southwestern province of Sichuan, centred in the almost-futuristic city of Chengdu (whose name means 'established capital') as core hub of the region across strategic borders for China, and visiting 5 colleges over the course of 5 days thanks to the invitations of local educational leaders, we are then able to collect some interesting insights on the Chinese approach to VET.

Referring back to the previously mentioned concept of formality, it is indeed impressive to note the maze of structural partnerships underpinning the provision of VET in China. Accredited colleges are by the largest extent public (approximately on a ratio of 5 to 1 according to the Sichuan Education Association for International Exchange) and jointly run by both political & educational leaders. In Europe, where CoVEs strive to engage public authorities for network governance, the Chinese way may appear as an interesting paradox. Colleges regularly cover education up until higher VET, which may be loosely referred to as Level 5 of the European Qualifications Framework; an important achievement, aspiring to provide an ever-higher education technical workforce. It is under this lens that we can understand the strive towards the achievement of 'university' status for many of the institutions we have encountered. Not to create threshold with their technical provision but rather providing clear, qualitative pathways to higher education for a workforce always more engaged in challenging the current state of the art in technological innovations vis-à-vis the rest of the world. In this sense, it remains even more impressive the slogan written in cubital letters outside one of the Chengdu Industry and Trade College campuses – '*Machinery changes the world*' (please see Figure 5).

International business courses over the course of the last 20 years may have juxtaposed the American way of doing business to the Asian one (or ones, if we consider the larger East Asian context): from one side, a transparent, contract-based approach to collaboration on this side of the Atlantic; moving towards the East, collaboration protocols remain more blurred, established on long-term relationships of trust and commonly agreed values. The situation may appear more complex than what it looks like. It may be true that the myriads of Memoranda of Collaboration do not carry legal value per se; however, it is also considerably reductive to consider them as a truly informal approach to collaborations. As now such Memoranda, especially in CoVE establishment, prove the strength of one's network, in China they enshrine the preferred - if not only one - way to collaboration, be it nationally or internationally. Whoever has attended conferences in countries such as China, but also Malaysia, would have surely noticed the true protagonist of such occasions: the protocol!

Specifically for VET, exploring the formality of such education becomes an interesting exercise to better understand the tendency of the system. And if then transforming from a college to university appears to be a matter of indicators (campuses' square meters, number of students enrolled or majors offered) according to the vice principal of one of the institutions visited, then the approach may not be so distant to certain traditions also in Europe (specifically German but also others) in terms of development across the board.

Although not specifically contemplated in the scope of this visit, the training of adults remains a fascinating topic for a population whose reaching more and more higher levels of wealth and prosperity. Negotiations of labour demands are overall centralised and the whole-of-company cultures pushes the workforce to give nothing but the most to the organisation - a remembrance of corporatists approach almost. While in Europe syndicates and trade unions have advocated and do provide training in the form of reskilling or upskilling, there is still space to explore how this is carried out in China, especially beyond the example of large companies which may offer, to some extent, in-service training or internal career pathways.

Since 2017, China has been deeply invested in the improvement of their vocational training system. Understanding the crucial importance of technical occupations, which have made the fortune of the proud Asian giant, allowing it to catch up in terms of technological advancements to the rest of the world. In this perspective, how do China and the rest of the world, or more appropriately for our discussion - Europe, look at each other? For Europeans, China represents still an untapped market at least in the educational sector. Experiments in earlier years, from the year 2000 onwards and until the real true halt of COVID, have only resulted in partial achievements if at all. It is possible that the openness of the country in the post-pandemic era, enshrined by the

visa-free policy of up to 15 days for many European countries and the overall great interest of institutions in international collaborations beyond the perhaps more strategic and regular arena of South East Asia, may provide a renovated opportunity for education-oriented collaboration also at the vocational level. Furthermore, the solidity of this approach may now enjoy a crucial enabling factor represented by the general consensus of Chinese policymakers in terms of strengthening vocational training not only in terms of quantity (the aforementioned KPIs) but also in terms of quality. It is in this context that even before its launch, three Chinese colleges have signed international collaboration agreements at the time of writing for the benchmark of their curricula against the European Qualifications Framework. In an ever more competitive environment for technological advancements and staff shortages across Europe, it will be crucial to understand the strategic stance of the European Union with its continental counterpart in Asia. It remains without doubts though that an impressive interest and commitment to better understand each other can truly represent the foundation of a long-term international partnership for VET at the highest of levels.



Figure 5: The slogan written in cubital letters outside one of the Chengdu Industry and Trade College campuses – ‘Machinery changes the world’

6.4 Autoethnography 4 - An Objective Look at Chinese Culture – Contribution from Emanuela Vizzarro (Italy)

Autoethnography, a research method that blends autobiography and ethnography, allows for a deeply personal exploration of cultural experiences. By examining my own experiences during 8 years of living in China as a western individual, I aim to shed light on the complexities and nuances of Chinese culture, challenging stereotypes and promoting cross-cultural understanding.

Through this autoethnographic lens, I would like to delve into the significance of family and collectivism in Chinese society, exploring how these values shape individual identities and social interactions, but for doing so

I would need one entire chapter. I would also examine the concept of "face" and its impact on communication and interpersonal relationships, because during our one-week study visit in Chengdu we attended many meetings with Chinese local authorities, colleges, schools and universities.

Additionally, I would discuss the role of tradition and modernity in contemporary China, highlighting the tension between preserving cultural heritage (historical places in the city, Museums, Opera) and embracing technology globalization and control (biometric measurements, digital payments, phone applications).

By sharing my personal stories and reflections, I hope to foster empathy and critical thinking about Chinese culture. This autoethnographic approach allows for a more nuanced understanding of the complexities of cultural identity and challenges the notion of a monolithic Chinese culture. It encourages readers to question their own assumptions and biases, promoting intercultural dialogue and respect.

China is a country you cannot imagine, you have to come and visit its cities and experience its culture even if only for a few days, in order to change your perspective. I lived there for eight years and despite the long period, I cannot claim to have fully understood it.

7. Analysis and Discussion of the Autoethnographic Narratives

The coauthors of the autoethnographic narratives shared insights into what they saw and also commented on each others' perspectives. One coauthor knew China particularly well and loved it, having lived there for eight years in the past. The perspective was unanimous, in fact. China was a nice place, despite what may be said in the media, and it was even better to visit. Tourists were treated with great respect and otherwise left alone to 'do their own thing' and enjoy themselves. Let it be noted that, currently, the vast majority of tourists in China are China-nationals.

Table 1 shows key contributions from the autoethnographic narratives following a thematic analysis of the content of each narrative. Themes such as technology, service orientation, formality, consensus, and organization can be seen in table 1 – describing what we saw in China.

Table 1: Key contributions from the autoethnographic narratives (thematic analysis)

Coauthor	Contributions / quotes	Theme(s)
Manuel Au-Yong-Oliveira	"Fast-train trips in China are a reality." "How docile a people the Chinese are". "Everyone was given a copy... no extra copies." "No stressful, last-minute boarding by travellers".	Technology; docile culture; sustainability; organization.
Roger Heinzl	"The discussion at home does not reflect the intelligence, the creative atmosphere and the perfect organisation that we find here" "The exchange of ideas, the openness and the friendliness are so interesting for us". "My perspective has changed".	Surprise and acknowledgement; service orientation; change in mentality.
Antonio Gennarelli	"It is indeed impressive to note the maze of structural partnerships underpinning the provision of VET in China". 'Machinery changes the world'. "The general consensus of Chinese policymakers in terms of strengthening vocational training not only in terms of quantity (the aforementioned KPIs) but also in terms of quality".	Formality; technology; consensus.
Emanuela Vizzarro	"The significance of family and collectivism in Chinese society". "The concept of "face" and its impact on communication and interpersonal relationships". "China is a country you cannot imagine, you have to come and visit".	Family values; interpersonal relationships and 'face'; surprise and acknowledgement.

8. Findings and Discussion

8.1 Tourist Perceptions of China

The data reveals a stark contrast between media portrayals and actual tourist experiences. Contrary to common assumptions, respondents noted a high degree of safety, efficient public transportation, and well-organized tourist facilities. Fast-train networks, for instance, were described as punctual and technologically advanced.

Moreover, interactions with local communities indicated a strong emphasis on hospitality and service quality. While language barriers were occasionally encountered, technological solutions, such as translation apps, effectively facilitated communication. Respondents were particularly impressed by the integration of digital technology in everyday life, including cashless transactions and AI-driven customer service.

8.2 Cultural Insights and Social Dynamics

Observations indicated a cultural ethos centered on collectivism, respect, and efficiency. Chinese society places significant value on social harmony, which was evident in public interactions and institutional practices. Tourists expressed surprise at the widespread use of digital platforms for governance and civic engagement. Notably, urban cleanliness and environmental consciousness were frequently cited as positive attributes.

8.3 Technology and Digital Infrastructure in Tourism

China's emphasis on technological innovation was evident in its smart tourism infrastructure. Digital reservation systems optimized visitor flow at major tourist attractions, reducing congestion and enhancing the overall experience. The country's digital transformation has streamlined tourism logistics, allowing for seamless transitions between different modes of transport.

8.4 Final Remarks

According to research by The Culture Factor Group (2025) (based on research by the late Geert Hofstede and colleagues), China's low uncertainty avoidance score (of 30) may explain why rapid change has occurred in society there. This, coupled to an above-average motivation score (of 66), a high long-term orientation score (of 77) and a low indulgence score (of 24) support our findings regarding tourist perceptions of China. Finally, according to the same source, China is indeed more collectivist with a below-average score for individualism (of 43).

9. Conclusion

China is an example of what can be achieved in a very short period of time by a focused leadership with a vision for the country and its population. We have sought herein to spur the discussion on China having visited the country in November 2024 for the TourX Erasmus+ funded project.

This study highlights the discrepancy between Western media narratives and the lived experiences of tourists in China. Findings suggest that China's tourism sector is characterized by advanced technological integration, strong safety measures, and a high standard of service quality. The research underscores the importance of firsthand engagement in forming accurate perceptions of global destinations.

Future research should explore the long-term impact of China's digital tourism ecosystem and its implications for global tourism development. The findings presented herein contribute to a nuanced understanding of China's tourism industry and its role in fostering cross-cultural exchange.

Acknowledgements

ChatGPT 4.0 was used for text optimization only and to make the flow of the text better and more formal. This study was financed by the European Union / Erasmus+ Programme - TourX international project funds [official project name: CoVEs for the Tourism Industry].

References

- Amaro, V. (2024). Crowding in two voices: The cultural transformation of the Portuguese rooster in postcolonial Macau. *Humanities and Social Sciences Communications*, 11, 250. <https://doi.org/10.1057/s41599-024-02748-5>
- Au-Yong-Oliveira, M. (2020). Using Reflexive, Introspective and Storytelling Tools: Towards Becoming More Autoethnographic in Academia. *Education Sciences*, 10(4), 120, 1-15.

- Au-Yong-Oliveira, M., Barreiros, J., Gonçalves, R., Costa, C. (2018). An analysis of destinations, events and national cultures and the possibly negative effects and costs for tourism. *Proceedings of the International Conference on Tourism Research (ICTR 2018)*, pp.1-9. JAMK University of Applied Science, Jyväskylä, Finland, 22-23 March.
- Au-Yong-Oliveira, M., Branco, F., Costa, C. (2019). A evolução cultural graças à adoção da tecnologia e ao fenómeno “Mix-Tech” – Um estudo exploratório baseado na observação [The cultural evolution thanks to the adoption of technology and the ‘Mix-Tech’ phenomenon - An exploratory study based on observation]. *RISTI – Revista Ibérica de Sistemas e Tecnologias de Informação*, Nº E17, 01/2019, 854-869.
- Chen, Y., Xu, S., Lyulyov, O., & Pimonenko, T. (2022). China’s digital economy development: incentives and challenges. *Technological and Economic Development of Economy*, 29(2), 518–538, <https://doi.org/10.3846/tede.2022.18018>
- Duong, L.H., Kong, Y.-Q., Olya, H., Lee, C.-K., Girish, V.G. (2025). Echoes of tragedy: How negative social media shapes tourist emotions and avoidance intensions? A multi-methods approach. *Tourism Management*, 108, June, 105122.
- Ellis, C., Adams, T.E., Bochner, A.P. (2011). Autoethnography: An overview. *Forum: Qualitative Social Research*, 12(1), article 10, January.
- Hussain, F., Hussain, Z., Khan, M. I., & Ali, I. (2023). The digital rise and its economic implications for China through the Digital Silk Road under the Belt and Road Initiative. *Asian Journal of Comparative Politics*, 9(2). <https://doi.org/10.1177/20578911231174731>
- Hwang, K.-K. (2012). Foundations of Chinese Psychology: Confucian Social Relations. *International and Cultural Psychology*, 1, DOI 10.1007/978-1-4614-1439-1_10
- Ji, H., Lin, L., Wan, J., Zang, J. (2024). Can digital technology adoption promote environmental innovation in small and medium-sized enterprises (SMEs)? Evidence from China. *Science of the total Environment*, 955, 10 December, 176887. <https://doi.org/10.1016/j.scitotenv.2024.176887>
- Jiang, H., Murmann, J.P. (2022). The Rise of China’s Digital Economy: An Overview. *Management and Organization Review*, 18(4), 790–802. <https://doi.org/10.1017/mor.2022.32>
- Jin, C., Xu, A., Zhu, Y., & Li, J. (2022). Technology growth in the digital age: Evidence from China. *Technological Forecasting and Social Change*, 187, 122221, <https://doi.org/10.1016/j.techfore.2022.122221>
- Li, J., Chen, L., Ying, C., & He, J. (2021). Digital economy, technological innovation, and green economic efficiency - Empirical evidence from 277 cities in China. *Managerial and Decision Economics*, 43(3), 616-629, <https://doi.org/10.1002/mde.3406>
- Liu, M., Li, C., Wang, S., & Li, Q. (2023). Digital transformation, risk-taking, and innovation: Evidence from data on listed enterprises in China. *Journal of Innovation & Knowledge*, 8(1), <https://doi.org/10.1016/j.jik.2023.100332>
- Martins, J., Gonçalves, R., Branco, F. (2024). A bibliometric analysis and visualization of e-learning adoption using VOSviewer. *Univ Access Inf Soc*, 23, 1177–1191. <https://doi.org/10.1007/s10209-022-00953-0>
- Qiliang, M., Shanming, G. (2024). Government dishonesty, trust and cooperative behaviour: Evidence from China’s Great Leap Forward. *Annals of Public and Cooperative Economics*, 95, 1061–1094. <https://doi.org/10.1111/apce.12482>
- The culture factor group (2025). Country comparison tool – China. Available at: <https://www.theculturefactor.com/country-comparison-tool?countries=china>, accessed on 13-02-2025.
- Wang, K., Yu, Y., Zheng, H. (2024). Walk your reputation: The impact of corporate social responsibility decoupling on the hospitality and tourism firm value in the time of crisis. *Tourism Economics*, 30(6).
- Wang, T., Zhao, X., Li, X. (2025). Geographical influences, media attention and enterprise digital transformation. *Technological Forecasting and Social Change*, 210, 123853, <https://doi.org/10.1016/j.techfore.2024.123853>
- Wang, X., Li, Y., Tian, L., & Hou, Y. (2022). Government digital initiatives and firm digital innovation: Evidence from China. *Technovation*, 119, 102545, <https://doi.org/10.1016/j.technovation.2022.102545>
- Wu, T. (2024). The visual construction of the people’s country and the Chinese nation: political aesthetics in the Ethno-documentaries of New China. *Int. j. anthropol. ethnol.*, 8, 18. <https://doi.org/10.1186/s41257-024-00118-2>
- Yang, L., Walker, R., Xie, J. (2020). Shame, Face and Social Relations in Northern China: Ramifications for Social Assistance Provision. *The China Quarterly*, 243: 655-675. doi:10.1017/S0305741019001255
- Zhang, W., Zhao, S., Wan, X., & Yao, Y. (2021). Study on the effect of digital economy on high-quality economic development in China. *PLoS ONE*, 16(9). Public Library of Science. <https://doi.org/10.1371/journal.pone.0257365>
- Zhu, Y., Chai, S., Chen, J. et al. (2024). How was rural tourism developed in China? Examining the impact of China’s evolving rural tourism policies. *Environ Dev Sustain*, 26, 28945–28969. <https://doi.org/10.1007/s10668-023-03850-5>

Longitudinal Dynamics of MSME Growth in Iloilo, Philippines: Assessing the Economic and Social Ripple Effects of Domestic Tourism

Ma. Gerlia Aujero Blanza

West Visayas State University - Lambunao Campus, Iloilo, Philippines

mgbblanza@wvsu.edu.ph

Abstract: This longitudinal study delves into the impact of domestic tourism on Micro, Small, and Medium Enterprises (MSMEs) in Iloilo, Philippines, highlighting the economic advantages and the concurrent challenges. Interviews with MSME representatives revealed a significant boost in revenue during peak tourist seasons, leading to business growth and enhanced local employment. This economic benefit is further underscored by improvements in community infrastructure, funded largely by tourism-generated revenue. However, the study also uncovers several challenges. Chief among these is the inconsistency of seasonal income, compelling MSMEs to continually adapt to changing tourist preferences. This dynamic presents a complex balancing act for businesses striving to capitalize on tourism benefits while managing the unpredictability of the market. Focus Group Discussions (FGDs) reinforce the positive economic impact on MSMEs, but also bring to light critical concerns about environmental degradation and potential cultural erosion. These discussions suggest a delicate interplay between economic growth and the preservation of environmental and cultural integrity. Collaborative efforts among MSMEs are highlighted as a vital strategy to maximize tourism opportunities. The study recommends policy support, capacity building, and strengthened inter-business collaboration to address the identified challenges and enhance the benefits of tourism. Such collaboration is deemed essential for promoting sustainable tourism practices. Observations during the study indicate that businesses in tourist-heavy areas generally thrive, benefiting from their strategic locations and physical attributes. Nonetheless, there are evident signs of environmental stress in these areas, underscoring the need for urgent implementation of sustainable tourism practices. The study concludes that while domestic tourism is a catalyst for economic growth in Iloilo, it also presents sustainability challenges. These dual aspects of tourism's impact necessitate further research into sustainable tourism practices that can strike a balance between economic development and environmental and cultural preservation. The findings advocate for a nuanced approach to tourism development, ensuring it contributes sustainably to the economic and social development of the community, while safeguarding its environmental and cultural heritage.

Keywords: Domestic tourism, MSMEs, Economic impact, Sustainability, Post-covid-19 recovery, Philippine tourism

1. Introduction

Micro, Small, and Medium Enterprises (MSMEs) are a crucial component of the Philippine economy, accounting for 99.52% of total establishments and contributing significantly to employment and economic growth in the country (Philippine Statistics Authority, 2018). The significance of MSMEs in propelling equitable development is recognized globally, and this is especially true in developing economies such as the Philippines (Ayyagari, Demircuc-Kunt, & Maksimovic, 2011). As one of the world's largest and fastest-growing economic sectors, tourism has substantial socio-economic impacts, including contributions to the country's GDP and employment (UNWTO, 2019). Domestic tourism, which involves residents of the country traveling only within this country (Page & Connell, 2014), forms a key component of the tourism industry in the Philippines and has an important role in regional development. Iloilo, a province in the Western Visayas region, is known for its rich cultural heritage and natural beauty, making it an attractive destination for domestic tourists. The province's strategic geographical location and accessibility make it a potential growth area for the tourism industry, which can significantly benefit the local MSMEs, particularly in the hospitality and retail sectors (Philippine Department of Tourism, 2020). The aim of this study is to explore the socio-economic impacts of domestic tourism on MSMEs in Iloilo, providing valuable insights that could inform strategies to optimize the benefits of tourism for local economic development.

1.1 Objectives

The study aims to explore and understand the socio-economic impact of domestic tourism on MSMEs in Iloilo, Philippines.

- To analyze the role of domestic tourism in the economic development of MSMEs in Iloilo, including its effect on revenue generation, profitability, and job creation.
- To gain insights on the social impact of domestic tourism on MSMEs and the local community, including changes in lifestyle, culture, and social structures.
- To identify the opportunities and challenges experienced by MSMEs in Iloilo due to domestic tourism.

- To investigate the strategies employed by MSMEs to leverage the benefits of domestic tourism and to overcome associated challenges.
- To examine the effects of fluctuations in domestic tourist arrivals on the operations and sustainability of MSMEs in Iloilo.
- To provide recommendations for MSMEs, policymakers, and other stakeholders on harnessing domestic tourism for local socio-economic development.

1.2 Significance

This study's findings can guide policies to maximize tourism benefits for MSMEs while minimizing drawbacks. It provides practical insights for MSMEs to leverage opportunities, address challenges, and ensure sustainability. It also fills a research gap by offering a deeper understanding of domestic tourism's socio-economic impacts on MSMEs in a developing country, enriching tourism discourse.

2. Literature Review

2.1 The Significance of MSMEs

Micro, Small, and Medium Enterprises (MSMEs) are fundamental pillars of the economy, particularly in developing countries. They are often referred to as the backbone of the economy due to their significant contributions to employment and Gross Domestic Product (GDP) (OECD, 2020). In the Philippines, MSMEs account for 99.52% of total establishments and contribute significantly to employment (Philippine Statistics Authority, 2018). They offer livelihood opportunities, help in poverty reduction, and enable equitable distribution of wealth (Goedhuys & Sleuwaegen, 2010). Studies have shown that MSMEs also foster innovation and competitiveness, often serving as incubators for new business models, products, and services (Ayyagari, Demircuc-Kunt, & Maksimovic, 2011). Despite challenges such as access to finance and market reach, they show resilience and adaptability in times of economic upheavals (Aterido, Hallward-Driemeier, & Pagés, 2011).

2.2 The Role and Potential of MSMEs in Realizing Socio-Economic Development in Emerging Economies Like the Philippines

MSMEs are economic powerhouses, especially in developing nations like the Philippines (Ayyagari et al., 2011). They fuel local economies, drive entrepreneurship, and create jobs, even in remote areas (OECD, 2020). Beyond economics, they democratize business, offering accessible income across socio-economic groups (Fatoki, 2018). Remarkably resilient, they adapt to challenges like limited resources and regulations (Aterido et al., 2011). In the Philippines, where MSMEs dominate the business landscape, understanding and supporting them is key to achieving wider socio-economic goals (PSA, 2018). Smart policies and targeted support can unlock their full potential and fuel broader prosperity (OECD, 2020).

2.3 The Relationship Between MSMEs and Socio-Economic Development

MSMEs are vital forces for socio-economic progress worldwide (Ayyagari et al., 2011; Fatoki, 2018). They fuel job creation and income distribution, combating poverty and fostering social stability (Hallward-Driemeier et al., 2011). Despite facing challenges, their adaptability and resilience contribute to economic sustainability (Hallward-Driemeier et al., 2011). In the Philippines, MSMEs even help prevent urban migration by offering regional job opportunities, promoting balanced development (Felipe et al., 2020). Clearly, these small engines drive big progress.

2.4 The Role of Domestic Tourism

Domestic tourism fuels economies globally, providing stability and growth particularly in developing nations like the Philippines (Mason & Leimkuehler, 2019; Sigala, 2020). In the Philippines, it directly contributes over 10% of GDP (PSA, 2020) and promotes regional development while preserving culture and boosting well-being (Bieger et al., 2017). It's a powerful engine for socio-economic progress

2.5 Socio-Economic Impacts of Domestic Tourism: A Review of Literature

Research paints domestic tourism as a socio-economic powerhouse. It fuels job creation and income distribution, particularly in overlooked regions and service sectors (Mason & Leimkuehler, 2019). This sparks regional growth, often through infrastructure improvements and local business support. Beyond economics, domestic tourism safeguards cultural heritage as local tourists, with their deeper understanding, actively promote traditions (Timothy, 2011). During global crises, its stability shines, providing a reliable revenue stream

for tourism-dependent economies (Sigala, 2020). Domestic tourism, it seems, offers a multi-pronged approach to positive socio-economic change.

2.6 Intersection of MSMEs and Domestic Tourism

The interaction between tourism, both domestic and international, and Micro, Small, and Medium Research consistently highlights tourism's vital role in boosting MSMEs and fostering socio-economic growth. It fuels their growth by increasing demand for their products and services (Petroman et al., 2012), leading to a flourishing of both MSMEs and tourism experiences. MSMEs in tourism also act as crucial job creators, particularly in rural areas (Baum & Szivas, 2008), boosting local incomes and combating poverty. They contribute to local economic development by driving infrastructure improvements and community services (Nieminen, 2010). Domestic tourism, in particular, strengthens MSMEs that preserve and promote cultural heritage, safeguarding traditions and local cuisine (Timothy, 2011). Notably, Sigala (2020) found that domestic tourism acts as a lifeline for MSMEs during economic downturns and crises, providing consistent revenue even during international market fluctuations.

2.7 Benefits and Challenges for MSMEs in the Tourism Sector

Tourism MSMEs offer substantial benefits like local economic growth, job creation, and cultural preservation (Petroman et al., 2012; Baum & Szivas, 2008; Timothy, 2011). However, they face challenges like seasonality, limited capital access, regulatory hurdles, and stiff competition (Butler, 2001; Beck et al., 2005; Thomas, 2000; Page, 2007). Recognizing both sides is crucial for policymakers and stakeholders to effectively support and develop these businesses.

2.8 Case Studies and Regional Specificities

Boracay, a famous Philippine Island renowned for its white-sand beaches and dynamic nightlife, is an exemplar of the impact of domestic tourism on MSMEs. Canares, Llanes, and Alenton (2016) illustrated that Boracay's MSMEs, encompassing local restaurants, souvenir shops, and petite tour operators, have significantly contributed to the island's tourism economy. However, these MSMEs also grappled with concerns related to environmental sustainability, business formalization, and competition with larger businesses.

Cuevas (2012) presented a case study on Palawan, coined as the Philippines' "Last Ecological Frontier," highlighting the contribution of MSMEs in the province's ecotourism sector. Rural communities' MSMEs leveraged Palawan's unique ecological and cultural assets to provide distinctive tourism experiences. Despite encountering several challenges like seasonality and access to capital, these enterprises have considerably contributed to local economic growth and sustainable development.

In a similar context, Sukartiko's study (2017) on Bali, Indonesia, a locale famed for its arts and crafts, elucidates the impact of domestic tourism on handicraft MSMEs. The rise in domestic tourism significantly escalated the sales of local handicrafts, resulting in augmented incomes for artisans and positive secondary impacts on the local economy. However, issues related to product standardization, skills development, and market access were also underscored.

2.9 Gaps in the Literature

Current research on the relationship between tourism and MSMEs in Iloilo exhibits several notable gaps. Most studies lack in-depth focus on Iloilo's specific context, calling for research that explores the region's unique tourism dynamics, challenges, and opportunities. Longitudinal studies tracking the long-term impacts of tourism on Iloilo MSMEs are also scarce, leaving potential long-term effects and trends underexplored. Additionally, the existing literature leans heavily towards quantitative methodologies, often overlooking qualitative insights that capture the lived experiences and narratives of MSME proprietors in Iloilo. Finally, policy implications derived from these findings are often inadequately discussed, highlighting a need for future research to identify and propose strategies that can foster the growth and sustainability of MSMEs within Iloilo's tourism framework.

3. Methodology

3.1 Research Approach

The qualitative research approach adopted in this study was pivotal in capturing the intricate dynamics of MSMEs within Iloilo's tourism sector. This approach was chosen for its ability to delve deeply into the subjective experiences and perspectives of the participants, providing depth and understanding that quantitative methods might overlook. It offered the flexibility to adapt to emerging themes and insights, a crucial aspect when

exploring complex social phenomena. By focusing on qualitative methods such as in-depth interviews and document analysis, the study was able to gather rich narratives and contextual information. This approach allowed for a nuanced exploration of the socio-cultural and economic contexts influencing MSME operations and strategies, highlighting the narrative richness and human-centered perspectives crucial to understanding the impact of domestic tourism.

3.2 Study Design

The longitudinal design of this research played a critical role in comprehensively understanding the impact of domestic tourism on MSMEs over time. By repeatedly observing and interviewing the same set of participants, the study could track changes and developments in their business operations and strategies. This longitudinal perspective was instrumental in discerning causal relationships and long-term effects, which are often not apparent in cross-sectional studies. It enabled the researchers to observe how MSMEs adapted and responded to the evolving challenges and opportunities presented by the tourism sector, providing a rich, time-extended understanding of the socio-economic changes within Iloilo. This design choice was key to capturing the dynamic and evolving nature of the tourism industry and its sustained impact on local businesses.

3.3 Population and Sampling

The study focused on a selected group of MSME owners, employees, and stakeholders within Iloilo's domestic tourism sector. The sampling strategy was purposive, targeting individuals who had direct and relevant experiences with the impact of tourism on local businesses. The aim was to gather diverse perspectives, encompassing a range of roles within the tourism ecosystem. This approach ensured a comprehensive understanding of the socio-economic dynamics at play, providing a representative cross-section of the MSME community affected by domestic tourism.

Table 1: Participant's Profile

Participant Type	Ideal Number of Participants	Profile
Interviews (MSMEs)	15	Owners/managers of Micro, Small, and Medium Enterprises (MSMEs)
Focus Group Discussions (FGD)	12	Local residents and tourists

Table 1 shows the profile the interviewee and FGD participants.

3.4 Data Collection Procedures and Analysis

For data collection, a multi-method approach was adopted. This included conducting in-depth interviews with selected MSME representatives to gain insight into their personal experiences and perceptions. Field observations were another crucial component, where the researcher immersed in the tourism environment to observe firsthand the operations and interactions of MSMEs. A thorough review of relevant documents, such as business records, industry reports, and government policies, complemented these primary data sources. This triangulation of methods ensured a robust and comprehensive data collection process. The thematic analysis was the primary method for data analysis. It began with a deep familiarization with the collected data, followed by a meticulous coding process. Codes were assigned to segments of data that were relevant to the research objectives, capturing a variety of descriptive and interpretive aspects. The researcher then reviewed these codes to identify patterns, similarities, and differences, which led to the emergence of key themes. These themes were continuously refined and developed to form a coherent thematic framework, accurately reflecting the depth and nuances of the data.

3.5 Ethical Considerations

Ethical considerations were paramount in the study, with informed consent obtained to ensure participants understood the purpose and their rights. Confidentiality and anonymity were strictly upheld to protect identities and sensitive information. Any ethical dilemmas or conflicts of interest were addressed, maintaining high standards of integrity and conduct.

4. Findings

Table 2: Presentation of key findings

Method	Key Findings	Discussion in Context of Research Objectives and Literature
Interviews	MSMEs reported a significant increase in revenue during the tourist peak season Many businesses expanded their offerings to cater to tourists, creating more employment opportunities There was a noticeable improvement in community infrastructure, funded by increased local revenues	The increased revenue and employment opportunities reported by MSMEs align with research objectives and are consistent with existing studies that link tourism to local economic development.
Focus Group Discussions (FGD)	Most participants agreed that tourism positively impacts local economies. Some expressed concerns about the environmental impact of tourism and potential cultural erosion. A few participants worried about the rising cost of living due to tourism.	Concerns about environmental degradation, cultural erosion, and rising living costs highlight potential downsides of tourism. These findings point to the need for sustainable tourism strategies, a theme frequently found in contemporary research.
Observations	Businesses in high tourist traffic areas seemed to be thriving. Some areas showed visible signs of environmental stress, particularly waste management issues Tourists showed a strong preference for local products and services, directly benefiting local MSMEs.	The observed improvements in community infrastructure suggest that tourism revenues can significantly benefit local communities, a point supported by several studies in the literature. The preference of tourists for local products underscores the direct benefits of tourism to local MSMEs.

Table 2 shows significant findings extracted from the participants and observed by researchers.

Interviews: During interviews with various Micro, Small, and Medium Enterprises (MSMEs), a recurring theme emerged – the significant boost in revenue during peak tourist seasons. As one interviewee noted, *"We saw a remarkable increase in sales during the tourist rush; it's the peak season that keeps our business thriving."* This sentiment was echoed by many, with businesses seizing the opportunity to expand their offerings, consequently generating more job opportunities within the community. A business owner remarked, *"Expanding our services to cater to tourists not only increased our revenue but also allowed us to hire more locals, contributing to community growth."*

Discussion in Context of Research Objectives and Literature: These findings align perfectly with our research objectives, emphasizing the positive correlation between tourism and local economic development. They also resonate with existing literature, which frequently highlights the economic benefits of tourism for local businesses and employment. As previous studies suggest, tourism serves as a catalyst for economic growth in communities, creating a ripple effect of prosperity.

Focus Group Discussions (FGD): In the focus group discussions, participants unanimously agreed on the positive impact of tourism on local economies. *"Tourism brings in much-needed revenue and employment opportunities,"* expressed one participant, capturing the general sentiment. However, amidst the optimism, concerns about the environmental and cultural repercussions surfaced. *"We must address the environmental impact; otherwise, we're sacrificing our natural heritage for short-term gains,"* emphasized another participant, reflecting the apprehensions shared by some.

Discussion in Context of Research Objectives and Literature: These discussions shed light on the multifaceted nature of tourism's impact. While acknowledging its economic benefits, the concerns raised resonate with the growing discourse on sustainable tourism. It underscores the need for balanced development strategies that

mitigate environmental degradation and preserve cultural authenticity, echoing the calls for sustainable tourism practices advocated in contemporary research.

Observations: In our observations, we noted the tangible effects of tourism on local businesses and communities. Businesses in tourist-heavy areas thrived, buoyed by the steady influx of visitors. However, alongside these successes, signs of environmental strain were evident, particularly in waste management issues. Despite this, tourists displayed a strong preference for local products and services, directly benefiting local MSMEs. *"We always look for authentic local experiences,"* remarked a tourist, highlighting the symbiotic relationship between tourism and local businesses.

Discussion in Context of Research Objectives and Literature: The observed prosperity of businesses in tourist hubs reinforces the potential of tourism to uplift local economies. Yet, the environmental challenges serve as a stark reminder of the need for responsible tourism practices. The preference for local products underscores the economic opportunities tourism presents for MSMEs, aligning with existing literature on the subject.

4.1 Discussion

The findings in this study have meaningful implications that connect back to the research objectives and the existing literature. The economic impact of tourism is clear. The reported increased revenue and employment opportunities for MSMEs align with the initial research objectives and mirror findings in existing studies that link tourism to local economic development. In terms of infrastructure development, the improvements observed within community infrastructures suggest that tourism revenues can greatly benefit local communities. The role of digitalization is also very vital to

This assertion is supported by numerous studies in the existing literature, further solidifying the positive impact of tourism on community development. However, not all impacts are entirely positive. The study also uncovers significant concerns about the environmental and social impacts of tourism. Issues such as environmental degradation, cultural erosion, and the rising cost of living underscore the potential downsides of tourism. These findings highlight the critical need for sustainable tourism strategies, a theme that frequently emerges in contemporary research on the topic. Future studies should aim to explore methods that balance economic development with environmental preservation and cultural preservation. This pursuit would further enrich the discourse on sustainable tourism and its impacts on local communities like those in Iloilo, Philippines.

5. Key Outcomes Aligned With Research Objectives

a. Domestic tourism played a pivotal role in boosting the economic development of MSMEs in Iloilo. The majority of the enterprises experienced an uptick in revenue generation and profitability, especially during the tourist peak seasons. Furthermore, domestic tourism directly influenced the creation of job opportunities, leading to a decrease in unemployment in the local community.

b. The influence of domestic tourism was not solely limited to economic factors; it permeated the socio-cultural fabric of Iloilo as well. The influx of tourists brought about discernible shifts in the lifestyles of the locals. While it fostered a cultural exchange, making the community more cosmopolitan in its outlook, there were subtle hints at potential cultural dilution. Social structures evolved, with MSMEs becoming more central to community activities and decisions.

c. Domestic tourism ushered in numerous opportunities for MSMEs in Iloilo. Businesses could diversify their offerings, catering specifically to tourists, which expanded their customer base. Collaborations among MSMEs also saw a rise, capitalizing on joint ventures and tourism packages. However, with opportunities come challenges. Some MSMEs pointed toward the environmental and infrastructural strain the tourist influx posed. There was also a shared concern about maintaining the authenticity of local culture amidst the rapidly evolving tourism landscape.

d. In response to the surge in domestic tourism, MSMEs in Iloilo adeptly implemented a range of strategies to capitalize on its benefits and address challenges. They diversified their offerings tailored to tourist preferences, fostered collaborative ventures, and emphasized sustainable practices. Efforts were also made to preserve local culture and heritage, invest in staff training, integrate feedback mechanisms for continual improvement, and contribute to enhancing local infrastructure. Collectively, these strategic adaptations underscored the MSMEs' proactive role in harnessing the positive impacts of tourism while ensuring community sustainability and cultural integrity.

e. Fluctuations in domestic tourist arrivals in Iloilo significantly influenced the operations and sustainability of MSMEs in the region. Periods of high tourist influx translated into enhanced revenue streams, enabling MSMEs to expand, invest, and innovate. Conversely, downtrends or unpredictability in tourist numbers often posed operational challenges, pressing MSMEs to adapt to variable demand. Such shifts impacted staffing decisions, inventory management, and financial planning. MSMEs that were heavily reliant on consistent tourist numbers faced higher vulnerabilities, underscoring the imperative for adaptive strategies and diversified revenue sources to ensure long-term sustainability amidst tourism volatility.

f. For MSMEs, it was advised to diversify offerings and create adaptable business models that could withstand the fluctuations in tourist arrivals. Regular training programs and workshops could equip them with skills to tap into evolving tourist preferences. Policymakers were encouraged to develop infrastructure that supports tourism, promotes sustainable practices, and creates favorable policies that boost local MSMEs. Collaborative efforts, like forming local tourism boards or alliances, were suggested to foster a unified marketing approach. For other stakeholders, including community leaders and investors, initiatives for community-based tourism, preserving local culture and ensuring an equitable distribution of tourism benefits were recommended. The emphasis was on creating a cohesive strategy involving all stakeholders to ensure that domestic tourism serves as a sustainable tool for socio-economic development.

6. Conclusion and Recommendations

Iloilo's domestic tourism landscape presents a double-edged sword for its Micro, Small, and Medium Enterprises (MSMEs). While the industry injects vibrancy into local economies through increased revenue and jobs, it also raises concerns about environmental degradation, cultural erosion, and rising living costs. This study's findings urge a mindful approach, balancing economic gain with sustainable practices. MSMEs stand to benefit greatly from tourism, but they must embrace their role in promoting responsible practices. Policymakers should craft regulations that safeguard local environments and cultures while fostering tourism's economic benefits. Tourism boards, too, have a crucial role in advocating for sustainable tourism that uplifts local communities and preserves their unique spirit. Further research is essential to delve deeper into sustainable tourism practices and their impact on MSMEs and local communities. By exploring effective policy interventions that promote a balanced tourism sector, Iloilo can ensure its economic prosperity while remaining a cherished destination for generations to come. Furthermore, in today's digital age, the digitization or enhancing of digital presence emerges as an additional dimension for MSMEs to consider. Establishing a robust online presence can amplify visibility, attract a broader audience, and streamline business operations. It serves as a complementary strategy to traditional approaches, facilitating accessibility for tourists while minimizing the environmental footprint associated with physical infrastructure.

Table 3: Recommendations for socio-economic development

Recommendation	Persons Responsible	Timeline	Expected Results
Promotion of Local Culture & Heritage	Department of Tourism, Local Government Units	12 months	Increased attractions, preservation
Infrastructure Development	Local Government Units, Public Works and highways	24 months	Enhanced experience, increased tourism
Capacity Building for MSMEs	Department of Trade & Industry	6 months	Enhanced capabilities, sustainability
Environmental Sustainability	Department of Environment & Natural Resources., MSMEs	Ongoing	Preservation, increased eco-tourism
Collaborative Tourism Initiatives	Department of Tourism, MSMEs	6 months	Increased packages, revenue distribution
Diversification of Tourist Attractions	Department of Tourism	12 months	Varied segments, increased footfalls
Feedback Mechanisms	Department of Tourism, MSMEs	3 months	Continuous improvement
Policy & Regulatory Support	Local Government Units	6 months	Growth and support for MSMEs
Digital Presence	MSME Assoc., Department of Information and Technology	6 months	Increased bookings, visibility

Table 3. indicates the recommendations drawn from the findings of this study that will form basis for enhancing the economic development.

7. Implications of the Findings

The findings emphasize the role of domestic tourism in boosting local economies and signaling to policymakers the importance of supporting this sector. The concerns around environmental stress and cultural erosion highlight the need for policies promoting sustainable tourism practices, such as enforcing regulations on waste management, encouraging eco-friendly accommodations, and incentivizing initiatives that preserve cultural heritage, ensuring long-term benefits for both the economy and the local community. The study's findings can inform MSMEs on strategies to maximize the benefits of tourism, such as adapting their offerings to meet tourist preferences or collaborating with other businesses to leverage tourism opportunities. By shedding light on the impact of tourism on local infrastructure and employment, the study can foster greater community understanding and support for tourism and related initiatives.

Adopting modern trends, like the integration of digitalization as a crucial strategy to further enhance economic benefits of MSMEs and domestic tourism. Digitalization can transform how MSMEs operate and interact with the tourism industry by enabling them to optimize their services, expand their reach, and create a seamless customer experience. Through digital tools such as online marketplaces, booking platforms, and social media, MSMEs can showcase their products and services to a broader audience, including tourists who prioritize convenience and accessibility. For example, MSMEs offering local crafts or culinary experiences can use e-commerce and social media to attract tourists, promote offerings, engage customers, and build loyalty.

The study opens up avenues for further research, particularly around sustainable tourism practices and their effective implementation at the local level. Tourism boards and stakeholders can use these insights to design more effective strategies for promoting domestic tourism while mitigating its potential negative impacts.

References

- Aterido, R., Hallward-Driemeier, M., & Pagés, C. (2011). *Big constraints to small firms' growth? Business environment and employment growth across firms. Economic Development and Cultural Change*, 59(3), 609-647. <https://doi.org/10.1086/65834>
- Ayyagari, M., Demirguc-Kunt, A., & Maksimovic, V. (2011). *Small vs. young firms across the world: contribution to employment, job creation, and growth*. World Bank Policy Research Working Paper Series, 5631.
- Baum, T., & Szivas, E. (2008). *HRD in tourism: A role for government? Tourism Management*, 29(4), 783-794. <https://doi.org/10.1016/j.tourman.2007.09.005>
- Beck, T., Demirguc-Kunt, A., & Maksimovic, V. (2005). *Financial and legal constraints to firm growth: Does firm size matter? The Journal of Finance*, 60(1), 137-177. <https://doi.org/10.1111/j.1540-6261.2005.00727.x>
- Bieger, T., Wittmer, A., & Wittmer, J. (2017). *Transportation mode and travel behavior changes influenced by new access points. Journal of Air Transport Management*, 61, 37-47. <https://doi.org/10.1016/j.jairtraman.2017.02.005>
- Butler, R. W. (2001). *Seasonality in tourism: Issues and implications*. In T. Baum & S. Lundtorp (Eds.), *Seasonality in tourism* (pp. 5-21). Elsevier. <https://www.elsevier.com/books/seasonality-in-tourism/baum/978-0-08-043674-6>
- Canares, M., Llanes, M., & Alenton, R. (2016). *Small is not always beautiful: An assessment of the business environment of tourism-related micro and small enterprises in Boracay Island, Philippines. Journal of Developmental Entrepreneurship*, 21(03), 1650013. <https://www.worldscientific.com/doi/abs/10.1142/S1084946716500131>
- Cuevas, R. B. (2012). *The role of small-scale enterprises in ecotourism: A case study from Palawan, Philippines. ProEnvironment Promediu*, 5(9), 243-246. <http://www.proenvironment.promediu.eu/archive/2012-5/46.pdf>
- Fatoki, O. (2018). *The impact of entrepreneurial resilience on the success of small and medium enterprises in South Africa. Sustainability*, 10(7), 2521. <https://doi.org/10.3390/su10072521>
- Felipe, J., Hasan, R., & Jandoc, K. (2020). *Labor market duality in the Philippines. Asian Development Review*, 37(1), 245-280. https://doi.org/10.1162/adev_a_00146
- Goedhuys, M., & Sleuwaegen, L. (2010). *High-growth entrepreneurial firms in Africa: a quantile regression approach. Small Business Economics*, 34(1), 31-51.
- Mason, P., & Leimkuehler, F. F. (2019). *The relationship between leisure, walking, and happiness of a dog and its owner. Applied Animal Behaviour Science*, 209, 68-73. <https://doi.org/10.1016/j.applanim.2018.10.006>
- Nieminen, E. (2010). *Experience production: Functionality and content from a customer perspective. Tourism Review*, 65(3), 41-50. <https://doi.org/10.1108/16605371011074402>
- OECD. (2020). *COVID-19: SME policy responses. OECD Policy Responses to Coronavirus (COVID-19)*. <https://doi.org/10.1787/6f6a7f93-en>
- Page, S. J. (2007). *Tourism management: Managing for change*. Elsevier. <https://www.elsevier.com/books/tourism-management/page/978-0-7506-8079->
- Page, S. J., & Connell, J. (2014). *Tourism: A Modern Synthesis*. Cengage Learning.

- Petroman, I., Petroman, C., Dincu, A. M., Bădulescu, D., Bădulescu, L., & Sferle, M. (2012). *Aspects concerning the role of tourism for local communities' development*. *ProEnvironment Promediu*, 5(8), 145-149.
<http://www.proenvironment.promediu.eu/archive/2012-5/25.pdf>
- Philippine Department of Tourism. (2020). *2020 Tourism Statistics*.
- Philippine Statistics Authority. (2018). *2018 List of Establishments*.
<https://psa.gov.ph/sites/default/files/attachments/hsd/pressrelease/2018%20List%20of%20Establishments.pdf>
- Philippine Statistics Authority. (2020). *Philippine Tourism Satellite Accounts: 2019*.
<https://psa.gov.ph/sites/default/files/attachments/hsd/specialrelease/2019%20PTSA%20Press%20Release.pdf>
- Sigala, M. (2020). *Tourism and COVID-19: Impacts and implications for advancing and resetting industry and research*. *Journal of Business Research*, 117, 312-321. <https://doi.org/10.1016/j.jbusres.2020.06.015>
- Sukartiko, P. (2017). The influence of domestic and foreign tourist visits on the craftsmen's income at Sukawati Art Market, Bali Province. *IOSR Journal of Humanities and Social Science (IOSR-JHSS)*, 22(7), 34-40. [https://www.iosrjournals.org/iosr-jhss/pages/22\(7\)Version-3.html](https://www.iosrjournals.org/iosr-jhss/pages/22(7)Version-3.html)
- Thomas, R. (2000). Small firms in the tourism industry: Some conceptual issues. *International Journal of Tourism Research*, 2(5), 345-353. [https://doi.org/10.1002/1522-1970\(200009/10\)2:5<345::AID-JTR216>3.0.CO;2-B](https://doi.org/10.1002/1522-1970(200009/10)2:5<345::AID-JTR216>3.0.CO;2-B)
- Timothy, D. J. (2011). *Cultural heritage and tourism: An introduction (Aspects of Tourism Texts series, Vol. 2)*. Channel View Publications. <https://www.multilingual-matters.com/page/detail/?k=9781845411922>
- UNWTO. (2019). *Tourism Highlights 2019 Edition*. United Nations World Tourism Organization.

Assessing an Eco-Destination Management Structure: A Case Study

João Carvalho, Sónia Nogueira and Luís Pacheco

REMIT-Prince Henry Portucalense University, Porto, Portugal

joao.carvalho@upt.pt

snogueira@upt.pt

luisp@upt.pt

Abstract: Ecotourism is very important in contributing to the development of a healthier way to do tourism and, at the same time, to the wealth of a territory. This study aims to assess a relevant case study – Peneda-Gerês National Park (PGNP), in Portugal, applying a new model approach to managing eco-destinations. The results show that all aspects predicted by the ATOS (Aims, Tools, Operational domains, and Stakeholders) model are present in PGNP management except for one: promoting cultural exchange and understanding. This empirical substantiation of the proposed model analysis opens the possibility of influencing ecotourism management practice, helping to perform private and public audits of eco-destinations in any part of the world. Moreover, it contributes to framing the development of new sustainable eco-activities and eco-destinations.

Keywords: Ecotourism management model, Responsible travel, Societal sustainability, Eco-destination, Destination marketing, Protected area

1. Introduction and Framework

Tourism is one of the most dynamic sectors of the global economy, making its entrepreneurial structure pivotal. Ecotourism and sustainability have gained significance in contemporary society, fostering local development in eco-destinations and incorporating rural and cultural tourism in sensitive natural areas (Kasalak, Akinci, and Yurcu, 2016). Recognizing its economic impact (The Business Research Company, 2023), recent studies have explored various management concepts for ecotourism. Several frameworks exist for managing recreational outdoor activities, but there is a lack on an easy and straightforward management tool to assess ecotourism activities. This gap led Carvalho et al (2024) to developing a new model to assess ecotourism management structure based on an extensive literature review. In this context, place-making emerged as a key strategy for positioning eco-destinations in global markets, balancing sustainability with development, and encouraging tourist loyalty (Serralvo and Furrier, 2005; Habibah et al, 2013). Effective destination marketing should emphasize key attributes, aligning the destination's identity with external perceptions (García-Madurga et al, 2019; Nogueira and Carvalho, 2022). Moreover, the concept of 'destination' encompasses physical and natural attributes, a mix of products and services, and psychological experiences (Buhalis, 2000; Vengesai, 2003). Destination image assessments should also include sustainability dimensions (Lee and Xue, 2020). Collaborative planning between private and public entities is essential for creating quality experiences and developing eco-destinations (Rivera and Croes, 2010). Ecotourism, thus, represents inclusive and sustainable tourism, crucial for rural economic development (Baloch et al, 2023; Ketema, 2015; Kim and Park, 2017).

Ecotourism is fundamentally intertwined with community benefits, environmental conservation, and sustainable practices. It emphasizes education and responsible travel, leveraging the natural and cultural heritage of destinations. Successful ecotourism requires stakeholder collaboration, careful planning, and responsible marketing (Cabral and Dhar, 2020; Fennell, 2001; Weaver and Lawton, 2007). Key elements include focusing on natural areas, sustainable practices, conservation efforts, and local community benefits (Chandel and Mishra, 2016). Stakeholders must align on goals to protect ecosystems, minimize negative impacts, and enhance community well-being (Garrod, 2003; Batool et al, 2021). Since the 1990s (e.g., Blamey, 1997; Buckley, 1994; Pedersen, 1991; Sirakaya, Sasidharan, and Sönmez, 1999), literature advocated for nature-based ecotourism managed with ecological, socio-cultural, and economic sustainability, involving local communities. Effective ecotourism management requires a model that ensures stakeholder agreement on objectives, resource conservation, and minimal environmental impact (Batool et al, 2021; Ceballos-Lascurain, 1996; Kusumarto et al, 2019). Moreover, carrying capacity considerations are crucial for preserving natural ecosystems (Fei et al, 2023; Salemi et al, 2019).

Ecotourism's evolving nature links it to sustainable tourism, emphasizing responsible, ethical, and community-beneficial travel. Critics argue that sustainable management is essential to avoid negative environmental impacts (Baral, 2014). Thus, community-based ecotourism could involve greater community control and benefits, enhancing ecosystems and empowering residents (Tesfaye, 2017; Weaver and Lawton, 2007). Despite controversies around sustainable tourism concepts, integrating their principles into ecotourism is essential for

achieving societal sustainability (Pasgaard et al, 2021). Government support and regulatory frameworks are also crucial for the success of ecotourism ventures (Musavengane and Matikiti, 2015). Collaboration among stakeholders supports sustainability efforts and enhances the tourism experience (Roxas, Rivera, and Gutierrez, 2020). As such, sustainable ecotourism must involve local and external stakeholders, including authorities, businesses, communities, and tourists.

Effective ecotourism management ensures the protection of cultural and natural heritage, economic benefits, community well-being, environmental preservation, and responsible travel, promoting sustainable tourism development (Atieno and Njoroge, 2018; Donohoe, 2011; UNWTO/MST, 2016; Weaver and Lawton, 2007). In this context, strategic planning and stakeholder cooperation are vital for preserving eco-destinations and ensuring long-term benefits (Backman, Petrick, and Wright, 2001; Gök, 2022). This comprehensive approach ensures ecotourism contributes positively to local economies, cultural preservation, and environmental sustainability.

Thus, this paper aims to empirically substantiate the ecotourism management model assessment proposed by Carvalho et al (2024), through its application to an important National Park. This objective led to the following research question: are the aspects predicted by the assessment model confirmed by the case study?

The next section presents the theoretical framework, followed by the methodology, results, and final remarks.

2. Methods

One chose a relevant case study, Peneda-Gerês National Park to analyse its official documents to explore their coverage of all strategic management aspects predicted in the literature and systematised in the ATOS model. All needed data is available online on the site: <https://www.icnf.pt/cogestao/cgparquenacionaldapenedageres>. The thematic analysis of the main strategic management documents followed the themes and categories provided for the assessment model. However, we tried to verify whether all the planned measures added any new theme or category not foreseen in the literature and included in the model.

2.1 The Model for the Assessment of Eco-Destination Management Structure

Based on an extensive literature review, Carvalho et al (2024, p.7) defined ecotourism management “as an activity that plans, organises, coordinates, and controls ecotourism, implying the cooperation of all stakeholders, societal sustainability, and responsible travel”. This model was called ATOS because it relies on four main aspects of the structure of an eco-destination management: **Aims**, which are related to societal sustainability and responsible travel; **Tools** needed for those aims that are related to the existence of a marketing system, and a systematic conservation planning; **Operational domains**, which are related to preserving local cultures, promoting cultural exchange and understanding, providing educational and meaningful experiences, preserving natural, tangible and intangible heritage, and social environments, minimising negative environmental impacts, supporting conservation efforts, and providing well-being and financial benefits to local communities; and **Stakeholders** intervention, which are crucial for the achievement of the operational domains of ecotourism management.

2.2 Study Site – Peneda-Gerês National Park (North of Portugal)

The PGNP is the most important national park (protected area) created by the Decree-Law nº 187/71 of 8th May, with several attractions for tourists who seek nature tourism and ecotourism, offering them a unique natural landscape in the north of Portugal, close to the Spanish border, which forms a continuous landscape with the Natural Park of Baixa Limia-Serra do Xurés, in the Municipality of Lórbios, in Spain. PGNP is characterized by being an area with enough samples that exhibit the region's characteristics, in terms of natural and humanized landscapes, elements of biodiversity, and natural sites, with scientific, ecological, or educational value. It occupies an area of 69,596 ha, spread over five municipalities: Melgaço, Arcos de Valdevez, Ponte da Barca, Terras de Bouro, and Montalegre (Figure 1).

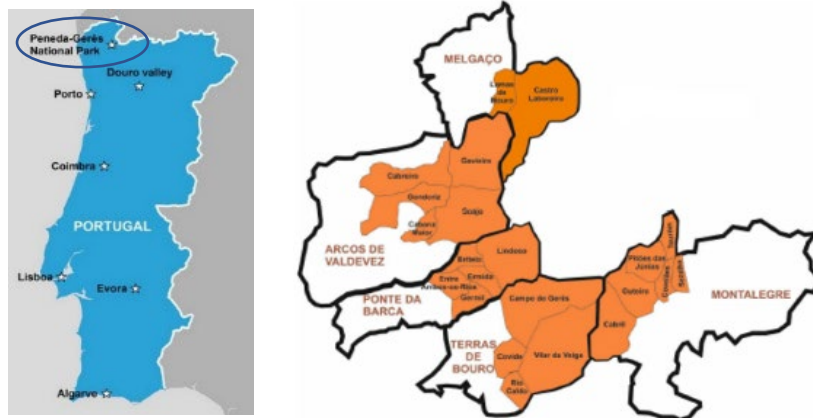


Figure 1: Peneda-Gerês National Park map

In May 2009, the territory defined by the administrative boundary of the municipalities belonging to the Trans-frontier Park was declared a World Biosphere Reserve. It is a rugged mountainous region, with altitudes generally above 700 meters, reaching 1545 meters in Nevosa (Gerês Mountain). It covers the Peneda, Soajo, Amarela, and Gerês mountains and the Castro Laboreiro and Mourela plateaus. Due to its geographic situation, the PGNP is influenced by the Atlantic, Mediterranean, and continental climates, which allows the appearance of plants adapted to the most diverse climatic conditions. It is thus characterized by an enormous botanical diversity, having several endemic species and others of high value for nature conservation.

Thanks to the diversity of natural habitats, the PGNP has a remarkable faunal diversity, with several endemic, rare, or limited species in Portugal. Two hundred forty-six vertebrates are identified: 161 birds, 40 mammals, 11 fish (including five introduced species), 20 reptiles, and 13 amphibians. Of these, 53 belong to the endangered species list of the 'Red Book of Vertebrates of Portugal'. Large mammals, such as the Iberian wolf (*Canis lupus*), the roe deer (*Capreolus capreolus*), the mountain goat (*Capra pyrenaica*), and even the garron (domestic species), are those that usually focus more attention.

The region provides experiences to the visitors, natural resources, and the continuity of the community's culture, ensuring that sustainable tourism does not adversely impact the culture and the community, as the local community is vital in tourism planning and management. Thus, its strategic product is ecotourism, which considers an active and contemplative nature and includes complementary products like history and culture, gastronomy and wines, health and well-being, and nautical activities. The local authorities try to communicate with strategic markets like Portugal, Spain, France, Germany, and the United Kingdom, as well as countries like the Netherlands, the USA, and Brazil as secondary markets.

All these factors make PGNP a relevant case to study in an ecotourism management strategy.

2.3 Co-Management Commission

The Decree-Law No.116/2019, of August 21st, instituted the model of co-management of protected areas at the national level, with the objectives of creating a shared dynamic of valuing the protected area, based on its sustainability, establishing concerted procedures aimed at better performance in safeguarding natural values and responding to society's requests, and generating a relationship closer to citizens and relevant entities to promote development sustainability of each protected area (Order no.3022/2021, of March 19th).

Thus, the PGNP co-management committee has the following composition:

- The Mayor Arcos de Valdevez, who presides the committee;
- The regional director of Nature Conservation and Northern Forests;
- Representative of the University of Minho;
- Representative of environmental and similar non-governmental organizations designated by the Portuguese Confederation of Environmental Defense Associations;
- Representative of the Association for the Development of the Regions of the PGNP;
- Representative of the Atlantic Forest Association;
- Representative of the Regional Directorate of Agriculture and Fisheries of the North.

The term of office of the co-management committee is four years.

The Commission is responsible for (CCOR, 2019):

- Ensure that co-management of the protected area is carried out in compliance with the duty of care to safeguard the resources and territorial values that underlie the classification of the protected area;
- Contribute to the development of local activities in harmony with present values, incorporating innovation and creativity;
- Enable environmental, economic and social promotion, awareness-raising and communication actions, through the development and implementation of co-management instruments in the protected area;
- Promote actions, in conjunction with different regional agents and central and local Administrations, for the integrated development of the protected area, as well as stimulating participation and civil society initiative, namely through awareness-raising actions and educational projects;
- Encourage partnerships with promoters, companies, research centres, training institutions, and municipalities aimed at planning and implementing actions for the sustainable valorisation of the territory, actions associated with agriculture, pastoralism, hunting, fishing, culture, and nature tourism;
- Promote debate about the activities and actions that take place in the protected area and encourage good management practices for their sustainable use and exploitation;
- Provide the necessary information to ensure coherence and complementarity between the various bodies and entities, with a view to the sustainable and integrated development of the protected area;
- Communicate with all public and private entities involved in the protection and valorisation of natural capital, interpreting and disseminating the main attributes existing in the protected area, and raising awareness of the most appropriate ways of preserving and valuing them;
- Develop and approve management instruments, following the opinion of the strategic council;
- Execute management instruments;
- Consult the strategic council on matters of interest for the enhancement of the protected area;
- Identify the instruments and lines of financing to support the implementation of the co-management plan for the protected area and support potential beneficiaries to access these same lines;
- Monitor the preparation, amendment, or review of the special protected area program;
- Prepare and approve the internal regulations necessary for its good performance;
- Entrepreneurs and the general public must always disseminate and guarantee knowledge of the relevant information produced within the scope of co-management, including information relating to financing instruments.

The protected area management instruments are the co-management plan, the annual activity and budget plan, the annual activity execution report, and other instruments agreed upon by the protected area co-management committee that obtain a prior opinion from the respective strategic council (INFG – Institute for Nature and Forest Conservation).

2.4 PGNP Co-Management Plan 2022-2027

The PGNP Co-management Plan constitutes the strategic reference for the protected area for the period 2022–2027. It aims to create a shared dynamic of valuing the protected area based on its sustainability in the political, social, economic, ecological, territorial, and cultural dimensions with a specific focus on the areas of promotion, awareness, and communication.

It was prepared by the Co-management Committee, and its approval was preceded by a Public Consultation during 20 working days (between November 18, 2022, and December 20, 2022), and 5 public presentation sessions of this document were also held (December 12 2022, in Arcos de Valdevez, December 13, 2022, Terras de Bouro, December 14, 2022, in Ponte da Barca, December 14, in Montalegre, and December 15, 2022, in Melgaço).

It obtained a prior opinion from the Strategic Council on January 31, 2023, and was approved by the Co-management Committee, also on January 31, 2023.

The Strategic Council is a body of the INFC of a consultative nature that works within each protected area of national interest and includes a representative of the INFC, representatives appointed by scientific institutions, and experts of proven merit in the fields of nature conservation and biodiversity, and representatives appointed by central administration services, municipal councils, parish councils and non-governmental environmental

organizations (<http://areasprotegidas.icnf.pt/cestrategicos/index.php/78-conselho-estrategico/71-conselho-estrategico>).

3. Results

The data analysis about what the PGNP management has done are implicit in the thematic analysis. Table 1 presents the evidence discovered in the official documents of the PGNP, which describe all the processes that are used to develop the co-management system.

Table 1: Evidence of strategic management structure using the ATOS model

Themes	Categories	Citations and references
Aims	Sustainability	PGNP.5 (n.d.); PGNP.6 (n.d.). Promote the compatibility of the protection of natural resources and values with human activities, aiming at the region's sustainable development, contributing to the settlement of populations, and improving their quality of life (PGNP.1, p.13). Promoting sustainable development of the National Park has benefited from growing understanding and strengthening institutional cooperation at local, regional, and cross-border levels, contributing to the joint definition of priorities (PGNP.3, p.19). Contribute to affirming biodiversity, geodiversity, and natural and cultural capital as fundamental resources for the sustainable development of the PGNP territory, investing in proximity, participatory and collaborative management based on knowledge, innovation, and valorisation of its resources, which ensures a harmonious coexistence between human activities and nature, as a legacy for future generations (PGNP.6, p.19).
	Responsible travel	PGNP.5 (n.d.); PGNP.6 (n.d.). Organize and promote a sustainable visitation regime to raise awareness and mobilize society to conserve the present natural and cultural heritage (PGNP.1, p.13).
Tools	Eco-destination regulation and management	Order no.3022/2021; INFC (n.d.). PGNP.1 (n.d.); PGNP.4. (n.d.); PGNP.5 (n.d.); PGNP.6 (n.d.); PGNP.7 (n.d.); PGNP.8 (n.d.).
	Marketing system	PGNP.5 (n.d.); PGNP.6 (n.d.). Consolidate and publicize the PNPG as a territorial unit, facilitating its perception as an entity through appropriate means of promotion and communication (internal and external), interacting with different audiences (local population, visitors, schools, researchers, companies, institutions, etc.) and positioning the territory in the national and international context (PGNP.3, p.28).
	Systematic conservation planning	PGNP.5 (n.d.); PGNP.6 (n.d.). Promote environmental valorisation, the efficient use of resources, and the management of territory with multiple services, seeking to harmonise existing human activities with the protection, valorisation and sustainable management of natural resources and combating all forms of pollution and environmental aggression that can jeopardise the sustainable development and differentiation of the National Park's natural capital. Promote the preservation and restoration of ecological processes, biodiversity, and geodiversity, as well as knowledge, dissemination, management, and monitoring of natural resources and values (PGNP.3, p.29). The PGNP Co-management Plan is the document that establishes the strategy and programming basis for a set of investments over five years, oriented towards the fundamental objectives of co-management, that is, towards the sustainable development of this protected area. The PGNP Co-management Plan is based on a strategic planning work for the sustainable development of the PNPG (PGNP.6, p.8).
Operational domains	Preserving local cultures	PGNP.5 (n.d.); PGNP.6 (n.d.). It combined the objectives of visitation with those of requalification and preservation of historical and cultural heritage, namely creating museum centres and thorough the musealisation of heritage sites and structures to make them visitable and to value local culture (PGNP.6, p.42).

Themes	Categories	Citations and references
	Promoting cultural exchange and understanding	without evidences.
	Providing educational and meaningful experiences	PGNP.5 (n.d.); PGNP.6 (n.d.). Ensure the protection of scenic values for cultural, scientific, educational and recreational purposes (PGNP.1, p.13). PGNP Doors also develops educational and environmental interpretation activities for schoolchildren and other specific groups. They also include other offers for visitors, namely leisure spaces, the Mezio Biological Park, Star Observation Park, and observatories, among other equipment. Services linked to promoting local culture, such as museums and museum centres, are also mentioned. They are essential visiting structures and have contributed significantly to preserving and disseminating historical and cultural heritage, with very positive results in terms of appreciation and tourist attraction in the region (PGNP.3, p.18).
	Preserving natural, tangible, and intangible heritage, and social environments	PGNP.5 (n.d.); PGNP.6 (n.d.). Conserve material and intangible cultural heritage to preserve identity and collective memory (PGNP.1, p.13).
	Minimizing negative environmental impacts	PGNP.5 (n.d.); PGNP.6 (n.d.). Although important for the local economy, increasing the number of visitors should not be a primary objective for the Park region, considering that it is more important to achieve a more outstanding balance in the temporal and spatial distribution of visitors throughout the year and an expansion the average length of stay of tourists. This situation is also the most convenient regarding the region's carrying capacity (PGNP.3, p.16).
	Supporting conservation efforts	PGNP.5 (n.d.); PGNP.6 (n.d.). Preserve and restore ecological processes, biodiversity, and geodiversity, namely through promoting the expansion of climax native vegetation, to ensure the proper functioning of ecosystem services (PGNP.1, p.13).
	Providing well-being and financial benefits to local communities	PGNP.5 (n.d.); PGNP.6 (n.d.). In activities directly or indirectly linked to tourism, there is greater economic dynamism regarding the employed population and number of companies. The sector's dynamics are mainly based on the richness and diversity of the Park's natural and cultural heritage and the recognition of its status as the only National Park in the country. It also benefits from the projection facilitated by UNESCO's declaration as a World Biosphere Reserve. In certain parishes, tourism is already the main economic activity (PGNP.3, p. 15).
Themes	Categories	Citations and references
Stakeholders	Local population, local authorities, ecopreneurs, environmentalists, tourists, and government	PGNP.2 (n.d.); PGNP.5 (n.d.); PGNP.6 (n.d.). Also noteworthy is the role of local development associations, which operate at various levels and with common development objectives and which in some way have contributed to the establishment of strategic lines of action in the territory, particularly concerning training for employability in emerging activities, support for economic activities and valorisation of local products, requalification of rural areas and built heritage, valorisation of natural and cultural heritage, qualification and tourism promotion, among others (PGNP.3, p. 15). The PGNP plan reflects the vision shared by different institutions in the territory, namely municipalities, those responsible for the areas of nature conservation and forests, agriculture, academia, local development associations and NGOs, waste management entities and landowners, representatives of tourism entrepreneurs, companies and other relevant institutions (PGNP.6, p.8).

4. Discussion and Final Remarks

As such, it was possible to answer to the research question. The assessment model can frame all aspects of ecotourism management, as one can verify with the relevant case study of PGNP. One can notice that all aspects predicted by the model are present in PGNP management except for promoting cultural exchange and understanding. As indicated in the literature (e.g., Backman, Petrick, and Wright, 2001; Donohoe, 2011; Gök, 2022), this topic needs to be more explicit in the strategic plan of the PGNP. This issue is essential to promote human and cultural relationships among different cultures in an increasingly globalised world. Nevertheless, it

is possible to conclude that PGNP managers propose strategies for almost all aspects concerning effective eco-destination management systematised by the model.

This model was supported by an extensive analysis of previous systematic literature reviews and other articles that analysed management systems for many different cases of ecotourism. As such, one can conclude that the model can be applied in different contexts, both in terms of creating an eco-destination and its management and promotion, always aiming at its planned conservation with the involvement of all stakeholders. Notice that the previous literature review (Carvalho et al, 2024) was conducted until a theoretical saturation about ecotourism and how it can be managed and developed was achieved. Consequently, the literature review gave us a comprehensive definition of what creating an ecotourism activity might entail. In this context, to create a model for general application, we sought to deepen and detail all the necessary aspects in the various cases, achieving a synthesis presented in the model: Aims, Tools, Operational domains, and Stakeholders (ATOS).

The ATOS model could help public and private managers and policymakers reflect on all issues involved and the cultural exchange between tourists and local people, contributing to more cultural understanding. Thus, this paper concludes that managing an ecotourism activity is crucial to developing an eco-destination management and marketing system with a systematic conservation plan to achieve societal sustainability at all economic, ecological, social, and psychological levels and promote responsible travel. All stakeholders should be heard to commit everyone to implementing the management model. In practice, the domains that should be considered are the preservation of local cultures, as well as natural, tangible and intangible heritage, and social environments; promoting cultural exchange and understanding; providing educational and meaningful experiences; minimising negative environmental impacts; supporting conservation efforts; and providing well-being and financial benefits to local communities. In summary, it is crucial to preserve eco-destinations to maintain their attractive capacity. On the other hand, one needs to manage ecotourism activities to respect a place's carrying capacity, promoting societal sustainability and responsible travel.

This study's main limitations concern the fact that only one eco-destination was evaluated, and only the official documents were analysed. Still, it is possible for future studies to address the results of those strategic intentions, hear the stakeholders, and enlarge the application of the ATOS model to other ecotourism destinations.

Acknowledgments

This work was supported by the UIDB/05105/2020 Program Contract, funded by national funds through the FCT I.P.

References

- Atieno, L. and Njoroge, J.M. (2018) "The ecotourism metaphor and environmental sustainability in Kenya", *Tourism and Hospitality Research*, Vol.18 No.1, pp.49–60. <https://doi.org/10.1177/1467358415619671>
- Backman, S., Petrick, J. and Wright, B.A. (2001) "Management tools and techniques: an integrated approach to planning", in D.B. Weaver (ed.) *The encyclopedia of ecotourism*. Wallingford, UK: CABI Publishing, pp.451–461.
- Baloch, Q. B., Shah, S. N., Iqbal, N., Sheeraz, M., Asadullah, M., Mahar, S. and Khan, A. U. (2023) "Impact of tourism development upon environmental sustainability: a suggested framework for sustainable ecotourism", *Environmental Science and Pollution Research*, Vol.30, pp.5917–5930. <https://doi.org/10.1007/s11356-022-22496-w>
- Baral, N. (2014) "Assessing the temporal stability of the ecotourism evaluation scale: testing the role and value of replication studies as a reliable management tool", *Journal of Sustainable Tourism*, Vol.23 No.2, pp.1-14. <http://dx.doi.org/10.1080/09669582.2014.953541>
- Batool, N., Dada, Z. A., Shah, S. and Ganai, S. A. (2021) "Interactive relationship between the environmental concern and the eco-tourism destination regions: a literature review", *Alinteri Journal of Agriculture Sciences*, Vol.36 No.1, pp.457-465. <https://doi.org/10.47059/alinteri/V36I1/AJAS21067>
- Blamey, R. (1997) "Ecotourism: the search for an operational definition", *Journal of Sustainable Tourism*, Vol.5, pp.109–130. <https://doi.org/10.1080/09669589708667280>
- Buckley, R. (1994) "A framework for ecotourism", *Annals of Tourism Research*, Vol.21 No.3, pp.661–665. [https://doi.org/10.1016/0160-7383\(94\)90126-0](https://doi.org/10.1016/0160-7383(94)90126-0)
- Buhalis, D. (2000) "Marketing the competitive destination for the future", *Tourism Management*, Vol.21 No.1, pp.97–116. [https://doi.org/10.1016/S0261-5177\(99\)00095-3](https://doi.org/10.1016/S0261-5177(99)00095-3)
- Cabral, C. and Dhar, R.L. (2020) "Ecotourism research in India: from an integrative literature review to a future research framework", *Journal of Ecotourism*, Vol.19 No.1, pp.23–49. <https://doi.org/10.1080/14724049.2019.1625359>
- Carvalho, J.M.S., Ramazanov, M., Pacheco, L., Durão, M. and Nogueira, S. (2024) "Strategic Management Structure of an Eco-Destination" in J.V. Carvalho, A. Abreu, M. Franco, P. Liberato (eds) *Advances in Tourism, Technology and Systems: Selected Papers from ICOTTS 2024*, Singapore, Springer Nature, in press.

- CCOR – Co-management commission operating regulations. (2019) <https://www.icnf.pt/api/file/doc/07e56f5d6c04b104>
- Ceballos-Lascurain, H. (1996) *Tourism, ecotourism and protected areas: The state of nature-based tourism around the world and guidelines for its development*. Gland (Switzerland and Cambridge, UK): IUCN Library System.
<https://doi.org/10.2305/IUCN.CH.1996.7.en>
- Chandel, A. and Mishra, S. (2016) "Ecotourism revisited: last twenty-five years", *Czech Journal of Tourism*, Vol.5 No.2, pp.135-154. <https://doi.org/10.1515/cjot-2016-0008>
- Donohoe, H.M. (2011) "A Delphi toolkit for ecotourism research", *Journal of Ecotourism*, Vol.10 No.1, pp.1-20.
<https://doi.org/10.1080/14724040903418897>
- Fei, Guangyu., Xiong, K., Fei, Guanghui., Zhang, H. and Zhang, S. (2023) "The conservation and tourism development of World Natural Heritage sites: the current situation and future prospects of research", *Journal for Nature Conservation*, Vol.72, 126347. <https://doi.org/10.1016/j.jnc.2023.126347>
- Fennell, D.A. (2001) "A content analysis of ecotourism definitions", *Current Issues in Tourism*, Vol.4 No.5, pp.403-421.
<http://dx.doi.org/10.1080/13683500108667896>
- García-Madurga, M.-Á., Esteban-Navarro, M.-Á., Delgado-de-Miguel, J.-F. and Menchero, T.B.-L. (2019) "Positioning axes of sustainable tourist destinations: the case of Aragón", *Sustainability*, Vol.11, 4885.
<http://dx.doi.org/10.3390/su11184885>
- Garrod, B. (2003) "Local participation in the planning and management of ecotourism: a revised model approach", *Journal of Ecotourism*, Vol.2 No.1, pp.33-53. <http://dx.doi.org/10.1080/14724040308668132>
- Gök, H.S. (2022) "Ecotourism routes of Isparta and their investigation with PESTE analysis", *DEU Journal of GSSS*, Vol.24 No.3, pp.1247-1282. <http://dx.doi.org/10.16953/deusosbil.1102607>
- Habibah, A., Mushrifah, I., Hamzah, J., Er, A.C., Buang, A., Toriman, M.E., Selvadurai, S. and Zaimah, R. (2013) "Place-making of ecotourism in Tasik Chini: from exploratory to the contemporary biosphere reserve", *Asian Social Science*, Vol.9 No.6, pp.84-95.
- INFC – Institute for Nature and Forest Conservation. (n.d.) <https://www.icnf.pt/cogestao/cgparquenacionaldapenedageres>
- Kasalak, M.A., Akinci, Z. and Yurcu, G. (2016) "Ecotourism Entrepreneurship, the Features of Ecotourism Entrepreneurship, Problems and Solutions", in C. Avcikurt, M.S. Dinu, N. Hacioglu, N. Efe, A. Soykan and N. Tetik (eds), *Global Issues and Trends in Tourism*. St. Kliment Ohridski University Press, pp.596-601.
- Ketema, T.D. (2015) "Development of community based ecotourism in Wenchi Crater Lake, Ethiopia: challenges and prospects", *Journal of Hospitality Management and Tourism*, Vol.6 No.4, pp.39-46.
<https://doi.org/10.5897/JHMT2014.0133>
- Kim, K.-H. and Park, D.-B. (2017) "Relationships among perceived value, satisfaction, and loyalty: community-based ecotourism in Korea", *Journal of Travel & Tourism Marketing*, Vol.34 No.2, pp.171-191.
<https://doi.org/10.1080/10548408.2016.1156609>
- Kusumoarto, A., Hidayat, R., Jubei, S. and Ernawati, A. (2019) "Ecotourism management structuring at the Salak Mountain II Resort, Halimun Salak National Park", *E-Journal of Tourism*, Vol.6 No.2, pp.281-302.
<https://doi.org/10.24922/eot.v6i2.45761>
- Lee, S.W. and Xue, K. (2020) "A model of destination loyalty: integrating destination image and sustainable tourism", *Asia Pacific Journal of Tourism Research*, Vol.25 No.4, pp.393-408. <https://doi.org/10.1080/10941665.2020.1713185>
- Musavengane, R. and Matikiti, R. (2015) "Does social capital really enhance community based ecotourism? A review of the literature", *African Journal of Hospitality, Tourism and Leisure*, Vol.4 No.1. Available from:
<http://www.ajhtl.com/uploads/7/1/6/3/7163688/article27vol4-1-2015-jan-june2015.pdf>
- Nogueira, S., and Carvalho, J.M.S. (2022) "Unlocking the dichotomy of place identity/place image and its impact on place satisfaction for ecotourism destinations", *Journal of Ecotourism*, Vol.23 No.1, pp.1-19.
<https://doi.org/10.1080/14724049.2022.2106236>
- Order no.3022 (2021) <https://files.diariodarepublica.pt/2s/2021/03/055000000/0003100032.pdf>
- Pasgaard, M., Fold, N., Meilby, H. and Kalvig, P. (2021) "Reviewing tourism and natural resource research in the Arctic: towards a local understanding of sustainable tourism in the case of South Greenland", *Geografisk Tidsskrift-Danish Journal of Geography*, Vol.121 No.1, pp.15-29. <https://doi.org/10.1080/00167223.2020.1869574>
- Pedersen, A. (1991) "Issues, problems, and lessons learned from ecotourism planning projects", in J. Kusler (ed.) *Ecotourism and Resource Conservation: A Selection of Papers*. Second international Symposium on Ecotourism and Resource Conservation. Madison: Omnipress, pp. 61-74.
- PGNP.1. (n.d.) *Characterization of the protected area*. <https://www.icnf.pt/api/file/doc/553dfe36195936ce>
- PGNP.2. (n.d.) *Main actors*. <https://www.icnf.pt/api/file/doc/2c354b724e4a1b63>
- PGNP.3. (n.d.) *Prospective diagnosis of the protected area*. <https://www.icnf.pt/api/file/doc/e65438ebbed43210>
- PGNP.4. (n.d.) *Co-management in National Park of Peneda-Gerês: promote, communicate and raise awareness*.
<https://www.icnf.pt/api/file/doc/3f6d002c11d13e69>
- PGNP.5. (n.d.) *Action Program*. <https://www.icnf.pt/api/file/doc/6744594627becc06>
- PGNP.6. (n.d.) *Co-management plan – summary*. <https://www.icnf.pt/api/file/doc/f9b9c79d68c1ffd4>
- PGNP.7. (n.d.) *Plan 2021*. <https://www.icnf.pt/api/file/doc/7de4f913e4672f49>
- PGNP.8. (n.d.) *Plan 2022*. <https://www.icnf.pt/api/file/doc/d7b56d99c13403b7>
- Rivera, M.A. and Croes, R. (2010) "Ecotourists' loyalty: will they tell about the destination or will they return?", *Journal of Ecotourism*, Vol.9 No.2, pp.85-103. <https://doi.org/10.1080/14724040902795964>

- Roxas, F.M.Y., Rivera, J.P.R. and Gutierrez, E.L.M. (2020) "Framework for creating sustainable tourism using systems thinking", *Current Issues in Tourism*, Vol.23 No.3, pp.280-296. <https://doi.org/10.1080/13683500.2018.1534805>
- Salemi, M., Jozi, S.A., Malmasi, S. and Rezaian, S. (2019) "Conceptual framework for evaluation of ecotourism carrying capacity for sustainable development of Karkheh protected area, Iran", *International Journal of Sustainable Development & World Ecology*, Vol.26 No.4, pp.354-366. <https://doi.org/10.1080/13504509.2019.1570379>
- Serralvo, F.A. and Furrier, M.T. (2005) "Tipologías del posicionamiento de marcas. un estudio conceptual en Brasil y en España", *Revista Galega de Economía*, Vol.14 No.1-2, pp.1-15.
- Sirakaya, E., Sasidharan, V. and Sönmez, S. (1999) "Redefining ecotourism: the need for a supply side view", *Journal of Travel Research*, Vol.38 No.2, pp.168-172. <https://doi.org/10.1177/004728759903800210>
- Tesfaye, S. (2017) "Challenges and opportunities for community based ecotourism development in Ethiopia", *African Journal of Hospitality, Tourism and Leisure*, Vol.6 No.3. Available from: http://www.ajhtl.com/uploads/7/1/6/3/7163688/article_28_vol_6_3_2017.pdf
- The Business Research Company. (2023) *Ecotourism Global Market Report*. Available from: <https://www.thebusinessresearchcompany.com/report/ecotourism-global-market-report>
- UNWTO/MST – United Nations World Tourism Organization/Measuring Sustainable Tourism. (2016) *UNWTO Statistics and Tourism Satellite Account Programme - Measuring Sustainable Tourism: Developing a statistical framework for sustainable tourism*. Available from <https://webunwto.s3-eu-west-1.amazonaws.com/2019-08/mstoverviewrev1.pdf>
- Vengesai, S. (2003) "A conceptual model of tourism destination competitiveness and attractiveness", in R. Kennedy (ed.) *Proceedings of the 2003 ANZMAC conference*. Adelaide, Australia: ANZMAC, pp. 637-647.
- Weaver, D.B. and Lawton, L.J. (2007) "Twenty years on: the state of contemporary ecotourism research", *Tourism Management*, Vol.28 No.5, pp.1168-1179. <https://doi.org/10.1016/j.tourman.2007.03.004>

Digital Marketing of Tourism Destinations: The Case of Lisbon

Elisa Castro-Neves¹, Beatriz Soares¹, Cláudia Mokdisse¹ and Cândida Silva²

¹ESHT, Polytechnic of Porto, Vila do Conde, Portugal

²CITUR, Algoritmi Center, ESHT, Polytechnic of Porto, Vila do Conde, Portugal

elisacastroneves@gmail.com

41220370@esht.ipp.pt

claudiamokdisse@gmail.com

candidasilva@esht.ipp.pt

Abstract: There is now a widespread recognition that the Web is the privileged place to search for and gather information in a wide variety of fields, as well as for consumers to share information about their experiences and interactions with brands, products and services. Moreover, it is increasingly important to realize that today digital communication is not completely controlled by the organization, there is a lot of content produced and shared by consumers, so their experience and involvement with the brand is crucial for the reputation and recognition of organizations on a global level. Tourism, particularly the management and promotion of tourist destinations, is no exception to this reality, so implementing an appropriate digital marketing strategy is essential for success in an increasingly global and competitive world, specially to create a strong digital brand. The aim of this work is to study the digital marketing strategies of the city of Lisbon. For that, it was analysed the social media networks Instagram and Facebook, and the official website, of Lisbon Regional Tourism Authority. Therefore, it was carried out a quantitative study to the social networks by analysing the official hashtags used through the platform Apify, and of the website using the framework proposed in the literature by Martinez-Sala et. al. In addition, it was conducted a qualitative study on 463 social media posts and to the website using the Access Monitor tool. The results shows that most of the posts using the hashtag #VisitLisbon are from Portuguese users and from companies, and that Instagram is much more used, which reveals that Portuguese companies are promoting the region, when promoting themselves, and for a younger audience. The website has a very attractive design and is coherent with social networks, but it has some weaknesses in terms of navigability and usability, as well as accessibility. In this sense, the digital marketing of the Lisbon region should be worked on so that tourists become its allies in promoting the destination.

Keywords: Digital marketing, Digital brand, Tourism destination, Lisbon, Portugal

1. Introduction

This paper analyzes the social networks Instagram and Facebook and the website of the Regional Tourism Authority of the Lisbon Region, called Visit Lisboa.

The importance of digital marketing strategies for organisations It is now widely recognised that the internet is the privileged place to search for and obtain information in the most varied fields, as well as for consumers to share information about their experiences and interactions with brands, products and services. Decision-making regarding the choice and purchase of products and services, as well as the realisation of that purchase, essentially involves digital channels.

The field of tourism, particularly the management and promotion of tourist destinations, is no stranger to this reality, so implementing an appropriate digital marketing strategy is essential for success in an increasingly global and competitive world.

In the tourism sector, digital marketing involves applying online tools and channels to bring tourist destinations closer to their public. Regional organisations are expected to use these resources for more comprehensive and efficient promotion.

One of the fundamental aspects of effective and successful communication and interaction is the need to understand consumers' wants and needs. Another essential point is to realise that nowadays communication is not completely controlled by the organisation; there is a lot of content produced and shared by consumers, so their experience and involvement with the brand is crucial for the reputation and recognition of organisations on a global level. The paper is structured as follows: first is made a literature review on the main topics of the study, the third section presents the methodology applied in the study, the next section the main results are discussed, and the last section presents the main conclusions and limitations of the study.

2. Literature Review

2.1 Digital Marketing in Destination Management

The web is now widely recognized as the privileged place to search for and obtain information in the most diverse areas, as well as for consumers to share their experiences and interactions with brands, products and services. According to Kaur (2017), digital marketing has now become an indispensable part of every business, regardless of its size and type. Tourism, in particular the management and promotion of tourist destinations, is no exception to this reality, with digital marketing being an essential element in the changes that have taken place in the way tourists interact with destinations (Magano & Cunha, 2020). Implementing appropriate digital marketing strategies is essential for success in an increasingly global and competitive world, especially for creating a strong digital brand. To implement successful digital marketing strategies, destination management should consider six crucial points – website quality, strong social media presence, search engine optimization (SEO), email-marketing, content and mobile responsivity (Kaur, 2017). Tourist destinations are complex combinations of tourism products and services that offer an integrated experience to consumers and are increasingly recognized as a concept that encompasses the tourist's own interpretation as a consumer (Buhalis, 2000), as well as their perception of the destination, which is formed from information and content based on searches carried out. The literature recognizes that all stages of the travel process, from inspiration to post-travel, are influenced by digital and mobile technologies (Cunha, 2019).

Organizations empowered by digital technologies can create value for themselves and their customers (Kannan & Li, 2017) and increase a deeper understanding of them, which improves the customer experience while fostering the development of lasting and long-term relationships (Kaur, 2017).

Digital marketing can be defined as an adaptive, technology-enabled process through which organizations collaborate with diverse stakeholders to create, communicate, deliver and sustain value for all stakeholders (Kannan & Li, 2017). Recognizing the importance of all stakeholders is a fundamental aspect, as digital communication is currently not entirely controlled by destination management organizations, and involves the participation of several stakeholders, including tourists. Digital marketing has transformed the traditional concept of marketing and the way in which all stakeholders, especially consumers, are viewed in this process, recognizing them as active co-creators (Baser, 2020). Consumers play an important role (Kannan & Li, 2017), with much of the digital content produced and shared by tourists themselves, so their experience and involvement with destinations as brands is crucial to their reputation and recognition on a global level.

2.2 Promoting Tourist Destinations Through Websites

In an increasingly digital world, the website has become the gateway to discovering new places for many travellers.

For tourist destinations, a well-designed website is the showcase that attracts, informs and inspires those who search them, transforming their computer screen into a window to paradise, presenting basic information about the location, but also, if well-crafted, a series of videos, photos and stories, creating an immersive experience for the viewer who connects with the culture and atmosphere of the place without even stepping a foot on the ground.

The Web, especially websites, have added new dimensions to the definition of communication, bringing with them different possibilities, perspectives and obstacles, transforming the means of interaction between organizations and the public (Augusto, 2014; Oliveira et al., 2023; Santos et al, 2020).

Kent et al. (2003) reinforces the idea that these transformations and almost minute-by-minute technology updates create new types of relationships, pointing out that websites have become very important for creating, adapting and modifying relationships between consumers and companies. The promotion of a destination thus goes beyond information. Stories, testimonials from locals and visitors, videos about the local culture, and even suggestions for personalized itineraries, create an emotional link between the traveller and the destination, awakening the desire to get to know the place up close.

A tourist destination's website needs to be a complete and inviting guide, and there are three different ways of perceiving them, according to Martínez-Sala et al. (2020), who created a quantitative evaluation framework to analyse websites: graphic design, usability and navigability. These categories are in line with the view that already Kent and Taylor (2003) defended, by stating that the main points that a website must consider capturing the public's attention are ease of use, the relevance of the information it contains, attractive design and interactivity.

In fact, the features of a website have a significant impact on public perception. A captivating, easy-to-navigate website that provides quality data and information and offers accessible interaction can increase the customer's willingness to buy (Stephanie et al., 2019).

Thus, promoting a destination through a website transcends the simple presentation of photos and information, becoming an immersive and interactive experience. As Grönroos (2016) points out, creating bonds and relationships with the customer is one of the key points that a company must pay attention to distinguish itself.

Promoting a destination through a website is a strategic investment that guarantees visibility, interaction and, above all, a connection with potential tourists. A well-designed website, adapted to any device, with engaging text, breathtaking photos, videos that convey the vibrant atmosphere of the place, detailed information on attractions, events, accommodation, transport, gastronomy and local culture, as well as interactive maps, booking portals and tour packages that make it easy to plan a trip, are a guarantee of success and constant viewing at any time and place.

2.3 Social Media Strategies and Destination Management

The development of a destination through tourism depends on much more than its natural and cultural resources. It requires the creation and coordination of a set of actions capable of transforming these resources into potential tourism products and experiences, promoting the destination's competitiveness. The planning and execution of these actions consists of the destination management process, conducted by Destination Management Organizations (DMO).

A DMO is a non-profit entity that represents a city or urban area in attracting and maintaining all types of travellers to that city or area, whether for business, leisure or both (Goeldner & Ritchie, 2011). DMOs play a central entrepreneurial and innovative role, providing destinations with the capacity to cope with changes and turbulence in the market.

Social media has emerged as a key tool in destination management, providing an interactive and dynamic platform that allows direct communication with tourists, both potential and actual.

Social media plays a crucial role in shaping a destination's image. Social platforms such as Instagram and Facebook allow destinations to share content that imprints the essence and authenticity of destinations, influencing consumers' travel decision-making process (Ketter & Avraham, 2012). In addition, the quality and ease of use of online information provide essential clues that influence tourists' behavioural intentions (Armutcu et al., 2023).

Literature highlight that the creation of attractive visual content is fundamental, because using high-quality photographs and videos tends to increase user engagement and shares, especially through social networks (Santos et al., 2023).

Online reputation management is also a vital strategy, in which social networks play an important role. Monitoring visitor comments and opinions on social media allows destination managers to respond quickly to problems and build a positive image. A good online reputation represents a significant advantage for any product or service provider (Cillo et al., 2021) and can be a source of benefits such as improving image, increasing consumer loyalty and ultimately increasing consumer retention capabilities.

Therefore, for this study was defined the following research question "How digital marketing strategies used by a DMO can improve its reputation online?". To answer the research question, it was defined two goals (1) identify, according to Martínez-Sala et al. (2020) framework, the design, usability and accessibility improvements that can be made to the "VisitLisboa" website to provide a better experience for Lisbon tourists; and (2) identify the social media reach through the hashtags defined by DMO of Lisbon.

3. Methodology

This exploratory study aims to analyse digital marketing strategies carried out by Lisbon Regional Tourism Authority, namely the website "VisitLisboa" which is one of the main digital marketing tools used to promote Lisbon as a tourism destination, and its social media networks, Instagram and Facebook.

The methodology for the website analysis includes a quantitative analysis based on the framework proposed by Martínez-Sala et al. (2020) to evaluate its usability, followed by a qualitative analysis using the Access Monitor tool to evaluate its accessibility. Through the Martínez-Sala et al. (2020) framework, it was considered

the following parameters: graphic design, navigability, and usability. Regarding the parameter usability it was considered the content; ergonomics; processes, errors and adaptation; interactivity; and distribution and marketing.

Additionally, it was analysed the publications on social media networks from October 2023 to April 2024. This data was collected using the platform Apify. All the content was transferred to an Excel file. We analysed information related to the date of publication, the kind of publication (text, photo, or video), the number of comments, the number of likes, the profile type of the user (individual or organizational).

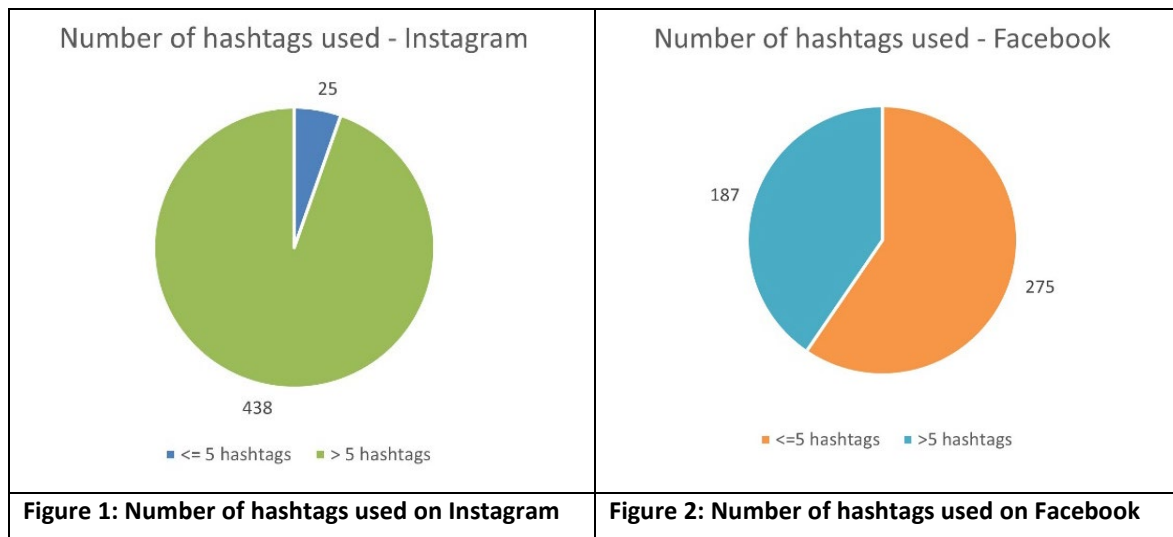
Regarding Instagram, our sample is composed of 463 results. In the Facebook platform, it was analysed 463 posts: 214 videos, 186 photos, 4 media attachments and 59 without specific information.

4. Results

4.1 Social Media Networks

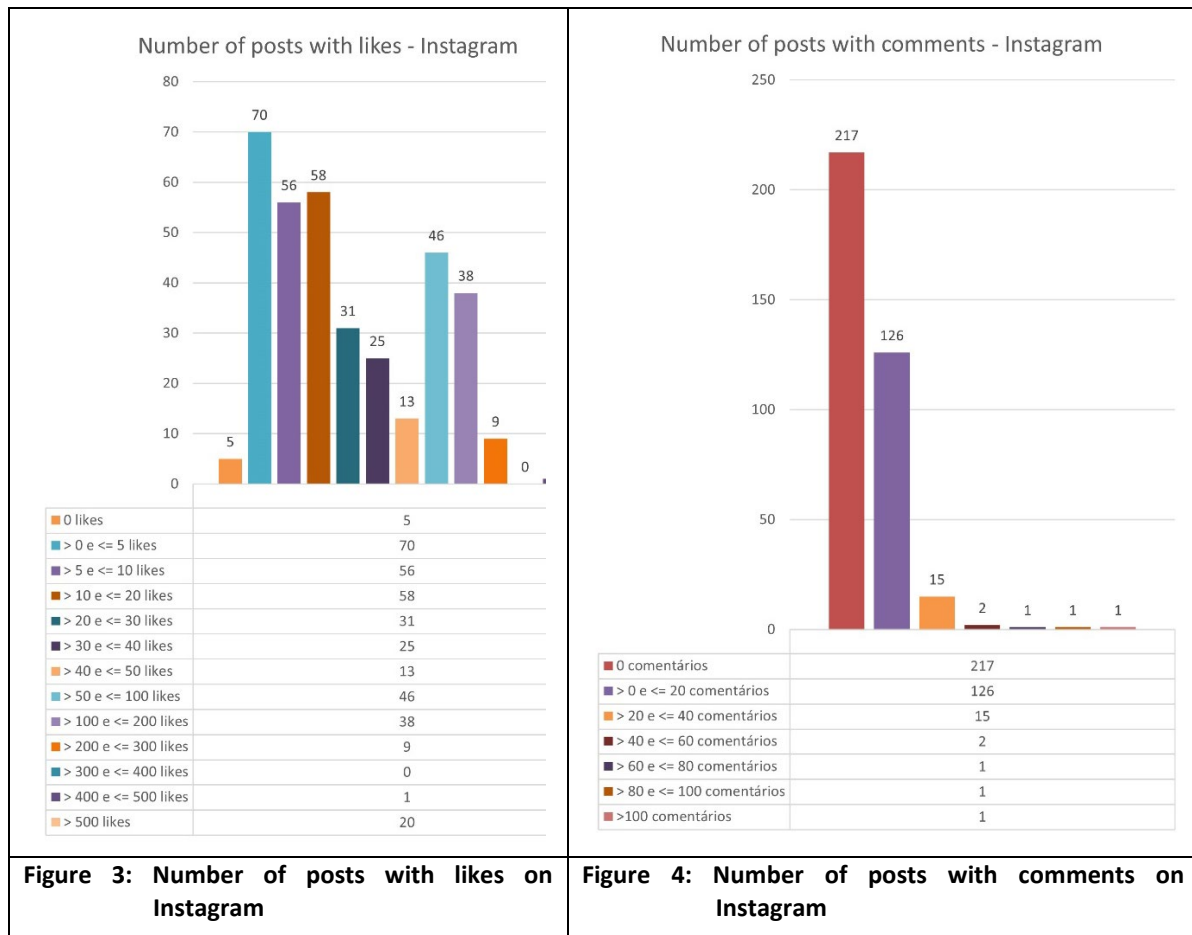
Regarding social media networks, the Instagram and Facebook were analysed to understand how these channels are used to communicate the destination, namely which hashtags are used and information related to the date and type of publication (text, photo or video), the number of comments and likes, and the type of user profile (individual or organizational). As the starting point was analysing the same number of posts, the last 463 at the time of the study, on both Instagram and Facebook, it was clear that Instagram is the most used social network. The 463 posts made on Instagram were made in 6 days (between 20 March 2024 and 26 March 2024), which represents around 77 posts per day. On Facebook, the 463 posts were made in 420 days (between 28 October 2023 and 2 April 2024), which is approximately 1 post per day.

The official hashtag defined by DMO is #VisitLisboa, and this is used in all the organization's posts on Instagram and Facebook, usually without recourse to others. About posts made by users, both individual profiles and organizations, numerous additional hashtags are used in addition to the official one. An excessive use of hashtags was even identified in many publications, especially on Instagram, considering the recommendations for use which indicate between 3 and 5 hashtags per publication. On Instagram, 25 posts with 5 or fewer hashtags and 438 posts with more than 5 hashtags were identified, as can be seen in the graph in Figure 1. Facebook identified 275 posts with 5 or fewer hashtags and 187 posts with more than 5 hashtags, as can be seen in the graph in Figure 2. Considering the relevance of Instagram as the social network with the most posts, the 8 most used hashtags were identified: #VisitLisboa, #lisboa, #portugal, #lisbon, #visitlisbon, #visitportugal, #lisbonlovers and #travel.

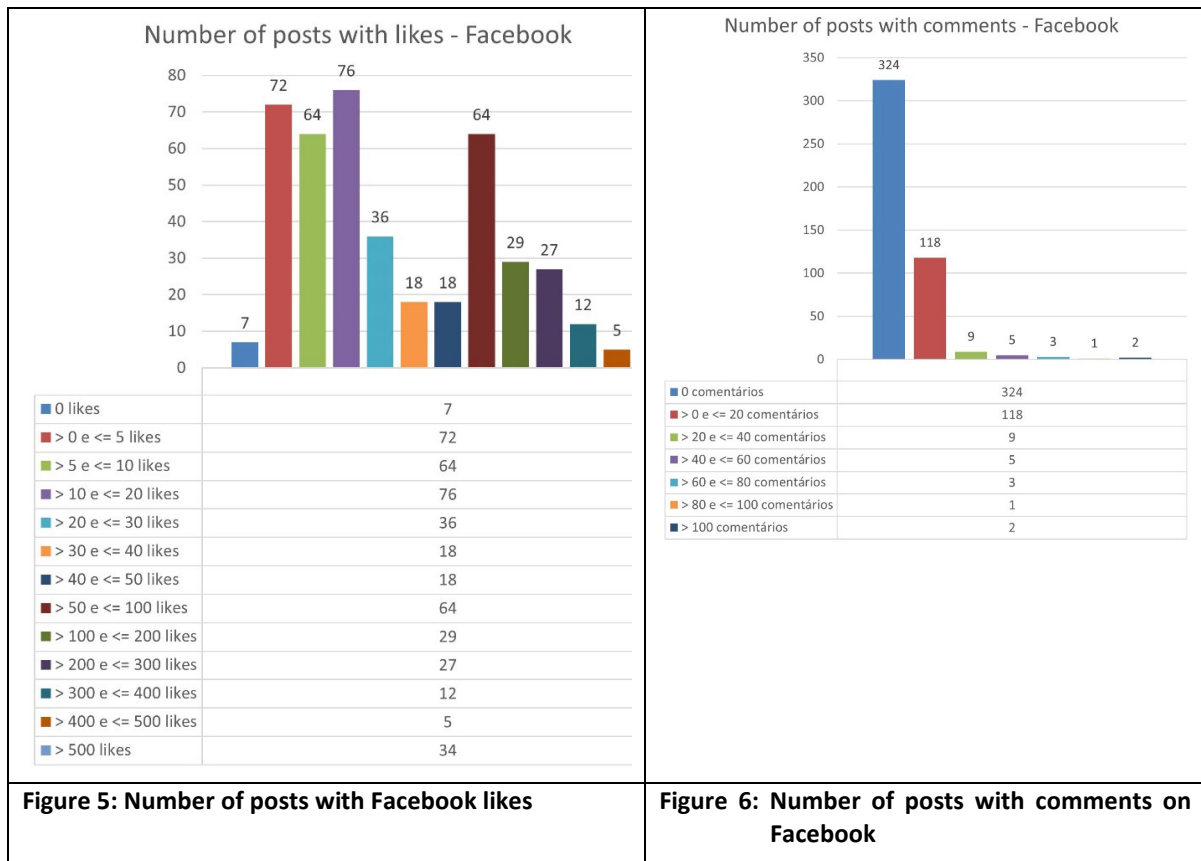


At the time of the study, the Instagram account had a total of 125,000 followers. The day with the most posts (98) was 21 March. Data on the number of posts with likes was analysed, as can be seen in the graph in Figure 3, with thirteen different intervals defined for this analysis. It was found that the post with the most likes (16,106) is a photo, originates from England and was made by an individual profile on 21 March 2024. Regarding the number of posts with comments, the data on this indicator was analysed, as can be seen in the graph in Figure 4, and seven different intervals were defined for this analysis. It was found that the post with the most comments (233) is a photo, originates from Belgium and was made by an individual profile on 22

March 2024. As for the type of posts, 292 photos and 171 'sidecars' were identified, this being a type of collection of multiple photos in a carousel. Regarding the type of user profile, there was a balance, with 234 individual users and 229 organizational users. As for the origin of the users, 32 different countries of origin were identified, with a higher prevalence of publications originating in Portugal, 191, followed by 58 originating in France and 56 originating in England.



The Facebook page had a total of 771,000 followers. The month with the most posts (295) was March 2024. Posts with likes was analysed (Figure 5), in a range of thirteen different intervals. It was found that the post with the most likes (7074) is a photo, originates from Portugal and was made by an organizational profile on 24 March 2024. The number of posts with comments analyses (Figure 6) shows that most of them don't have comments. Nevertheless, the post with most comments (150) is the same one that had most likes. As for the type of publications, 214 videos, 186 photos, 4 media attachments and 59 with no specific information were identified. Regarding the type of user profile, there was a balance, with 234 individual users, 221 organizational users and 7 publications with no information to identify the profile. As for the origin of the users, 17 different countries of origin were identified, with a higher prevalence of publications originating in Portugal, 329, followed by 32 from Brazil and 17 from Spain.



4.2 Website

To complement the analysis of this enigmatic city's social networks, we analysed its website, an essential assessment since it acts as the city's main digital showcase, concentrating detailed information on the products, services, values and identity of the *VisitLisboa* brand.

Two different analyses were carried out on the DMO website: one quantitative, focusing on the Martínez-Sala et al. (2020) framework and other qualitative, analysed according to the Access Monitor tool.

Martínez-Sala et al. (2020) framework analyses three different parameters based on three scales classified as 0-1, 0-2 and 0-3, where 0-1 is used for characteristics that are present (1) or not (0) and where 0 to 2 or 0 to 3 classifies different details from bad (0) to excellent (3).

In the graphic design parameter, the site scores highly in all indicators, with a parameter score of 2 (Table 1). The website then uses bright colors, both in the logo and on the page itself, achieving an appealing brand image. However, since it is such a lively and diverse city, with a wide range of information on activities, tickets, news and so on, it ends up having too much information on a single page, making it difficult to read. Since the eye can only focus on one stimulus at a time, the score for this parameter was not maximum due to problems with clarity and legibility that don't form a cohesive visual narrative and don't guarantee pleasant read.

Table 1: Score obtained per indicator in the parameter Graphic Design

Indicator	Score
Brand image	2
Discursive, argumentative and rhetorical Analysis	2
Clarity	2
Legibility	2
Total Score	2

In the navigability parameter, the site obtained an average score of 1.81 (Table 2), slightly lower than maximum score of 2.27. This result stems from navigation problems, flaws in the presence of indicators, fonts and dates, the lack of remote navigation, as well as the fact that the tags defined don't cover the entire site and the search engine results aren't very precise. However, there are small details with a maximum rating, such as the presence of well-divided and subdivided main navigation, giving users the perfect possibility of finding what they are looking for using basic buttons.

Table 2: Score obtained per indicator in the parameter Navigability

Indicator	Score
Main navigation	3
Expressiveness	1
Identification	1
Structural navigation	3
Orientation	3
Hierarchy	3
Local navigation	1
Remote navigation	0
Semantic or hypertext navigation	1
Tags	1
Search engine	3
Total Score	1,81

About usability, the overall score is 2, out of a maximum of 2.5 (Table 3). This score is justified by : content, as already mentioned, the site presents a variety of very detailed and up-to-date content; in distribution and marketing, the site provides links to other sites that allow the user to book tourist products and services, such as accommodation, transport, catering and complementary nature, sports, cultural and leisure activities, ticket offices, making it interactive; as well as having links to the brand's different social networks and online shopping and booking, location map and news section. However, it also has flaws, which focus on details such as the lack of a personalised newsletter according to the user's preferences, consequences for errors that may occur on the site and adaptation to the previously defined preferences of each user.

Table 3: Score obtained per indicator in the parameter Usability

Indicator	Score
Content	
Consistency between theme, audience and objectives	1
Interest and opportunity	3
Quantity	3
Accuracy	2
Editing	2
Relevance	2
Ergonomics	
Easy	3
Flexibility	2
Multimedia resources	3
Speed	3
Processes	
Presentation of status	2
Conventions	3
Errors	

Indicator	Score
Error correction (possibility of going back)	1
Notifications	1
Consequences	0
Adaptation	
Adaptation	0
Frequent access	3
Terms and Policies	3
Interactivity	
Contact information	3
Personalized access	1
Personalized newsletter	0
Specific tourism/hotel applications	3
Specific web 2.0 applications	1
Blogs and social networks	3
Distribution and marketing	
Online shopping and booking tools	1
Flexibility	3
Security	2
Total Score	2

The overall score of the website is 1.94, with a maximum UI/UX score of 2.44, showing that it has a good graphic design, organised navigability and very well-thought-out details. Nothing is missing for those looking for the city, with high quality informative content providing an engaging and satisfying experience for visitors, thus guaranteeing a positive user experience, only needing to improve parameters of clarity, legibility, navigability, adaptation and interactivity.

About the qualitative analysis of the website, the Access Monitor tool analyses and evaluates the accessibility and usability and gives a summary of the overall score of the *VisitLisboa* website of 7.2 out of 10, where 35 web accessibility practices were analysed, with 23 practices considered acceptable, 7 unacceptable and 5 requiring manual analysis.

The unacceptable errors concern the lack of text on images, hierarchical violation at header level and buttons without accessible names. In the links, 18 were identified with empty content and another 27 without accessible names, jeopardising navigation and the clarity of the content, which can result in a confusing and frustrating browsing experience. Regarding colour contrast, 13 colour combinations with less than the minimum permitted contrast and less than the optimised proportion were found, making reading difficult for users with visual impairments or vision difficulties, and it is important to ensure that all colour combinations meet the recommended contrast standards for good readability.

The 5 practices that need to be analysed manually are related to recommendations as best practices and not mandatory rules. These included 175 images with an empty *alt*, 47 *headers* on the same page and 4 cases of colour combinations with lower contrast than expected.

Finally, acceptable practices were found that allow the website to stand out with a high ranking. Structured navigation, such as the possibility of going directly to the main content, correct titles, accessible headings, well-structured forms with working buttons and error-free HTML, are essential for improving the user experience. In addition, the correct use of titles and attributes is important for the structure and navigation of the website.

5. Discussion and Conclusion

This research project aimed to study the digital marketing strategies of the city of Lisbon, analysing the social networks Instagram and Facebook, and the official website of the Lisbon Regional Tourism Authority. Knowing

that digital marketing is now an essential part of any business (Kaur, 2017) and that tourism, in particular the management and promotion of tourist destinations, is no exception to this reality, it was possible to identify that a cohesive and appropriate online presence plays a fundamental role in attracting and engaging the organisation with its target audience. Our results indicate that, despite the work already done by the Lisbon DMO, namely through its website, its social networks and the definition of official hashtags, the digital marketing strategy can, and should, be improved, presenting more consistency and thus achieving a greater reach.

Digital marketing is an essential element in the changes that have taken place in the way tourists interact with destinations (Magano & Cunha, 2020). In this study, it was possible to see that on the social media networks analyzed, many of the posts with the organisation's official hashtag #VisitLisbon are made by individual profiles and organisations, most of them based in Portugal, which thus become active participants in the communication, dissemination and promotion of the city of Lisbon, while providing valuable data that can then be processed and used to improve the destination's own digital marketing strategies. The fact that there are many profile posts from Portuguese organisations shows that these companies are promoting the region while promoting themselves. It was also possible to see that Instagram is the social network that users most use, being clearly more used than Facebook, which is in line with the literature, which identifies an increase in the use of Instagram, along with a decrease in Facebook, particularly in the younger age groups.

Unlike social networks, websites offer an institutionalised and controlled space where companies have more freedom to organise and present their content in a strategic way. Therefore, two different analyses were carried out on the website of Lisbon DMO: one Quantitative and the other Qualitative; the first focusing on the Martínez-Sala et al. (2020) framework and the second analysed according to the Access Monitor tool.

In the quantitative analysis, in the graphic design parameter, the site scores highly in all indicators, with the parameter score equal to 2. In the navigability parameter, the site obtained an average score of 1.81, slightly lower than the parameter's maximum score of 2.27. This result stems from navigation problems, flaws in the presence of indicators, fonts and dates, remote navigation not existing, as well as the tags defined not covering the entire site and search engine results not being very precise. Regarding usability, the overall score is 2, out of a maximum of 2.5. The website's overall score is 1.94, out of a maximum score for UI/UX of 2.44, showing that it has a good graphic design, organised navigability and very well-thought-out details so that nothing is missing for those looking for the city.

Regarding the qualitative analysis, the overall score of the website is 7.2 out of 10, where 35 web accessibility practices were analysed, with 23 practices considered acceptable, 7 unacceptable and 5 requiring manual analysis.

Thus, we conclude that digital marketing is currently essential in the management and promotion of tourist destinations, requiring continuous investment in a carefully planned and implemented strategy that considers the various digital channels available and identified as important for the destination. Data collection and constant monitoring are also essential for improving results and adapting to market trends and changes in consumer behaviour and preferences.

Our country's regional tourism organisations, particularly those in the Lisbon region, must work actively to have an increasingly relevant online presence in relation to the objectives defined in the national tourism strategy, thus positioning Portugal competitively in an increasingly competitive global market.

6. Limitations and Future Work

Although this study has provided valuable insights into Lisbon's digital marketing as a tourist destination, several limitations must be recognised. Mainly, the fact that Lisbon DMO itself has such an under-utilised official website and doesn't even have associated social networks. Not all tourists may have reached the Visit Lisboa website, and this limitation may have influenced the results and interpretation of the data. To overcome these limitations, future studies should consider improving the official website of Lisbon DMO, as well as its presence on the social networks. In addition, a more interactive website that allows sharing and posting could provide a more comprehensive understanding of the phenomenon in question. With these approaches, researchers will be able to validate and expand the knowledge acquired, thus contributing to the advancement of the field.

References

- Armutcu, B., Tan, A., Amponsah, M., Parida, S., & Ramkissoon, H. (2023). Tourist behaviour: The role of digital marketing and social media. *Acta Psychologica*, 240, 104025. <https://doi.org/10.1016/j.actpsy.2023.104025>
- Augusto, L. (2014). Comunicação e turismo: Relações públicas, dialogismo e imagem nos media digitais. <https://estudogeral.sib.uc.pt/handle/10316/26792>
- Baser, G., (2020). Digital Marketing practices: Trends and challenges for the tourism industry. *International Journal of Global Tourism Research*, 4 (1), 1-12.
- Buhalis, D. (2000). Marketing the competitive destination of the future. *Tourism Management*, 21(1), 97-116.
- Cillo, V., Rialti, R., Del Giudice, M., & Usai, A. (2021). Niche tourism destinations' online reputation management and competitiveness in big data era: Evidence from three Italian cases. *Current Issues in Tourism*, 24(2), 177–191. <https://doi.org/10.1080/13683500.2019.1608918>
- Cunha, M. N. (2019). The tourism journey, from inspiration to post-travel phase, and the mobile technologies, *African Journal of Hospitality, Tourism and Leisure*, 8(5).
- Goeldner, C. R., & Ritchie, J. R. B. (2011). *Tourism: Principles, Practices, Philosophies*. John Wiley & Sons.
- Grönroos, C. (2016). *Service Management and Marketing: Managing the Service Profit Logic*. John Wiley & Sons, Inc.
- Kannan, P. K. & Li, H. A. (2017). Digital marketing: A framework, review and research agenda. *International Journal of Research in Marketing*, 34(1), 22-45.
- Kaur, G. (2017). The importance of digital marketing in the tourism industry. *International Journal of Research-Granthaalayah*, 5(6), 72. <https://doi.org/10.5281/zenodo.815854>.
- Kent, M., & Taylor, M. (2003). Maximizing media relations: A Web site checklist [Review of Maximizing media relations: A web site checklist]. *Public Relations Quarterly*, 14-18. https://www.academia.edu/2845555/Maximizing_media_relations_A_Web_site_checkli_st
- Kent, M. L., Taylor, M., & White, W. J. (2003). The relationship between Web site design and organizational responsiveness to stakeholders. *Public Relations Review*, 29(1), 63– 77. [https://doi.org/10.1016/s0363-8111\(02\)00194-7](https://doi.org/10.1016/s0363-8111(02)00194-7)
- Ketter, E., & Avraham, E. (2012). The social revolution of place marketing: The growing power of users in social media campaigns. *Place Branding and Public Diplomacy*, 8. <https://doi.org/10.1057/pb.2012.20>
- Magano, J. & Cunha, M. N. (2020). Digital marketing impact on tourism in Portugal: A quantitative study. *African Journal of Hospitality, Tourism and Leisure*, 9 (1), 1-19.
- Martínez-Sala, A.M., Monserrat-Gauchí, J., & Alemany-Martínez, D. (2020). User Usable Experience: A three-dimensional approach on usability in tourism websites and a model for its evaluation. *Tourism Management Perspectives*, 33, 100579
- Oliveira, A. J. de, Pereira, A. M., Augusto, L. P., Santo, P. M., & Santos, S. C. (2023). A influência das motivações dos turistas na visita a diferentes destinos: evidências para a comunicação dos destinos. *Revista Turismo & Desenvolvimento*, 40, 47-56. <https://doi.org/10.34624/rtd.v40i0.31420>
- Santos, F. dos, Lunardi, G. L., Maia, C. R., & Añaña, E. da S. (2020). Fatores que influenciam a participação dos consumidores no Turismo Eletrônico. *Revista Brasileira de Pesquisa Em Turismo*, 14(2), 139–155. <https://doi.org/10.7784/rbtur.v14i2.1831>
- Santos, S., Vasconcelos, Maria, & Ferreira, S. (2023). Tourists' Engagement on Tourism Organizations' Facebook Pages: The Role of User-Generated Content. *International Conference on Tourism Research*, 6(1), 283–291. <https://doi.org/10.34190/ictr.6.1.1164>
- Stephanie, A., Hidayatullah, S., & Ardianto, Y. T. (2019). An Emperical Study of Website Quality on Hotel Booking Online [Review of An Emperical Study of Website Quality on Hotel Booking Online]. *International Journal of Business Marketing and Management*, 4(2), 10–14. https://www.researchgate.net/publication/339777604_An_Emperical_Study_of_Websit_e_Quality_on_Hotel_Booking_Online

Influence of Food Bloggers in Promoting Sustainable Gastronomic Tourism Empowering Rural Economies

Ma. Flora Collado

West Visayas State University, Iloilo City, Philippines

mcollado@wvsu.edu.ph

Abstract: This study investigates the influence of food bloggers in promoting gastronomic tourism as a tool for empowering rural economies, specifically focusing on the rural towns of Iloilo Province, Philippines. Social Influence Theory was the foundation, the study employs a qualitative approach to explore how food bloggers shape tourist behavior, foster economic growth, and enhance the visibility of local businesses. Data were gathered through focus group interviews with 25 purposively selected samples from stakeholders, including rural business owners, tourism officials, food bloggers and residents. The findings reveal that food bloggers significantly enhance rural tourism by portraying authentic culinary experiences and validating the appeal of lesser-known destinations. Through visually appealing content, personal narratives, and direct endorsements, bloggers create a sense of credibility and trustworthiness, heightening tourist curiosity and engagement with rural destinations. This increased interest translates into tangible economic benefits for the communities, as evidenced by higher customer inflow, increased revenue for local businesses, and the creation of new job opportunities. The economic boost supports the sustainability of rural areas, providing a vital source of income for businesses that rely on tourism and fostering entrepreneurial activities among community members. However, it also identifies critical challenges associated with food blogger-driven tourism. These include a growing dependency on influencers for visitor traffic, risks of over-tourism that strain local resources, and pressures to adapt or commercialize cultural practices to meet tourist expectations, potentially compromising cultural authenticity. In response, the study offers practical recommendations for rural tourism boards, local businesses, and food bloggers to develop collaborative, sustainable strategies that promote long-term tourism growth while respecting local culture and resources. Finally, the study calls for further research to examine the long-term economic impacts of digital influence on rural tourism and encourages comparative studies across different cultural regions to understand varying dynamics and strategies for leveraging digital influence in rural economic development.

Keywords: Food bloggers, Gastronomic tourism, Rural economies, Social influence theory, Iloilo Philippines

1. Introduction

Gastronomic tourism has been attracting travellers seeking authentic cultural experiences through food (Everett, 2019). This tourism niche provides rural communities with valuable opportunities to attract visitors. It also stimulates economic growth by showcasing local cuisine (Long, 2020). The rise of social media makes food bloggers influential figures. They are sharing vibrant visuals, personal stories, and real-time culinary experiences across platforms. Some of the most popular ones include Instagram, Facebook, and blogs. These platforms often spotlight lesser-known rural destinations (Kim & Tussyadiah, 2021; Munar & Jacobsen, 2021). Recently, some rural towns of Iloilo Province like Miagao, Guimbal, Lambunao, and San Joaquin are popular among food bloggers. Their digital endorsements enhance visibility and attract both domestic and international tourists. These created a phenomenon that is vital in contributing to economic sustainability and resilience and is increasing support for local businesses (Hays et al., 2021). As research on gastronomic tourism exists, however, studies specifically addressing the role of food bloggers in rural economic development are limited (Miguéns et al., 2018). Much of the literature focuses on influencers in urban areas. Food bloggers are neglected, especially their potential to empower rural economies. Their unique and culturally resonant content is often undervalued (Elena, 2020; Fernandes & Castro, 2023). This study addresses the gap by a) examining the economic impact of food bloggers on rural communities and b) exploring how digital influence can promote sustainable rural development areas.

2. Research Questions

This qualitative study explores the influence of food bloggers in promoting gastronomic tourism and empowering rural economies in the rural towns of Iloilo Province, Philippines. This study addresses two research questions:

- How do food bloggers influence tourist interest in rural gastronomic destinations?
- How do local businesses and stakeholders perceive the impact of food bloggers on rural economies?

3. Theoretical Framework

This study is informed by Social Influence Theory. Kelman (1958) initially developed it, which provides a foundation for understanding how individuals' attitudes and behaviours are shaped by influential figures. These figures include digital spaces wherein social media influencers play a critical role (Kim & Tussyadiah, 2021; Fernandes & Castro, 2023). In the realm of gastronomic tourism, food bloggers act as powerful agents of influence. Their perceived expertise, social proof, and authenticity collectively shape consumer interest in rural culinary destinations. Food bloggers leverage their expertise and credibility in food and travel. They inspire followers to explore lesser-known gastronomic destinations like rural areas that are often overlooked in mainstream tourism (Lim et al., 2017). These influencers use social media to provide visual and narrative portrayals of authentic culinary experiences. Their contents are appealing to followers' desire for unique cultural encounters and creating a bandwagon effect. Audiences become motivated, and they tend to emulate the influencer's travel choices (Aral & Walker, 2012). Bloggers are authentically engaging with local cuisine and culture. They foster a sense of social proof, which makes followers internalize the depicted experiences as desirable and meaningful (Munar & Jacobsen, 2021). This approach enhances the appeal of rural gastronomic destinations. However, this approach positions food bloggers as essential promoters of tourism-driven economic development for rural communities (Fernandes & Castro, 2023).

4. Literature Review

Gastronomic tourism is defined as travel motivated by a desire to explore and experience unique culinary offerings. It has emerged as a significant niche within the tourism industry, which is driven by traveller's growing interest in authentic local food experiences (Everett, 2019; Long, 2020). This form of tourism allows visitors to engage with local culture through cuisine. The food is positioned as a central element of cultural immersion and discovery. Gastronomic tourism is particularly valuable for rural development. It provides smaller communities with opportunities to attract visitors, generate income, and enhance local businesses. Gastronomic tourism draws tourists to less-populated areas. This contributes to local economic growth through increased spending on food, accommodation, and cultural activities. It plays a role in cultural preservation. It encourages communities to maintain and celebrate their traditional culinary practices. Most importantly, it enhances community pride and social cohesion (Hjalager & Richards, 2021). In this way, gastronomic tourism supports sustainable development in rural areas, which makes it a promising avenue for empowering communities economically and culturally.

5. The Role of Social Media and Digital Influencers in Tourism

The advent of social media has significantly impacted tourism promotion, with digital influencers, particularly food bloggers, emerging as key figures in shaping travel trends and consumer behaviour (Kim & Tussyadiah, 2021). Food bloggers have carved out a unique space within this digital landscape, leveraging their online presence, personal stories, and visually appealing content to attract audiences to specific destinations. Their posts often focus on authenticity, cultural immersion, and the discovery of hidden culinary gems, which resonate with audiences looking for meaningful and unique travel experiences (Fernandes & Castro, 2023). Social media platforms like Instagram, Facebook, and personal blogs amplify the reach of these influencers by allowing them to target and engage broad, yet specific, audiences. Each platform has distinct features that enhance engagement: Instagram's visual storytelling capabilities allow bloggers to showcase destinations through captivating images and videos, Facebook supports community-building by facilitating discussions and group interactions, and blogging platforms enable influencers to share detailed, personal narratives that provide in-depth insights into their culinary journeys (Munar & Jacobsen, 2021). Through these digital channels, food bloggers play a pivotal role in driving interest in various travel destinations, making them influential players in modern tourism marketing.

Social Influence Theory, initially developed by Kelman (1958), offers a framework for understanding how influencers, such as food bloggers, shape consumer behaviour through mechanisms like compliance, identification, and internalization. Compliance refers to individuals acting in alignment with influencers due to a perceived reward or social approval; identification occurs when individuals adopt behaviours because they admire and want to emulate the influencer; and internalization involves adopting beliefs or behaviours because they align with personal values. Food bloggers leverage these mechanisms by building expertise, credibility, and authenticity, which encourages followers to trust their recommendations and perceive them as "social proof" of desirable experiences (Aral & Walker, 2012; Lim et al., 2017). This social proof is particularly effective in driving tourism to rural culinary destinations, as followers are motivated to explore these places

based on the bloggers' endorsements. However, theoretical gaps remain in the application of Social Influence Theory to the specific context of food bloggers promoting rural gastronomic tourism, especially in understanding how these mechanisms translate to sustained economic impact. This study aims to fill these gaps by applying Social Influence Theory to the relatively unexplored field of rural tourism promotion through food blogging, thus contributing to a deeper understanding of digital influence in rural economic development.

6. Economic Impact of Food Bloggers on Rural Destinations

Food bloggers play a substantial role in promoting tourism in rural areas by driving interest in unique culinary offerings and less-visited destinations, which can translate into tangible economic benefits for local communities. Studies show that food bloggers can help generate income for local businesses, create job opportunities, and foster a sense of community pride by showcasing the authenticity and cultural richness of rural cuisine (Hays et al., 2021). Case studies illustrate this impact; for instance, in regions such as Iloilo Province, food bloggers' coverage of traditional dishes and local culinary events has notably boosted tourism, enhancing local economies and attracting visitors who may otherwise overlook these destinations (Elena, 2020). However, there are challenges and limitations to this reliance on food bloggers for rural tourism development. Dependency on influencers can lead to volatile tourism flows, with visitor numbers fluctuating based on influencer activity. There is a risk of overtourism, which can strain local resources and infrastructure. As destinations gain popularity, maintaining cultural authenticity also becomes challenging, as increased visitor demand may pressure communities to adapt or commercialize their traditional practices to meet tourist expectations (Miguéns et al., 2018).

Existing literature on the role of influencers in tourism predominantly centers on urban and high-traffic tourist destinations, leaving a significant gap in understanding their impact on rural economies (Miguéns et al., 2018). While studies have documented general effects of influencers on visitor numbers and consumer behaviour, there is limited research on the specific economic contributions of food bloggers to rural tourism, particularly regarding how these translate to sustained economic empowerment for local communities (Fernandes & Castro, 2023). Furthermore, there is a pressing need for region-specific studies in underrepresented areas like the Philippines and Southeast Asia, where food blogging's influence on rural tourism may carry unique cultural and economic implications. Such studies could provide valuable insights into the distinct dynamics of digital influence in rural settings, contributing to more nuanced and effective strategies for leveraging food bloggers in sustainable rural development.

7. Methodology

This study employed a qualitative approach to explore the influence of food bloggers in promoting gastronomic tourism. Interviews were made to capture diverse perspectives from stakeholders involved as a mechanism for empowering rural economies, with a focus on the rural towns of Iloilo Province. A qualitative study focuses on how individuals perceive and give meaning to different social behaviours in order to explore people's social observations (Tümen-Akyıldız and Ahmed, 2021). This approach will help researchers examine opinions, attitudes, and perspectives into the impact of food bloggers on the dynamics of rural tourism in Iloilo Province.

Data collection involved conducting focus group interviews designed to encourage participants to discuss and reflect on the impact of food bloggers in attracting visitors to rural areas, generating income, and promoting local culture. Focus group discussion is to produce the greatest number of arguments and perspectives within a limited duration. This method might be used as the researcher wants to explain a problem or issue at a deeper understanding than a questionnaire method (Prasad & Garcia, 2017). To capture focus group discussion, gather participants with common experiences together to examine a particular subject of interest, and it is known as an effective way to gather knowledge from all kinds of people (Lune & Berg, 2017).

A total of 25 participants from the province's five districts were selected through a combination of purposive and convenience sampling. Participants were chosen based on their knowledge, experience and involvement in promoting sustainable gastronomic tourism. Purposive sampling targeted specific stakeholders, including twelve rural business owners, five tourism officials, and three food bloggers, whose roles are directly relevant to understanding the influence of food blogging on rural tourism. Convenience sampling supplemented this by including five rural residents involved in tourism who were readily available and willing to share their insights. Focus group interviews were conducted as part of the data gathering process in order to get participants notion of how food bloggers impacted in attracting visitors to rural areas, generating income, and promoting local culture.

Thematic analysis is a very common method for examining qualitative data, which often consists of detailed descriptive data. Thematic analysis models are valuable across multiple disciplines (Naeem et al., 2023). Data were then analyzed using thematic analysis in NVivo, allowing the identification of patterns and recurring themes in participant responses, such as economic benefits, cultural pride, and challenges in influencer-driven tourism. This approach provided rich qualitative insights into the role of food bloggers in shaping rural tourism dynamics in Iloilo Province.

8. Findings

This section presents the detailed findings aligned with the objectives of the study. The influence of food bloggers in promoting gastronomic tourism in empowering rural economies in the rural towns of Iloilo Province, Philippines.

The NVivo presentation in the influence of food bloggers in boosting gastronomic tourism rural economies in Iloilo Province. The NVivo-style bar chart shows the coding hierarchy of main themes and sub-themes in the food blogger tourism study. Each bar represents a sub-theme, with its length indicating the frequency or emphasis. This layout visually conveys the weight of each theme shown in Figure 1.

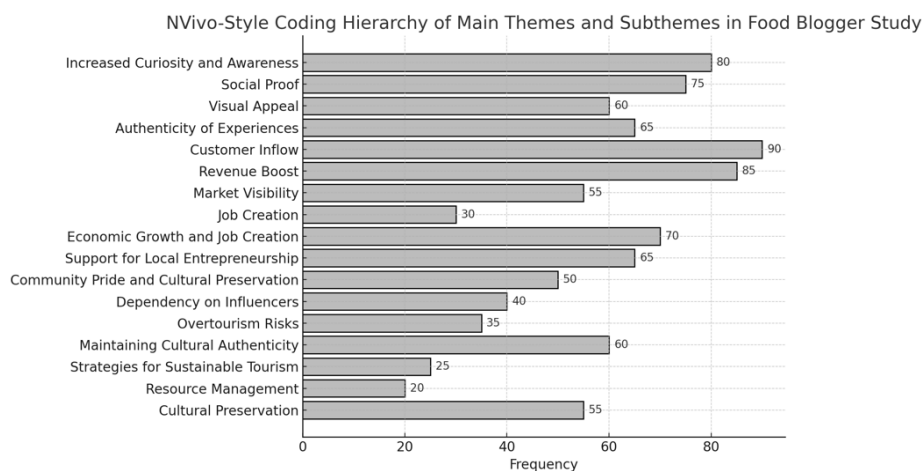


Figure 1: Coding Hierarchy of themes and subthemes

Table 1: Influence on tourist behaviour

Aspect of Influence	Description	Direct Quotes from Participants
Increased Visibility and Tourist Curiosity	Food bloggers' content has raised awareness of rural destinations in Iloilo, attracting local and international tourists. Tourism officials and rural residents observed a notable increase in visitor interest and engagement with local culinary and cultural offerings.	"Since [the bloggers] started posting about our town, we've seen more visitors, even from outside the country." — Tourism Official
		"People now come specifically to try the dishes they see online. It's bringing new faces to our small restaurants." — Local Business Owner
Social Proof and Decision-Making	Participants indicated that food bloggers' endorsements serve as "social proof," legitimizing these rural destinations as worthwhile travel experiences. Visual content, such as food reviews and personal stories, was particularly influential in inspiring tourists' travel decisions.	"When tourists see food bloggers enjoying our food, it makes them want to come and try it themselves." — Tourism Official
		"The photos and stories they share make our place feel like a must-visit spot for anyone interested in local food." — Rural Resident
Types of Content That Drive Interest	Participants noted that specific content, including in-depth food reviews, visual storytelling (photos and videos), and bloggers' personal narratives, effectively captured the appeal of Iloilo's culinary culture and inspired potential tourists.	"People love the way [bloggers] show the food—it's like they're experiencing it with them through the pictures." — Business Owner

The findings on how food bloggers influence tourist interest in rural destinations in Iloilo Province detail aspects such as increased visibility, social proof, and the types of content that effectively inspire travel decisions. Direct quotes from participants illustrate the impact of bloggers' endorsements on attracting both local and international visitors, which is reflected in Table 1.

Table 2: Economic impact on rural businesses:

Economic Impact	Description	Direct Quotes from Participants
Increased Customer Inflow	Local businesses observed a rise in customer visits after being featured by food bloggers, with more tourists seeking out specific dining experiences.	"Since we were featured, we've had a steady stream of new customers, especially on weekends." — Local Restaurant Owner
		"Many tourists come in asking about the dishes they saw on (the blogger's page), so we see more people now." — Cafe Owner
Boost in Revenue	Business owners reported increased revenue due to the higher customer inflow, noting that visitors influenced by bloggers are willing to spend on local cuisine and products.	"Our sales have improved since tourists now recognize us from social media." — Market Vendor
		"We saw a noticeable increase in earnings because people are curious to try what they saw online." — Small Business Owner
Enhanced Market Visibility	Food bloggers' coverage has boosted the visibility of rural businesses, establishing them as recognized spots for regional cuisine and authentic dining experiences.	"We've gained a following just from being mentioned by [the blogger], and people now associate us with the best local food." — Restaurant Owner
		"The exposure online makes our business more known, even to people from other provinces." — Store Owner

The perceived economic impact of food bloggers on rural businesses in Iloilo Province, focusing on increased customer inflow, boosted revenue, and enhanced market visibility. Direct quotes from local business owners illustrate how online exposure have contributed to business growth and recognition, as outlined in Table 2.

Table 3: Empowerment through tourism growth

Empowerment Aspect	Description	Direct Quotes from Participants
Economic Growth and Job Creation	Increased tourism has led to job opportunities in the community, from restaurant staff to tour guides, boosting local employment.	"With more tourists, we've been able to hire additional staff to manage the demand." — Restaurant Owner
		"Young people in our community now have work opportunities here instead of needing to leave for the city." — Tourism Official
Support for Local Entrepreneurship	The rise in tourist visits has encouraged locals to start their own businesses, such as souvenir shops and food stalls, fostering entrepreneurship.	"Many people have started small businesses, seeing the chance to cater to the influx of tourists." — Local Resident
		"I opened a small shop because I knew visitors wanted to take home something unique from our area." — Shop Owner
Increased Community Pride and Cultural Preservation	Tourism driven by food bloggers has fostered a sense of pride in local culture, as residents see appreciation for their culinary heritage.	"We feel proud to share our food and traditions with people from outside; it gives us a reason to preserve them." — Community Elder
		"Seeing tourists enjoy our traditional dishes makes us want to continue our culinary practices." — Local Business Owner
Enhanced Local Infrastructure	The demand from tourists has led to improvements in infrastructure, including better roads, signage, and public facilities, benefiting both locals and visitors.	"The increase in visitors encouraged our community to improve the facilities and roads." — Community Leader
		"Better infrastructure helps not only the tourists but makes life easier for us residents too." — Rural Resident

The ways in which tourism growth, driven by food bloggers, has empowered rural communities in Iloilo Province. Key areas of impact include economic growth, job creation, support for local entrepreneurship, enhanced community pride, and improvements in local infrastructure, with direct quotes from community members highlighting these benefits illustrated in Table 3.

Table 4: Challenges and Limitations

Challenge/ Limitation	Description	Direct Quotes from Participants
Dependency on Digital Influencers	Communities expressed concern over dependency on food bloggers for consistent tourist inflow, as visits can fluctuate with influencers' activity levels.	"If the bloggers stop posting about us, there's a chance the tourists may not come back as often." — Tourism Official
		"Our visibility depends a lot on influencers, and it feels uncertain without a consistent promotion plan." — Local Business Owner
Risk of Overtourism	Increased interest driven by bloggers can lead to overtourism, putting strain on local resources and infrastructure in smaller communities.	"The sudden influx is good for business, but we worry about our resources being stretched too thin." — Community Leader
		"Too many visitors at once can impact the environment and our daily lives, especially in peak seasons." — Rural Resident
Maintaining Cultural Authenticity	Some participants noted challenges in preserving cultural authenticity, as high tourist demand pressures communities to adapt traditional practices for visitors.	"We want to keep our culture genuine, but sometimes we feel we're performing rather than sharing." — Community Elder
		"There's a pressure to cater to tourist tastes, which can dilute the authenticity of our cuisine." — Local Vendor
Seasonal Fluctuations in Tourism	Tourist numbers can be highly seasonal, leading to business instability, as rural areas may experience periods of both high demand and low visitor numbers.	"We're very busy in peak seasons, but it's hard to sustain income during the off-season." — Business Owner
		"When tourists only come during certain times, it's challenging for us to plan and keep operations steady." — Rural Resident

The challenges and limitations faced by rural communities in Iloilo due to food blogger-driven tourism, highlighting issues like dependency on influencers, overtourism risks, cultural authenticity pressures, and seasonal fluctuations, with participant quotes for context, are summarized in Table 4.

9. Discussion

The culinary landscape of Iloilo Province is a vibrant tapestry of authentic and unique dishes that showcase the province's rich cultural heritage and culinary tradition. These dishes not only highlight the creativity of Iloilo's culinary artisan but also serve as a gateway for visitors to experience the province's history and culture through its flavours. Gastronomic tourism has become a driving force in attracting tourists to Iloilo and significantly contribute to province's economic growth. Promotion of food tourism enhances the province's visibility on the global map, enticing travellers to explore Iloilo Province culinary treasures. Food bloggers and content influencers play a vital role in promoting sustainable gastronomic tourism. Sharing stories, stunning visuals and reviews of Iloilo Province culinary gems, food bloggers amplify awareness and inspire tourists among young and tech savvy travellers. The synergy between gastronomic tourism and sustainability ensures that economics gains trickle down to rural communities fostering economic growth. The present study explores how food bloggers contribute to fostering a sustainable gastronomic tourism practice while supporting rural economic growth.

The findings of the study align closely with Social Influence Theory, demonstrating how bloggers' credibility, perceived expertise, and social proof significantly shape tourist behaviours and decisions. Food bloggers, viewed as knowledgeable and trustworthy sources, create social proof by showcasing unique culinary and cultural experiences, effectively positioning rural destinations as desirable places to visit. This credibility, coupled with visually engaging content, amplifies their influence on potential tourists, driving interest and visits to lesser-known areas. For rural tourism development, these insights suggest that communities can benefit from strategic partnerships with food bloggers, creating mutually beneficial collaborations that support sustainable tourism while respecting local resources and culture. Moreover, authenticity in bloggers' portrayals is critical to fostering trust and engagement among tourists; genuine representation of rural lifestyles and traditions resonates more deeply with audiences, enhancing both their willingness to visit and appreciation for local heritage. By emphasizing authenticity and fostering sustainable practices, rural communities can use digital influence to achieve economic growth that honours and preserves their cultural identity.

10. Conclusion and Recommendations

In summary, this study highlights the significant role of food bloggers in influencing tourism within rural economies, particularly through mechanisms of credibility, social proof, and authentic portrayal. Findings show

that food bloggers drive increased tourist interest and engagement by showcasing local culture and culinary traditions, providing rural areas with a boost in visibility, customer inflow, and economic empowerment.

This study contributes to the literature by applying Social Influence Theory to an underexplored context, illustrating how digital influence can serve as a catalyst for rural tourism growth. Social media has significantly transformed tourism promotions through different ways reaching global audiences. This creates visibility, influence travel decisions and appeal to potential tourists a key player modern promotion. While food bloggers have positive impacts on rural economies, challenges such as dependency on influencers, overtourism risks, and pressures on cultural authenticity underscore the need for balanced and sustainable approaches in digital tourism promotion.

To maximize these positive outcomes, rural tourism boards should establish strategic partnerships with food bloggers who demonstrate a commitment to authenticity and cultural sensitivity. Local businesses can further support these efforts by offering unique, high-quality experiences that align with the bloggers' content, ensuring that tourists receive an immersive experience. Food bloggers, in turn, should aim to collaborate closely with local stakeholders to ensure accurate representation and promote sustainable practices.

This study is limited to Iloilo Province Philippines and focuses on selected participants which is directly involve promoting sustainable gastronomic tourism. It is recommended to include broader geographic scope and incorporate additional categories of respondents to provide a more comprehensive result. Future research could focus on longitudinal studies to assess the lasting impacts of food blogger-driven tourism on rural communities, as well as comparative studies across different regions to understand the cultural nuances of digital influence in tourism. Such research would offer further insights into the long-term sustainability of digital tourism and provide more nuanced recommendations for rural economic development.

References

- Aral, S., & Walker, D. (2012). Identifying influential and susceptible members of social networks. *Science*, 337(6092), 337-341. <https://doi.org/10.1126/science.1215842>
- Elena, C. (2020). The Impact of Social Media on Tourism Destination Choice. *Tourism Review*, 75(1), 120-135. <https://doi.org/10.1108/TR-11-2019-0465>
- Everett, S. (2019). *Food and Drink Tourism: Principles and Practice*. Springer. <https://doi.org/10.1007/978-1-137-58633-7>
- Fernandes, C., & Castro, L. (2023). Digital Influencers in Tourism Marketing: The Role of Food Bloggers in Promoting Culinary Tourism. *Journal of Tourism and Gastronomy Studies*, 11(2), 243-258. <https://doi.org/10.1016/j.jtgs.2022.102052>
- Hays, S., Page, S. J., & Buhalis, D. (2021). Social Media as a Tool for Destination Marketing Organizations: A Focus on Small Tourism Destinations. *Current Issues in Tourism*, 24(6), 741-752. <https://doi.org/10.1080/13683500.2021.1887674>
- Hjalager, A. M., & Richards, G. (2021). *Tourism and Gastronomy*. Routledge. <https://doi.org/10.4324/9781315186925>
- Kelman, H. C. (1958). Compliance, identification, and internalization: Three processes of attitude change. *The Journal of Conflict Resolution*, 2(1), 51-60. <https://doi.org/10.1177/002200275800200106>
- Kim, J., & Tussyadiah, I. P. (2021). Social Influence in Travel Decision-Making: Examining the Role of Social Media. *Tourism Management*, 84, 104284. <https://doi.org/10.1016/j.tourman.2020.104284>
- Lim, X. J., Radzol, A. R. M., Cheah, J. H., & Wong, M. W. (2017). The impact of social media influencers on purchase intention and the mediation effect of customer attitude. *Asian Journal of Business Research*, 7(2), 19-36. <https://doi.org/10.14707/ajbr.170035>
- Long, L. M. (2020). *Culinary Tourism: A Tasting of a New Trend*. SAGE Publications. <https://doi.org/10.4135/9781529714437>
- Lune, H., & Berg, B. L. (2017). Qualitative research methods for the social sciences: Pearson.
- Munar, A. M., & Jacobsen, J. K. S. (2021). Social Media and Tourism Studies: An In-Depth Review. *Tourism Management Perspectives*, 31, 124-133. <https://doi.org/10.1016/j.tmp.2021.100924>
- Miguéns, J., Baggio, R., & Costa, C. (2018). Social Media and Tourism Destinations: Factors Influencing Online Reputation. *Journal of Travel Research*, 57(1), 97-108. <https://doi.org/10.1177/0047287517721377>
- Prasad, M., & Garcia, C. (2017 September 11). How to Conduct a Successful Focus Group Discussion. From <https://humansofdata.atlan.com/2017/09/conduct-successful-focus-group-discussion>
- Tümen-Akyıldız, S., & Ahmed, K.H. (2021). An overview of qualitative research and focus group discussion. *Journal of Academic Research in Education*, 7(1), 1-15. DOI: 10.17985/ijare.866762

From Virtual to Reality: Enhancing Cultural Tourism Through AI, VR, and the Metaverse

Pedro Álvaro Pereira Correia

University of Madeira - Faculty of Social Sciences & CITUR, Funchal, Portugal

pacorreia@staff.uma.pt

Abstract: This paper examines the transformative role of Artificial Intelligence (AI) in cultural tourism, highlighting its integration with advanced digital platforms such as the Metaverse, Virtual Reality (VR), and Augmented Reality (AR). Traditionally, cultural tourism centers on immersive engagement with the tangible and intangible heritage of destinations. However, the adoption of AI and related digital technologies is revolutionizing how visitors interact with cultural artifacts and practices, creating personalized and deeply engaging experiences that were previously unattainable. AI enhances the tourist experience by offering adaptive and intelligent platforms that personalize interactions based on real-time data analysis of visitor preferences and behaviors. This capability significantly enriches educational outcomes and visitor satisfaction by providing culturally relevant, context-aware content in multiple languages, thereby increasing accessibility and inclusivity. In virtual settings, such as the Metaverse, AI-driven interfaces allow for the creation of deeply immersive environments where users can interact with cultural heritage in ways that respect and preserve the authenticity of the original sites, thus supporting sustainable tourism practices. Moreover, the use of VR and AR technologies, powered by AI, introduces unprecedented levels of interaction and immersion, making cultural tourism more vibrant and engaging. These technologies allow tourists to explore historical reconstructions or deeply engage with cultural narratives without the physical intrusion that can lead to site degradation. However, this digital transformation presents significant challenges, notably in the commodification of culture and the potential loss of authenticity in cultural representations. This paper advocates for a balanced approach to integrating AI, VR, and AR technologies, such as the Metaverse, in cultural tourism. It emphasizes that technological advancements should enhance the visitor experience while preserving the intrinsic cultural value of heritage sites. By outlining a roadmap for responsible and sustainable implementation, this study seeks to contribute to the ongoing discourse on leveraging technology to enrich cultural tourism while upholding ethical standards and preserving cultural integrity.

Keywords: Artificial intelligence, Cultural tourism, Digital innovation, Metaverse, Sustainable tourism, Augmented reality, Virtual reality, Heritage preservation, Immersive technology

1. Introduction

Cultural tourism has traditionally provided immersive experiences that connect visitors with the tangible and intangible heritage of destinations. However, the rapid advancement of digital technologies—such as Artificial Intelligence (AI), Virtual Reality (VR), Augmented Reality (AR), and the Metaverse—is fundamentally reshaping how tourists interact with cultural sites and narratives (Buhalis et al., 2023; Correia, P., 2025). These technologies are not merely innovative tools but serve as transformative enablers, offering more personalized, immersive, and accessible cultural tourism experiences.

The Metaverse, a digital environment that merges physical and virtual worlds, enables users to engage with cultural heritage in unprecedented ways (Liu & Park, 2024). Through AI-powered interfaces, tourists can dynamically interact with historical sites and cultural narratives, introducing new levels of immersion and interaction. This integration facilitates the exploration of historical reconstructions and meaningful engagement with cultural artifacts without requiring physical site visits (Zhang & Wang, 2023). Additionally, AI-driven personalization enhances visitor satisfaction and fosters deeper cultural engagement by tailoring experiences to individual preferences.

Despite its transformative potential, this digital evolution is not without challenges. Critical issues include the commodification of culture, risks to the authenticity of cultural representations, and ethical concerns related to data privacy and sustainability (Chen et al., 2023). As cultural tourism increasingly relies on digital platforms, it becomes imperative to balance technological innovation with the preservation of cultural integrity and the authenticity of visitor experiences.

This paper examines the transformative impact of AI and the Metaverse on cultural tourism, focusing on how these technologies enhance visitor engagement while safeguarding cultural heritage. By analyzing the benefits, challenges, and ethical considerations, the study offers a roadmap for the responsible and sustainable integration of these technologies into cultural tourism. This research contributes to the broader discourse on leveraging AI and immersive technologies to enrich cultural tourism, emphasizing the importance of ethical practices and the preservation of cultural value.

Guiding Research Questions

To investigate the opportunities and challenges associated with the integration of AI and the Metaverse in cultural tourism, this paper is structured around the following key research questions:

1. How can AI and the Metaverse enhance visitor engagement and interaction in cultural tourism?

This question examines the ways in which AI-driven platforms and immersive technologies facilitate deeper, more personalized interactions between tourists and cultural heritage sites. By focusing on adaptive, real-time content delivery, multisensory engagement, and dynamic cultural narratives, the analysis seeks to understand how these technologies enrich the visitor experience.

2. What are the potential challenges and ethical concerns related to the integration of these technologies in cultural tourism?

This question addresses critical issues such as the commodification of culture, the authenticity of virtual representations, and the privacy and security of visitor data. The exploration also considers the sustainability implications of AI and immersive technologies, including the energy demands of VR and AR platforms. These challenges underscore the need for careful implementation strategies to avoid compromising cultural value and ethical principles.

3. How can AI and immersive technologies be integrated into cultural tourism to preserve cultural integrity and promote sustainable practices?

This question seeks to outline a framework for the responsible and sustainable adoption of AI, VR, and Metaverse technologies in cultural tourism. The emphasis is on balancing technological innovation with cultural preservation and ethical considerations, ensuring these technologies enhance rather than detract from the cultural value of heritage sites.

By addressing these questions, this paper aims to provide a comprehensive understanding of how AI and the Metaverse can transform cultural tourism while upholding ethical standards, sustainability goals, and the preservation of cultural integrity. The findings will contribute to the broader discourse on integrating advanced technologies into tourism in a manner that enriches visitor experiences and supports heritage conservation.

2. Methodology

This study adopts a systematic review to analyze the role of AI and the Metaverse in enhancing cultural tourism. By synthesizing existing literature, the review explores how these technologies improve visitor engagement, preserve cultural heritage, and promote sustainable tourism practices. The methodology follows established guidelines from Liberati et al. (2009) and Moher et al. (2009) to ensure rigor and transparency.

A literature search was conducted in the Web of Science (WoS) database, focusing on publications from 2012 to 2024. Using keywords such as "Metaverse," "Tourism," and "Cultural," the search identified studies addressing the Metaverse's impact on cultural preservation, visitor experiences, and sustainability. Inclusion criteria ensured only English-language, peer-reviewed articles engaging with tourism or business applications were selected, excluding studies that lacked contextual relevance. From an initial 193 articles, 42 met these criteria for detailed analysis.

Key themes identified included visitor engagement, cultural preservation, sustainability, and ethical concerns such as data privacy and cultural commodification. The analysis emphasized how AI, VR, and the Metaverse contribute to these areas while promoting authenticity and sustainable practices. Only articles published in journals listed by the Chartered Association of Business Schools (ABS) were included to ensure quality and reliability.

Limitations include the exclusion of non-English publications and grey literature, which may have introduced a publication bias. Nonetheless, the systematic review provides a robust foundation for understanding the integration of the Metaverse in cultural tourism, offering valuable insights for future research and practical applications.

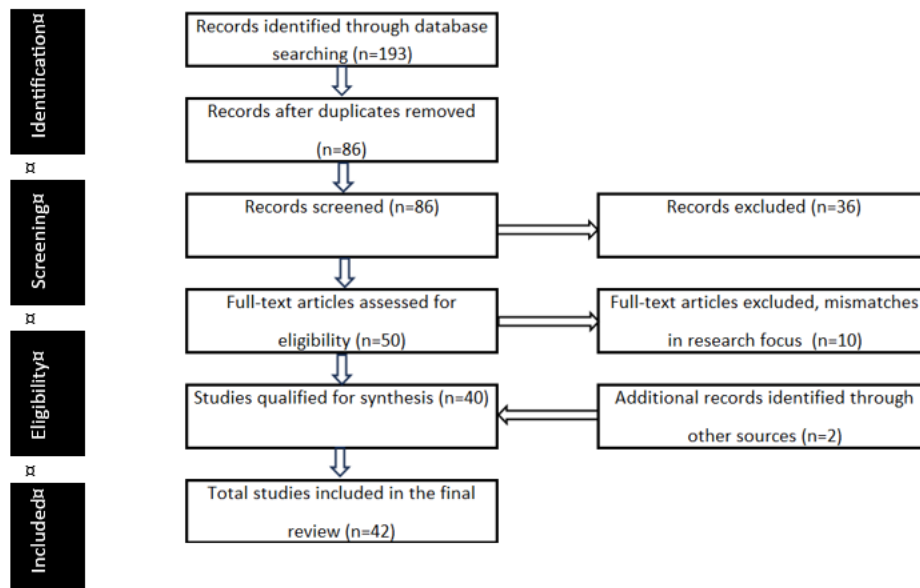


Figure 1: The PRISMA Flowchart details the identification, screening, eligibility, and inclusion phases of the systematic review process. It provides a visual representation of how the initial 193 records were narrowed down to the final 42 studies included in this review (Source: Adapted from Moher et al., 2009 and Yang et al., 2017)

3. Results and Discussion

3.1 Overview of Literature and Trends

The systematic review revealed a growing body of research focused on integrating AI, VR, and the Metaverse within cultural tourism. The literature highlights these technologies' transformative potential in enhancing visitor engagement and accessibility. Studies emphasize that AI-powered platforms create highly personalized experiences by analyzing visitor data in real-time, tailoring content to individual preferences, behaviors, and cultural backgrounds (Buhalis et al. 2023; Zhang & Wang 2023; Correia, P., 2025). This personalization is crucial in offering engaging and meaningful interactions with cultural heritage.

A significant emphasis is placed on VR and AR technologies, recognized for offering virtual access to cultural sites that may be geographically distant or physically restricted (Liu & Park 2024). VR and AR enable detailed reconstructions of historical environments, offering educational and entertaining experiences. In terms of cultural preservation, these technologies can replicate vulnerable or endangered heritage sites, allowing tourists to engage without contributing to physical degradation.

The integration of AI, VR, and the Metaverse is associated with a shift towards more sustainable tourism practices. As destinations face overtourism and environmental concerns, these technologies mitigate the ecological impact of physical travel (Jung et al. 2024). Virtual tourism allows engagement with cultural heritage without physical visitation, reducing carbon footprints and lessening wear on fragile sites.

However, substantial concerns exist regarding potential commodification of culture in virtual spaces. Scholars argue that while digital platforms democratize access to cultural experiences, they risk oversimplifying or misrepresenting complex cultural narratives (Chen et al. 2023). The tension between technological innovation and cultural authenticity is a recurring theme, stressing the importance of maintaining cultural heritage integrity in digital environments.

Ethical concerns, particularly data privacy and security, are growing. AI-driven platforms collecting and analyzing visitor data raise questions about data use, storage, and protection. These concerns extend beyond individual privacy to digital sovereignty, especially in regions with sensitive cultural heritage (Zhang & Wang 2023).

To provide a clearer understanding of how this literature is distributed across different academic fields and time periods, **Table 1** shows the distribution of reviewed articles by journal, highlighting the leading sources of published work on metaverse in tourism. **Table 2** categorizes these studies by discipline and year of publication, offering insight into the progression and interdisciplinary nature of research in this field.

Table 1: Distribution by Journal

Journal Name	No. of studies	%
Information Technology & Tourism	12	29%
International Journal of Contemporary Hospitality Management	4	10%
Tourism Review	4	10%
Current Issues in Tourism	2	5%
Journal of Hospitality and Tourism Insights	2	5%
Journal of Hospitality Marketing & Management	2	5%
Journal of Retailing and Consumer Services	2	5%
Journal of Travel & Tourism Marketing	2	5%
Computers in Human Behavior	1	2%
International Journal of Information Management	1	2%
International Journal of Tourism Research	1	2%
Journal of Computer Information Systems	1	2%
Journal of Destination Marketing & Management	1	2%
Journal of Hospitality & Tourism Research	1	2%
Journal of Vacation Marketing	1	2%
Psychology & Marketing	1	2%
The Service Industries Journal	1	2%
Tourism Economics	1	2%
Tourism Recreation Research	1	2%
Tourism Management	1	2%
TOTAL	42	100%

Table 2: Literature Profiles by Disciplines and Publication Years

Disciplines (No. of Journals)	No. of studies	2022	2023	2024
Hospitality and tourism (12)	22	1	19	2
Digital technology in tourism and hospitality (1)	12		12	
Marketing (3)	3		1	2
information technology (2)	2		1	1
hospitality marketing and management (1)	1	1		
information management (1)	1	1		
Services sector (1)	1		1	
Total	42	3	34	5

3.2 Research Contexts and Key Findings

The reviewed literature highlights the diverse research contexts exploring the Metaverse's application in tourism, particularly in enhancing cultural tourism through AI, VR, and AR. These studies collectively emphasize the transformative potential of immersive technologies in creating more engaging, accessible, and personalized tourism experiences. A predominant focus on overarching management and marketing strategies reveals the growing interest in leveraging the Metaverse to optimize operational efficiencies and enhance customer engagement within the tourism sector.

Specifically, the research encompasses several thematic areas, including the adoption of immersive technologies for heritage preservation, the use of AI to personalize visitor experiences, and the integration of the Metaverse

into sustainable tourism practices. Table 3 summarizes these contexts, categorizing them based on their thematic focus, methodologies, and key findings.

Table 3: Research Contexts and Key Findings

Research Focus	Description	Key Findings	Relevance to Cultural Tourism
Heritage Preservation and Accessibility	Studies explore VR/AR and the Metaverse as tools for digitally preserving cultural heritage and improving access to fragile or remote sites.	Immersive technologies enable virtual tours of endangered sites and digital replication of artifacts, enhancing visitor accessibility and educational value.	Provides sustainable solutions for preserving cultural integrity while allowing wider audience engagement with heritage.
Visitor Personalization via AI	Research examines AI-driven platforms that tailor cultural tourism experiences based on visitor preferences, behavior, and language.	AI enhances visitor satisfaction through real-time data analysis and adaptive content delivery, making experiences contextually relevant and inclusive.	Enables culturally rich, personalized experiences that attract diverse tourist demographics.
Immersive Storytelling and Engagement	Studies analyze how VR, AR, and the Metaverse create interactive, narrative-driven experiences for tourists.	Immersive storytelling deepens visitor engagement by combining visual, auditory, and interactive elements to bring cultural narratives to life.	Reinforces emotional connections to cultural heritage, fostering deeper appreciation and understanding of historical narratives.
Sustainable Tourism Practices	Research investigates virtual tourism's potential to reduce environmental impacts and alleviate pressures on overcrowded physical sites.	Virtual tourism through the Metaverse offers eco-friendly alternatives, reducing travel-related carbon emissions and minimizing physical degradation of heritage sites.	Aligns with global sustainability goals while ensuring cultural sites remain accessible and protected for future generations.
Operational Efficiencies in Tourism	Studies focus on the use of Metaverse technologies to streamline operations, such as staff training, event management, and virtual customer service.	Immersive platforms improve efficiency by simulating real-world scenarios for training and optimizing customer interaction through virtual channels.	Supports cost-effective and innovative approaches to managing cultural tourism businesses.
Users' Continuance Intentions and Behavior	Research examines factors influencing tourists' sustained use of Metaverse platforms and their perceptions of virtual cultural experiences.	Positive user experiences in the Metaverse significantly impact revisit intentions and long-term engagement with cultural tourism platforms.	Highlights the importance of creating meaningful, memorable virtual experiences to maintain tourist interest and loyalty.

3.3 Visitor Engagement and Immersion

AI, VR, and the Metaverse significantly impact enhancing visitor engagement and immersion. AI-driven platforms provide personalized experiences by adapting content to visitor preferences and behaviors (Buhalis et al. 2023). VR and AR transport visitors into reconstructed historical environments or allow visualization of cultural artifacts in original contexts, creating emotionally engaging experiences (Liu & Park 2024). The Metaverse introduces new interaction dimensions by creating persistent, shared virtual spaces for real-time exploration (Zhang & Wang 2023; Correia, P., 2025).

Challenges include potential over-commercialization, where cultural heritage is reduced to digital entertainment, risking loss of deeper meaning (Chen et al. 2023). Ensuring virtual experiences maintain cultural authenticity is critical for preserving cultural tourism integrity in the digital age.

3.4 Cultural Preservation and Authenticity

These technologies contribute to cultural preservation by providing alternative access to heritage sites. VR and AR create digital replicas of fragile or endangered sites, enabling virtual access without physical degradation

(Jung et al. 2024). Digital archiving and reconstruction ensure future generations access to cultural treasures, even if physical counterparts deteriorate (Liu & Park 2024).

However, digital replication risks diminishing experience authenticity. Virtual representations may oversimplify cultural narratives or fail to capture nuanced meanings (Chen et al. 2023). Balancing immersive technology use with maintaining site authenticity requires collaboration between technologists, cultural experts, and local communities.

3.5 Sustainability and Ethical Concerns

Virtual tourism mitigates environmental impacts like carbon emissions and site degradation from overtourism (Jung et al. 2024). AI-powered platforms enhance social sustainability by making cultural tourism more accessible to diverse groups, including those with disabilities or financial constraints.

Ethical concerns include data privacy and culture commodification. AI platforms collecting visitor data raise questions about data handling and consent, especially with sensitive cultural heritage (Zhang & Wang 2023). Commercializing cultural heritage in virtual environments risks trivializing its significance.

Responsible development practices, ethical data management, and commitment to cultural integrity are essential to ensure these technologies positively impact tourism.

3.6 Strategic Implications for Future Research and Practice

Future research should explore balancing technological innovation with cultural authenticity, developing guidelines for ethical virtual tourism, and involving local communities in digital representation decisions. Practitioners must implement technologies promoting sustainability and inclusivity while addressing data privacy and cultural commodification risks.

4. Discussion and Future Directions

The integration of AI, VR, and the metaverse into cultural tourism presents a significant opportunity to revolutionize the way tourists engage with cultural heritage. However, the current body of literature points to both the potential and limitations of these technologies in balancing innovation with cultural authenticity and sustainability. In this section, we discuss the implications of the findings from the systematic review and suggest future research directions to address existing gaps in knowledge.

4.1 Current State of Knowledge Regarding the Intersection of the Metaverse and Tourism

The current literature underscores the transformative potential of the metaverse in tourism, particularly in enhancing visitor engagement and accessibility. The metaverse, as a digital environment where virtual and physical realities converge, allows for immersive experiences that can bridge the gap between tourists and geographically distant cultural heritage sites. As highlighted in the reviewed studies, AI, VR, and AR technologies have begun to make significant inroads into the tourism sector, with applications ranging from virtual tours of historical sites to the creation of interactive cultural narratives (Buhalis et al. 2023; Liu & Park 2024, Correia, P., 2025).

At present, the metaverse is primarily utilized as a tool for creating immersive, multisensory experiences that augment or replace physical travel. The literature emphasizes that these technologies offer unique advantages in terms of visitor engagement. AI-driven platforms allow for the personalization of tourism experiences, adapting to individual preferences and behaviors in real-time, thus providing tourists with culturally relevant content (Zhang & Wang 2023). This capacity for personalization is one of the key strengths of the metaverse, making it a valuable tool for enhancing the educational and emotional impact of cultural tourism.

In addition to engagement, the metaverse has shown promise in promoting sustainability within tourism. Virtual tourism enables engagement with cultural heritage without the need for physical travel, thereby reducing the environmental footprint associated with tourism (Jung et al. 2024; Correia, P., 2025). This is particularly important for destinations that face pressures from overtourism or those that require the preservation of fragile or endangered cultural sites. By providing tourists with the opportunity to explore these locations virtually, the metaverse helps alleviate some of the ecological and conservation challenges associated with traditional tourism practices.

However, the literature also reveals that the adoption of metaverse technologies in tourism is still in its early stages. Many studies focus on the technical aspects of AI, VR, and AR without fully addressing the broader cultural, social, and ethical implications of their use in tourism. For example, while virtual experiences can

enhance accessibility and engagement, they may also risk commodifying culture or distorting the authenticity of cultural heritage (Chen et al. 2023). The metaverse's capacity to replicate cultural sites raises questions about the integrity of these digital representations and the potential oversimplification of complex cultural narratives.

Moreover, the review suggests that more research is needed on the long-term impact of metaverse adoption in tourism, particularly in understanding how virtual experiences influence tourist behavior and attitudes toward physical travel. Although the metaverse can provide an alternative to physical visitation, it remains unclear whether virtual tourism complements or competes with traditional tourism. Some studies suggest that virtual experiences may encourage future physical visits by providing tourists with a preview of destinations, while others indicate that virtual tourism could reduce the demand for actual travel (Liu & Park 2024; Correia, P., 2025). This uncertainty presents an important area for further exploration.

4.2 Answering the Research Questions

This study sets out to investigate the role of AI, VR, and the metaverse in enhancing cultural tourism, guided by three key research questions. Based on the findings from the systematic review, each of these questions can be addressed as follows:

How can AI, VR, and the metaverse enhance visitor engagement and interaction in cultural tourism?

The literature consistently highlights that AI-driven personalization, alongside the immersive capabilities of VR and AR, significantly enhances visitor engagement. AI's ability to analyze real-time data on visitor preferences and behaviors allows for personalized experiences that can adapt to the cultural, linguistic, and informational needs of individual tourists (Buhalis et al. 2023; Correia, P., 2025). VR and AR technologies offer tourists the opportunity to experience cultural heritage in ways that would not be possible through physical visitation alone, enabling virtual reconstructions of historical sites and interactive cultural narratives that deepen engagement (Liu & Park 2024). The metaverse, by merging virtual and real-world experiences, further enhances interaction by allowing tourists to explore cultural environments collaboratively and in real-time.

What are the potential challenges and ethical concerns related to the integration of these technologies in cultural tourism?

The review revealed several challenges associated with the use of AI, VR, and the metaverse in cultural tourism. Chief among these is the risk of commodifying cultural heritage, reducing complex cultural narratives to simplified digital experiences for entertainment purposes (Chen et al. 2023). There are also concerns regarding the authenticity of virtual representations of cultural sites, as digital recreations may fail to capture the nuanced significance of these heritage locations. Ethical concerns around data privacy were also prevalent, with AI-driven platforms raising questions about how visitor data is collected, stored, and used (Zhang & Wang 2023; Correia, P., 2025). These challenges underscore the need for careful consideration of how these technologies are implemented, ensuring that cultural integrity and ethical standards are upheld.

How can AI and immersive technologies be integrated into cultural tourism in a way that preserves cultural integrity and promotes sustainable practices?

The literature suggests that AI, VR, and the metaverse can indeed be integrated into cultural tourism in ways that support both cultural preservation and sustainability, but only with responsible development. Sustainable virtual tourism practices can help mitigate the environmental impact of physical travel, especially to fragile or endangered sites (Jung et al. 2024; Correia, P., 2025). To preserve cultural integrity, however, close collaboration between technologists, cultural heritage experts, and local communities is crucial. This ensures that digital platforms represent cultural heritage accurately and respectfully. Furthermore, AI-driven personalization should aim to educate and inform tourists about the significance of the cultural heritage they are experiencing, rather than just providing entertainment.

4.3 Future Research for Metaverse in Business Services

As AI, VR, and the Metaverse become increasingly integrated into cultural tourism, there is a growing need for research exploring their wider implications within the business services sector. The potential applications of the Metaverse extend well beyond tourism, and its future development as a business tool is likely to have significant impacts across industries.

Future research should focus on how the Metaverse can create new service models within business contexts, particularly in sectors such as education, healthcare, and retail. In these areas, the Metaverse can provide immersive, interactive experiences bridging the gap between virtual and physical environments, offering

personalized services catering to individual users' needs. For example, in education, AI-driven virtual classrooms could provide highly tailored learning experiences, while in healthcare, VR-based therapies could offer personalized treatment options (Jung et al. 2024; Correia, P., 2025). Additionally, further empirical studies are needed to assess how virtual experiences translate into actual tourist behavior, including visit intentions and long-term engagement with cultural destinations (Zhang & Wang 2023; Correia, P., 2025). Understanding how these technologies can improve customer experience and service delivery across various industries will be critical for future business innovation.

Moreover, research should explore the economic implications of the Metaverse, particularly how businesses can monetize virtual experiences and digital assets. Virtual environments in the Metaverse can serve as platforms for the creative arts, immersive storytelling, and digital cultural exhibitions (Dwivedi et al. 2023). This combination of culture and creativity has the potential to generate revenue through digital experiences, exclusive virtual events, and the sale of virtual goods and non-fungible tokens (NFTs), creating a novel economic ecosystem (Koo et al. 2023). However, as with cultural tourism, businesses must carefully balance commercial interests with ethical considerations, ensuring that digital products and services do not exploit consumers or undermine cultural or societal values (Chen 2023).

Another critical area for future research is the regulatory framework surrounding the use of AI, VR, and the Metaverse in business services. As these technologies become more widespread, there is an increasing need for regulations that protect consumer data, ensure transparency in AI-driven decision-making, and safeguard against the commodification of cultural and social experiences. Policymakers and business leaders must work together to develop guidelines that promote innovation while protecting the rights and interests of consumers.

5. Conclusion

This paper has examined the transformative potential of Artificial Intelligence (AI), Virtual Reality (VR), and the Metaverse in cultural tourism through a systematic review of current knowledge and emerging trends. The findings demonstrate that these technologies have the capacity to significantly enhance visitor engagement, preserve cultural heritage, and support sustainable tourism practices.

AI's ability to personalize visitor experiences through real-time data analysis has revolutionized interactions with cultural heritage. By tailoring content to individual preferences, AI ensures cultural experiences are relevant, accessible, and deeply engaging. Similarly, VR and AR technologies create immersive environments that allow tourists to explore cultural heritage in innovative ways, such as virtual reconstructions of historical sites. These technologies open new opportunities for connecting tourists with cultural narratives that might otherwise remain inaccessible due to geographical or physical constraints. The Metaverse, as a convergence of AI, VR, and AR, provides unprecedented possibilities for interaction, education, and entertainment in cultural tourism.

Despite these advancements, integrating these technologies also presents challenges. The commodification of culture and the potential loss of authenticity in virtual experiences are recurring concerns in the literature. Moreover, data privacy and ethical considerations regarding the use of AI-driven platforms must be addressed to ensure that digital transformation does not compromise the integrity of cultural heritage. Navigating the balance between technological innovation and cultural authenticity is critical to preserving the intrinsic value of cultural heritage.

The study also highlights the role of these technologies in promoting sustainability within tourism. Virtual tourism can reduce the environmental impacts associated with physical travel, particularly to fragile or endangered heritage sites. By offering eco-friendly alternatives, these technologies mitigate the negative effects of overtourism. However, for their benefits to be fully realized, it is essential to adopt responsible development practices that prioritize the long-term preservation of cultural heritage.

The review identifies several avenues for future research. There is a pressing need for empirical studies that explore the long-term effects of virtual tourism on visitor behavior, as well as investigations into how AI, VR, and the Metaverse can be integrated into tourism to support both cultural preservation and economic sustainability. Moreover, future studies should examine the broader implications of these technologies beyond cultural tourism, particularly in other business services, where they have the potential to create innovative service models and reshape customer experiences.

In conclusion, AI, VR, and the Metaverse offer exciting opportunities to enrich cultural tourism and advance sustainability goals. However, their implementation requires thoughtful consideration to preserve cultural authenticity and address ethical concerns. As these technologies evolve, they are poised to reshape not only the

tourism industry but also the wider landscape of business services, offering innovative solutions that seamlessly bridge virtual and physical worlds.

Acknowledgement

"Funded by national funds through FCT—Portuguese Science and Technology Foundation, within the project reference UIDB/04470/2020. DOI 10.54499/UIDB/04470/2020 <https://doi.org/10.54499/UIDB/04470/2020>."

References

- Ampountolas, A., Menconi, G., & Shaw, G. (2023) 'Metaverse research propositions: Online intermediaries', *Tourism Economics*. <https://doi.org/10.1177/13548166231159520>
- Buhalis, D. (2023) 'Smart hospitality: From smart cities and smart tourism towards agile business ecosystems in networked destinations', *International Journal of Contemporary Hospitality Management*, 35(1), pp. 369-393. <https://doi.org/10.1108/IJCHM-05-2022-0631>
- Buhalis, D., Lin, M. S., & Leung, D. (2023) 'Metaverse as a driver for customer experience and value co-creation: Implications for hospitality and tourism management and marketing', *International Journal of Contemporary Hospitality Management*, 35(2), pp. 701-716. <https://doi.org/10.1108/IJCHM-05-2022-0631>
- Chen, S., Chan, I. C. C., Xu, S., Law, R., & Zhang, M. (2023) 'Metaverse in tourism: Drivers and hindrances from stakeholders' perspective', *Journal of Travel & Tourism Marketing*, 40(2), pp. 169-184. <https://doi.org/10.1080/10548408.2023.2227872>
- Correia, P., (2025). Metaverse in Tourism: A Pathway to Sustainability and Regeneration. *International Journal of Technology Management & Sustainable Development*. ISSN: 1474-2748
- Dwivedi, Y. K., Hughes, L., Wang, Y., Alalwan, A. A., Ahn, S. J. G., Balakrishnan, J., Barta, S., Belk, R., Buhalis, D., Dutot, V., Felix, R., Filieri, R., Gustafsson, A., Hinsch, C., Hollensen, S., Jain, V., Kim, J., Krishen, A. S., Lartey, J. O., ... Wirtz, J. (2023). Metaverse marketing: How the metaverse will shape the future of consumer research and practice. *Psychology & Marketing*, 40(4), 750-776. <https://doi.org/10.1002/mar.21767>
- Jung, T., Cho, J., Han, D. I. D., Ahn, S. J. G., Gupta, M., Das, G., et al. (2024) 'Metaverse for service industries: Future applications, opportunities, challenges and research directions', *Computers in Human Behavior*, 151, 108039. <https://doi.org/10.1016/j.chb.2023.108039>
- Koo, C., Kwon, J., Chung, N., & Kim, J. (2023). Metaverse tourism: Conceptual framework and research propositions. *Current Issues in Tourism*, 26(20), 3268-3274. <https://doi.org/10.1080/13683500.2022.2122781>
- Liberati, A., Altman, D. G., Tetzlaff, J., Mulrow, C., Gøtzsche, P. C., Ioannidis, J. P. A., & Moher, D. (2009). The PRISMA statement for reporting systematic reviews and meta-analyses of studies that evaluate health care interventions: Explanation and elaboration. *Annals of Internal Medicine*, 151, W-65. <https://doi.org/10.7326/0003-4819-151-4-200908180-00136>
- Liu, H., & Park, K.-S. (2024) 'Exploring the impact of metaverse tourism experiences on actual visit intentions: An integrated model of presence, the Technology Acceptance Model, and the Theory of Planned Behavior', *International Journal of Tourism Research*, 26(1), e2616. <https://doi.org/10.1002/itr.2616>
- Mikki, S. (2009). Google Scholar compared to Web of Science. A literature review. *Nordic Journal of Information Literacy in Higher Education*, 1(1). <https://doi.org/10.15845/noril.v1i1.10>
- Moher, D., Liberati, A., Tetzlaff, J., & Altman, D. G. (2009). Preferred reporting items for systematic reviews and meta-analyses: The PRISMA statement. *Annals of Internal Medicine*, 151(4), 264-269. <https://doi.org/10.7326/0003-4819-151-4-200908180-00135>
- Yang, E. C. L., Khoo-Lattimore, C., & Arcodia, C. (2017). A systematic literature review of risk and gender research in tourism. *Tourism Management*, 58, 89–100. <https://doi.org/10.1016/j.tourman.2016.10.014>
- Zhang, W., & Wang, Y. (2023) 'An empirical study of the impact of metaverse storytelling on intentions to visit', *Information Technology & Tourism*, 25(3), pp. 411–432. <https://doi.org/10.1007/s40558-023-00261-0>

Embracing History and Cultural Heritage Through the Chinese Hanfu Costume Tourism

Xin Cui, Ziqian Song and Xiaoyun Tang

China Tourism Academy (Data Centre of Ministry of Culture and Tourism), Beijing, China

965376489@qq.com

981067320@qq.com

ctatourism08@126.com

Abstract: Cultural heritage tourism is conceptually framed by the dialectic between heritage conservation imperatives and commercial market demands, while intangible cultural heritage tourism encompasses the experiential engagement with performative, craft-based, and ritualistic practices that encapsulate both historical and contemporary socio-cultural narratives. Dressing in traditional costumes represents an emergent phenomenon within this paradigm, particularly in China, where Hanfu has gained prominence as an instrument for cultural immersion and intangible heritage preservation. By the end of 2023, the number of Hanfu enthusiasts in China exceeded 9 million, reflecting an exponential increase and highlighting the rapid evolution of this market segment. Employing a quantitative research design, this study utilises an online questionnaire survey administered to a sample of 476 adult tourists. This study aims to critically examine the underlying motivations that drive tourists to engage in traditional costume tourism, with a particular focus on Hanfu costume tourism in China. The findings elucidate three principal motivations underlying participation in Hanfu costume tourism. First, Hanfu functions as a critical medium for immersive cultural heritage engagement, facilitating a deeper connection with traditional culture while simultaneously satisfying tourists' aesthetic aspirations and non-quotidian self-presentation. Second, the proliferation of Hanfu-related content on social media significantly influences tourist decision-making processes, reinforcing aspirational and performative dimensions of engagement. Third, the widespread adoption of Hanfu reflects an intensified cultural identification among Chinese tourists with their indigenous heritage, concomitant with a pronounced inclination towards cultivating ritualistic and affective dimensions within their travel experiences. This research makes a substantive contribution to the discourse on cultural heritage tourism by elucidating the interrelationship between traditional costume engagement and heritage tourism motivations. The findings offer valuable theoretical and practical insights for the strategic integration of traditional costume elements into cultural heritage tourism frameworks, thereby advancing both the preservation of intangible heritage and the enhancement of tourist experiences through embodied cultural participation.

Keywords: Hanfu costume tourism, Cultural tourism, Heritage, Travel motivation, Tourist experience

1. Introduction

Over recent decades, scholars have increasingly focused on cultural tourism, though a universally accepted definition remains elusive. McKercher and Du Cros (2002, p.3) highlight the diversity of definitions, noting that 'there are almost as many definitions...as there are cultural tourists'. Richards (2003) adds that defining cultural tourism is challenging due to the complexity of defining 'culture' itself. Cultural tourism activities encompass a wide range of attractions, including heritage sites, festivals, rituals, artistic performances, and architectural landmarks (Bonetti et al., 2014; Singh & Najar, 2020). This diversity reflects the multifaceted nature of cultural tourism. Furthermore, the intrinsic link between culture and tourism suggests that all forms of tourism may involve cultural experiences (Richards, 2018; MacCannell, 1976).

Hanfu, the traditional attire of the Han ethnic group, originated during the Han Dynasty (202 BC–220 AD) and symbolises ancient Chinese values such as order, etiquette, and identity recognition (Chen, 2022). However, the term 'Hanfu' lacks a standardised definition. Broadly, it refers to traditional Han ethnic clothing, while narrowly, it signifies Han Dynasty attire (Wang, 2013; Yin, 2021). Modern Hanfu, influenced by traditional styles, emerged after the Xinhai Revolution as a cultural adaptation aligning with contemporary Chinese identity (Zhou et al., 2019). In tourism industries, Hanfu costume tourism often features this modern iteration, redesigned for modern aesthetics and commercial appeal (Huang, 2023). Since the early 21st century, Hanfu culture has been reintroduced to the market, sparking its expansion and integration into tourism activities. Increasingly, destinations in China and beyond are embracing Hanfu-themed tourism, contributing to the rise of Hanfu costume tourism (Huang, 2023).

While existing studies examine tourists' experiences and destinations' integration of Hanfu culture (e.g., Hansen, 2004; Dodds et al., 2016; Liu & Wang, 2022; Huang, 2023), limited research addresses the motivations behind tourists choosing Hanfu over everyday clothing. Understanding these motivations can illuminate the connection between pre-trip motivations and on-site activities, providing insights for destinations to incorporate Hanfu culture more effectively into their tourism products. This paper explores the motivations driving Hanfu costume tourism. It begins by reviewing key concepts, including cultural tourism and cultural heritage tourism, Hanfu

costume tourism, and travel motivations. Using a descriptive quantitative methodology, this study employs online surveys of 476 Hanfu costume tourists to investigate the self-centered (intrinsic) and socially-driven (extrinsic) motivations (Pearce, 1988; Pearce & Lee, 2005), as well as mixed travel motivations, for dressing in Hanfu at tourism destinations. The results of this study will provide deeper insights into the role of Hanfu in enriching cultural tourism experiences, which will be discussed in the subsequent sections of this paper.

2. Literature Review

2.1 Cultural Tourism and Cultural Heritage Tourism

Cultural tourism has been defined in numerous ways, reflecting the diverse perspectives of both scholars and tourists (McKercher & Du Cros, 2002). Richards (2003) emphasises the challenge of defining cultural tourism, as the term 'culture' itself is inherently complex. Cultural tourism attractions often include heritage sites, festivals, rituals, monuments, and artistic or cultural expressions (Bonetti et al., 2014; Singh & Najar, 2020). This diversity underscores the wide-ranging nature of cultural tourism activities. Moreover, culture and tourism are deeply interconnected, leading some scholars to argue that all tourism has a cultural dimension (Richards, 2003, 2018; MacCannell, 1973). Cultural tourism encompasses various forms, such as heritage tourism, arts tourism, gastronomic tourism, film tourism, and creative tourism (Richards, 2018). Among these, cultural heritage tourism focuses on the cultural significance of destinations, often aligned with tourists' personal heritage connections (Poria et al., 2003). Recent research has expanded the concept of heritage to include both tangible and intangible elements. However, Smith (2006) contends that all heritage is ultimately intangible, emphasising the meanings, values, and memories associated with heritage over its physical forms. Heritage, as a cultural process, engages acts of remembering to help individuals understand and interact with the present (Smith, 2006). In this view, heritage sites and objects act as tools for memory-making rather than ends in themselves. In this way, Hanfu serves as a carrier of historical and cultural memory. Its significance lies not in the physical garment but in the meanings and values it conveys. As such, the distinction between tangible and intangible heritage becomes less important. Hanfu represents a dynamic cultural heritage rooted in people's emotional, cultural, and experiential engagement. Thus, the importance of Hanfu as cultural heritage is grounded in how it helps people interpret and connect with the past. Its role in shaping individual and collective memory, history, and cultural understanding highlights the priority of its impact and meaning over its classification. This underscores Hanfu's enduring relevance as a living cultural symbol in contemporary society.

2.2 Hanfu Costume Tourism

Previous studies suggest that traditional clothing experiences significantly enhance tourists' perceptions of cultural destinations (Lee & Lee, 2019). Many tourist sites now incorporate traditional attire into their marketing to attract tourists (Zhong et al., 2023). Hanfu, as a traditional Chinese garment, is a vital element of the nation's heritage (Chen, 2022), enriching tourists' activities at cultural sites (Zhong et al., 2023; Huang, 2023). Despite Hanfu's deep history and the rising popularity of Hanfu costume tourism, especially among young Chinese tourists (Zhong et al., 2023; Yan, 2023; Zhou & Zhu, 2024), there is no consistent academic definition for this form of tourism. Hanfu costume tourism involves tourists dressing in modern Hanfu to visit destinations, engaging in cultural and experiential activities (Huang, 2023). Some researchers also focus on tourists' experiences, highlighting Hanfu's role in creating ritual, fostering cultural immersion, and expressing national identity (Zhong et al., 2023; Zhou & Zhu, 2024). Understanding tourists' motivations for dressing Hanfu at cultural sites can reveal valuable insights into Hanfu costume tourism and its impact on cultural heritage engagement.

2.3 Intrinsic, Extrinsic, and mix Travel Motivations

Tourist motivations can be understood as a mental state compelling an individual to travel, and later interpreted as a valid reason for their choice (Dann, 1981). From the tourist's perspective, these motivations include both internal and external factors that guide their destination selections. Tourism scholars have studied these motivations from various perspectives, categorising them to better understand tourists' interests and behaviours (e.g., Crompton, 1979; Dann, 1981; Pearce, 1988; Mansfeld, 1992). According to Crouch (et al., 2005), tourist experiences are shaped by motivations, activities, and reflections. For Hanfu costume tourists, their motivations can influence their on-site activities, which in turn, shape future travel experiences related to Hanfu.

The 'intrinsic-extrinsic' motivation framework, developed by Mansfeld (1992), is widely used in tourism research. Leitao (2022) explains that motivations can be segmented into extrinsic and intrinsic factors, revealing deeper needs and values from different perspectives. Mokhtarian et al. (2015) highlight self-determination theory, which identifies three motivation types: intrinsic (driven by enjoyment or interest), extrinsic (motivated by

external goals), and amotivation (lack of motivation due to perceived incompetence or control). Intrinsic motivation is autotelic, while extrinsic motivation can be either self-determined or non-self-determined, involving external pressure. This paper will apply the intrinsic-extrinsic framework and self-determination theory to analyse the travel motivations of Hanfu-wearing tourists engaging in cultural heritage tourism. However, the framework and theory still have limitations, particularly when applied to cultural heritage tourism like Hanfu costume tourism, where intrinsic and extrinsic motivations can be intertwined. Tourist motivations are multifaceted and dynamic, often stemming from multiple influences rather than a single factor (Sharples, 2006; Page & Connell, 2009). To address this, this paper introduces a new category—mixed motivation—alongside amotivation within the intrinsic-extrinsic framework, offering a more comprehensive understanding of the motivations behind Hanfu tourism. It will focus on intrinsic, extrinsic, and mixed motivations to better capture the complexity of Hanfu costume tourism.

3. Methodology

The data and information relevant to the paper were gathered through an online questionnaire with 476 adult tourists from 5 November to 11 November, 2024, who have Hanfu costume tourism experiences. The questionnaire was developed by the authors and administered through the Chinese online survey platform ‘WenJuanXing’. It comprised 25 questions structured into four sections. The first section included a single question aimed at assessing the frequency of participants’ Hanfu costume tourism. The second section contained eight questions designed to explore the motivations behind participants’ choice to travel in Hanfu. The third section also consisted of eight questions, focusing on participants’ experiences and perceptions of traveling in Hanfu. The final section included eight questions collecting demographic information, such as gender and age group. The questionnaire examines tourists’ motivations and on-site experiences by seven-point Likert scale, where a score of 7 represents the strongest alignment with a participant’s motivations and on-site experiences, and a score of 1 represents the least. The questionnaire data will be also translated from Chinese to English in this paper and presented by textual descriptions and tables in order to clearly illustrate the numbers and proportions of participants that chose each option in each question. Cross-over analysis will be also employed to see the connections between tourists’ travel motivations and on-site activities of dressing in Hanfu to visit tourism destinations.

4. Results

4.1 Participants Profile

Table 1: Participant profile of the questionnaire

Demographic variables	Levels	Frequencies	Percentages (%)
Gender	Female	311	65.34%
	Male	165	34.66%
Age	18-25	58	12.18%
	26-35	288	60.5%
	36-45	106	22.27%
	46-55	21	4.41%
	Above 56	3	0.63%
Occupation	Performer, anchor, Hanfu industry practitioner	9	1.89%
	Party and governmental staff	7	1.47%
	Researchers of institutes and universities	19	3.99%
	Enterprise managers, technicians, administrative and logistical personnel	318	66.81%
	Enterprise sales staff	46	9.66%
	Full-time housewife/husband	2	0.42%
	Service personal, workers, farmers and other manual laborer	15	3.15%
	Freelancers and self-employed people	32	6.72%
	Student	25	5.25%
	Retired	0	0.00%
	Others	3	0.63%
	Others	3	0.63%
Educational Background	Junior high school and below	5	1.05%
	High school	43	9.03%
	College	393	82.56%
	Undergraduate	32	6.72%
Travel Companion	Graduate and above	14	2.94%
	With family	115	24.16%
	With fellow tourists	275	57.77%
	With friends	40	8.4%
	With classmates and colleagues	31	6.51%
	Alone	1	0.21%
	Others		

The majority of participants who choose to wear Hanfu at tourism destinations are female, comprising 65.34% of the total. Most participants (60.5%) are young adults aged 26 to 35 and have achieved a higher level of education; 82.56% hold an undergraduate degree, and 6.72% have completed graduate or advanced studies. A significant portion, 66.81%, work in fields like enterprise management, technical roles, and administrative or logistical positions. Additionally, 57.77% of participants frequently prefer to wear Hanfu when traveling with friends, indicating that social interactions play an important role in this cultural practice (see Table 1).

4.2 Tourists' Travel Motivations

The intrinsic motivation factors displayed in the questionnaire include 'Dressing in Hanfu give me the feeling of travelling back the past', 'Dressing in Hanfu can make travelling more ceremonial', and 'I want to try different cultural experiences to enrich my life and experience through dressing in Hanfu'. The extrinsic motivation factors include 'It's inspiring to see beautiful photos or videos of other people dressing in Hanfu online and on social media', 'Hanfu is highly compatible with the history and cultural atmosphere of the destination', and 'I know that many people dress in Hanfu to visit the destinations, my choice of clothes is influenced by others' dress code'. The mix motivations which cover both intrinsic and extrinsic factors include 'I want to experience dressing differently from everyday life and show a different kind of beauty' and 'Hanfu is an important symbol of Chinese civilisation'.

Results show that the average scores for each motivation option exceed 5, above the neutral midpoint of 4, indicating that all motivations are meaningful for participants (see Table 2). Mean values were measured based on a seven-point Likert scales, where '1' refers to 'strongly disagree' and '7' refers to 'strongly agree'. As Table 2 shows that the highest average score, 6.17, is for 'Hanfu as a symbol of Chinese civilization,' highlighting cultural heritage as a primary motivator. This suggests that Hanfu is more than a fashion choice; it embodies cultural pride and identity. The second-highest score, 6.04, relates to 'Hanfu's compatibility with the destination's historical and cultural context', indicating that tourists value Hanfu's cultural resonance, especially at heritage sites (Yan, 2023).

Table 2: Results of each option regarding tourists' travel motivations

Options	1	2	3	4	5	6	7	Means
Dressing in Hanfu give me the feeling of travelling back the past.	2(0.42%)	5(1.05%)	22(4.62%)	55(11.55%)	121(25.42%)	167(35.08%)	104(21.85%)	5.53
Dressing in Hanfu can make travelling more ceremonial.	2(0.42%)	2(0.42%)	5(1.05%)	40(8.4%)	91(19.12%)	197(41.39%)	139(29.2%)	5.86
I want to try different cultural experiences to enrich my life and experience through dressing in Hanfu.	0(0%)	3(0.63%)	8(1.68%)	26(5.46%)	106(22.27%)	196(41.18%)	137(28.78%)	5.88
It's inspiring to see beautiful photos or videos of other people dressing in Hanfu online and on social media.	0(0%)	4(0.84%)	7(1.47%)	33(6.93%)	117(24.58%)	179(37.61%)	136(28.57%)	5.82
Hanfu is highly compatible with the history and cultural atmosphere of the destination.	1(0.21%)	2(0.42%)	6(1.26%)	22(4.62%)	97(20.38%)	166(34.87%)	182(38.24%)	6.02
I know that many people dress in Hanfu to visit the destinations, my choice of clothes is influenced by others' dress code.	0(0%)	6(1.26%)	14(2.94%)	47(9.87%)	143(30.04%)	177(37.18%)	89(18.7%)	5.55
I want to experience dressing differently from everyday life and show a different kind of beauty.	0(0%)	1(0.21%)	4(0.84%)	26(5.46%)	128(26.89%)	194(40.76%)	123(25.84%)	5.85
Hanfu is an important symbol of Chinese civilization.	0(0%)	2(0.42%)	3(0.63%)	23(4.83%)	73(15.34%)	156(32.77%)	219(46.01%)	6.17
Total	5(0.13%)	25(0.66%)	69(1.81%)	272(7.14%)	876(23%)	1432(37.61%)	1129(29.65%)	5.84

The lack of any 'strongly disagree' (score of 1) responses and the preference for scores of 5, 6, or 7 across most items further illustrates the alignment between these motivations and tourists' decisions to dress in Hanfu. Additionally, considering the top three options with highest mean scores include intrinsic, extrinsic, and mixed motivation categories, it follows that motivations are multifaceted. Tourists are driven by a combination of internal interests, social influences, and cultural pride, consistent with research suggesting that motivations for cultural tourism are often diverse and complex (Chiang et al., 2015). This supports the idea that motivations for cultural practices in tourism are seldom single-faceted, aligning with theories of multi-dimensional travel motivations (Crompton, 1979; Chiang et al., 2015).

4.3 Tourists' on-site Experiences

The questionnaire investigating tourists' on-site experiences includes eight response options, each reflecting a different aspect of behavior or feeling and rated on a seven-point Likert scale. Participants ranked these options according to personal experience, with a score of 7 representing the most reflective action or feeling and a score of 1 the least reflective. The results, shown in Table 3, reveal that mean scores for each option exceed 5, above the neutral median of 4, with over 45% of participants rating each option at 6 or 7. Some options reach over 70%, demonstrating a strong correlation between participants' experiences and the presented questionnaire options.

Table 3: Results of each option regarding tourists' on-site activities

Options	1	2	3	4	5	6	7	Means
Dressing in Hanfu allowed me to temporarily detach myself from the real world and escape from the worries of life.	9(1.89%)	15(3.15%)	26(5.46%)	72(15.13%)	133(27.94%)	142(29.83%)	79(16.6%)	5.2
Dressing in Hanfu enhanced the completeness of my journey and added greater significance to the travel experience.	1(0.21%)	1(0.21%)	6(1.26%)	27(5.67%)	109(22.9%)	203(42.65%)	129(27.1%)	5.87
Dressing in Hanfu to visit tourism destinations allowed me to experience the charm of traditional Chinese culture.	0(0%)	1(0.21%)	1(0.21%)	19(3.99%)	72(15.13%)	179(37.61%)	204(42.86%)	6.18
Photos and videos taken on Hanfu costume tourism received more feedback from friends and more reactions on social media.	0(0%)	2(0.42%)	10(2.1%)	53(11.13%)	135(28.36%)	160(33.61%)	116(24.37%)	5.66
Dressing in Hanfu made me more immersed in the historical and cultural atmosphere of the destinations and learned about the local history and culture	0(0%)	1(0.21%)	14(2.94%)	35(7.35%)	116(24.37%)	186(39.08%)	124(26.05%)	5.77
Dressing in Hanfu allowed me to be more integrated into a group of Hanfu enthusiasts or fellow tourists.	1(0.21%)	3(0.63%)	13(2.73%)	33(6.93%)	134(28.15%)	193(40.55%)	99(20.8%)	5.67
Dressing in Hanfu to visit tourism destinations gave me a different sense of beauty from the clothes I wear in everyday life	0(0%)	0(0%)	3(0.63%)	10(2.1%)	142(29.83%)	188(39.5%)	133(27.94%)	5.92
Dressing in Hanfu to visit tourism destinations made me feel the pride of being a Chinese.	0(0%)	2(0.42%)	9(1.89%)	24(5.04%)	100(21.01%)	152(31.93%)	189(39.71%)	6.01
Total	11(0.29%)	25(0.66%)	82(2.15%)	273(7.17%)	941(24.71%)	1403(36.84%)	1073(28.18%)	5.79

The top three options, based on mean scores, are 'Dressing in Hanfu allowed me to experience the charm of traditional Chinese culture' (6.18), 'Dressing in Hanfu made me feel pride in being Chinese' (6.01), and 'Dressing in Hanfu gave me a unique sense of beauty compared to everyday clothing' (5.92). These responses suggest that participants feel a strong connection to Chinese heritage, along with cultural pride and appreciation for the distinct aesthetics of Hanfu (Zong, 2023; Zhong et al., 2023). National traditional attire can deepen cultural identity and foster a sense of belonging, especially at heritage sites (Fan & Ip, 2023). This highlights how Hanfu serves not only as a link to history but also as an expression of cultural pride and individuality. Dressing in Hanfu transforms a typical tourism activity into an immersive heritage experience, allowing tourists to symbolically connect with their heritage (Chen, 2022; Zhou & Zhu, 2024). The aesthetic appeal of Hanfu enhances tourists' experiences at historic sites, creating a sense of harmony between the costume and the cultural environment (Zhong et al., 2023).

5. Discussions

While the participants in this research may not represent all tourists who wear Hanfu to visit cultural destinations, their perspectives offer valuable insights into the appeal of Hanfu costume tourism and its impacts. This study's contributions are categorised into three key areas.

First, Hanfu enriches cultural heritage tourism by enhancing tourists' appreciation of traditional Chinese culture and fulfilling their quest for unique, aesthetically significant experiences. Cultural heritage tourism enables visitors to connect with history and engage meaningfully with cultural traditions (Timothy & Boyd, 2003). Traditional costume like Hanfu provides a deeper cultural immersion, fostering understanding and meeting tourists' desires for distinctive experiences that diverge from everyday life (Cohen, 1979; Chhabra, 2010). As a garment with thousands of years of history, Hanfu embodies values and aesthetics from various dynasties, offering a tangible link to China's heritage. Donning Hanfu not only immerses tourists in Chinese tradition but also strengthens their emotional connection to history (Yan, 2023). Unlike viewing artifacts in a museum, wearing Hanfu at heritage sites allows tourists to actively participate in the cultural experience, aligning with Urry's (1990) concept of the 'tourist gaze', which gains depth through active involvement. This participatory approach provides a more intimate encounter with culture, allowing tourists to embody ancient Chinese aesthetics briefly. Additionally, Hanfu offers an aesthetic escape from modern fashion trends, reintroducing the distinctive, ornamental beauty of traditional costume (Zong, 2023; Zhong et al., 2023). According to Pine and Gilmore's (1998) 'experience economy' model, today's consumers value experiences that are memorable and emotionally resonant. Hanfu satisfies this by allowing tourists to adopt a different cultural identity temporarily. This trend mirrors other cultural practices, such as wearing kimonos in Japan's cultural districts, which similarly deepens cultural engagement and offers aesthetic escapism (Farsani & Jamshidi, 2021).

Second, social media significantly influences Hanfu costume tourism by motivating tourists to visit specific destinations, dress in Hanfu, and share their experiences online. Platforms like Little Red Book accelerate the spread of Hanfu culture by showcasing people in traditional costume at historical sites, acting as tools that

promote cultural heritage while shaping travel behavior (Zeng & Gerritsen, 2014). Social media functions as both an informational source and a motivator, shaping tourists' intentions by enabling them to imagine similar experiences (Dwityas & Briandana, 2017). In the context of Hanfu costume tourism, social media supports a collective identity among Chinese heritage enthusiasts. The Hanfu movement aligns with a broader trend that emphasises Chinese culture and identity, gaining momentum through social media communities. Enthusiasts gather online to share experiences, offer travel advice, and discuss the cultural significance of traditional costume, creating a space where cultural pride and heritage can be shared. This online community fosters a sense of belonging that further motivates Hanfu tourism participation, reinforcing cultural identity and connecting like-minded individuals. Social media's interactive nature also enhances its impact on travel decisions; comments, likes, and shares provide validation and encouragement, which reinforces the intention to participate. Instant feedback on shared photos and videos fosters a sense of accomplishment, positively influencing travel intentions (Dwityas & Briandana, 2017). Such the post-sharing gratification creates a feedback loop that sustains interest in Hanfu costume tourism.

Third, the growing popularity of Hanfu costume tourism among Chinese tourists reflects a strong cultural identity and a desire for meaningful, ritualistic experiences. Hanfu, the traditional clothing of the Han Chinese, is not merely a fashion choice; it symbolises cultural heritage and historical continuity. Amid rapid modernisation and globalisation, a group of Chinese tourists, particularly younger generations, are reconnecting with their roots. This resurgence is part of a broader movement to preserve and celebrate traditional Chinese culture, resisting the pressures of modernisation (Huang, 2023). The revival of Hanfu reflects a nationalistic desire to assert cultural pride in a globally uniform world, symbolising a stronger connection to historical traditions. In tourism context, dressing in Hanfu represents an embodied practice of cultural engagement. Tourists dress in Hanfu as part of an immersive experience to reconnect with their heritage, viewing it as more than a visual novelty. This ritualistic engagement with the past offers emotional and symbolic significance, allowing tourists to participate actively in the traditions of their ancestors (Zhou & Zhu, 2024). By embodying the past, tourists reinforce their collective memory and identity through a form of cultural reenactment. The rise of Hanfu costume tourism aligns with a broader trend in China toward cultural tourism. As tourists increasingly seek personalized and meaningful experiences, they are drawn to activities that offer deeper engagement with their heritage (Cui & Song, 2024). Hanfu costume tourism exemplifies experiential tourism, emphasizing interactive and participatory activities over traditional sightseeing (Zhou et al., 2019; Zhong et al., 2024). By dressing in traditional costume, tourists not only learn about the past but also experience it in an interactive way. This shift toward experiential travel reflects a growing desire for authenticity and emotional resonance in tourism, as travelers seek more than just sightseeing—they aim for a personal, cultural connection.

6. Conclusion

This study examined Hanfu costume tourism in China, highlighting its cultural, aesthetic, and social motivations. By analysing survey data, the findings reveal how Hanfu costume tourism allows participants to connect with Chinese heritage, blend tradition with personal style, and reinforce collective cultural identity. This research shows how dressing in Hanfu enables tourists to form an emotional link with China's history and aesthetic legacy.

The study contributes to cultural heritage tourism in three ways. First, it shows how dressing in Hanfu at historical sites boosts cultural authenticity and emotional engagement, turning passive observation into an immersive celebration of history. This aligns with experiential tourism theories, suggesting that sensory involvement deepens the tourism experience. Second, the study highlights social media's role in promoting Hanfu costume tourism. Social media spreads Hanfu culture and fosters community among enthusiasts by displaying travelers' experiences, reinforcing identity-based motivations and social trends in cultural tourism. Finally, the study sheds light on contemporary cultural identity expressions in modern China. Hanfu costume tourism's popularity reflects a movement among younger generations to reconnect with tradition amid globalization, expressing a reimagined cultural identity that honors heritage. This trend suggests a commitment to preserving Chinese culture and opens avenues for future research on Hanfu's social and economic impacts within tourism.

This study has two key limitations. First, it relies solely on self-reported data from an online survey, which can introduce response bias, as participants may present socially desirable answers or omit certain details. Second, the study is limited by its focus on Hanfu costume tourism in China, which may restrict the generalisability of the findings to other cultural or geographical contexts. Future research could address these limitations by employing a mixed-methods approach, combining quantitative surveys with qualitative interviews or observational studies to capture more accurate and comprehensive insights. Additionally, expanding the scope of the study to include

cross-cultural comparisons could provide valuable insights into how motivations for wearing traditional costumes vary across different countries or regions. Further exploration of the influence of social media on tourists' decision-making and experiences could also deepen our understanding of its role in shaping cultural tourism trends. Longitudinal studies could help track how tourists' motivations for engaging in Hanfu costume tourism evolve over time, providing a more nuanced understanding of the long-term impact of such experiences on cultural heritage engagement.

References

- Bonetti, E., Simoni, M.D., & Cercola, R. (2014) 'Creative Tourism and Cultural Heritage: A New Perspective' in Lucia Aiello (eds), *Handbook of Research on Management of Cultural Products: E-Relationship Marketing and Accessibility Perspectives*, Pennsylvania: IGI Global, pp. 367–395.
- Chen, X. (2022) 'Inheritance and Innovation of Hanfu Culture from the Development Significance of Hanfu', *Chemical Fibre and Textile Technology*, Vol. 12, pp. 176–178.
- Chhabra, D. (2010) 'Back to the Past: A Sub-segment of Generation Y's Perceptions of Authenticity', *Journal of Travel Research*, Vol. 44, pp. 64–273.
- Chiang, Y., Yang, X., & Wang, J. (2015) 'Understanding Cultural Motivations in Tourism: A Cross-cultural Approach', *International Journal of Cultural Tourism*, Vol. 6, No. 2, pp. 213–225.
- Cohen, E. (1979) 'A Phenomenology of Tourist Experiences', *Sociology*, Vol. 3, pp. 179–201.
- Crompton, J.L. (1979) 'An Assessment of the Image of Mexico as a Vacation Destination and the Influence of Geographical Location Upon That Image', *Journal of Travel Research*, Vol. 17, No. 4, pp. 18–23.
- Crouch, D., Jackson, R., & Thompson, F. (2005) 'Introduction' in David Crouch, Rhona Jackson, Felix Thompson (eds), *The Media and the Tourist Imagination: Converging Cultures*, 2005, London: Routledge, pp. 1–14.
- Cui, X., & Song, Z. (2024) 'Cultural Heritage Tourism at Film-related Tourism Sites: Staged and Existential Authenticity at Hengdian World Studios', *Journal of Heritage Tourism*, Vol. 19, No. 4, pp. 559–576.
- Dann, G.M.S. (1981) 'Tourist Motivation: An Appraisal', *Annals of Tourism Research*, Vol.8, No. 2, pp. 187–219.
- Dodds, R., Pitts, R.E., & Smith, W.W. (2016) 'Willingness to Pay for Environmentally Linked Clothing at an Event: Visibility, Environmental Certification, and Level of Environmental Concern', *Tourism Recreation Research*, Vol. 41, No. 3, pp. 283–290.
- Dwityas, N.A., & Briandana, R. (2017) 'Social Media in Travel Decision Making Process', *International Journal of Humanities and Social Science*, Vol.7, No. 7, pp. 193–201.
- Fan, C., & Ip, P.T.T. (2023) 'When Showing Hanfu to Foreigners, I Feel Very Proud': The Imagined Community and Affective Economies of Hanfu (Chinese Traditional Couture) Among Chinese Migrant Youth in the United Kingdom', *European Journal of Cultural Studies*, Vol.26, No. 6, pp. 781–802.
- Farsani, N.T., & Jamshidi, H.M. (2021) 'An Investigation of the Positive Impacts of Traditional Fashion Tourism', *Journal of Policy Research in Tourism, Leisure and Events*, Vol. 13, No. 3, pp. 298–313.
- Hansen, K.T. (2004) 'The World in Dress: Anthropological Perspectives on Clothing, Fashion, and Culture', *Annual Review of Anthropology*, Vol. 33, No. 1, pp. 369–392.
- Hargrove, C.M. (2012) 'Heritage Tourism', in Seba, J. (Ed.), *Tourism and Hospitality: Issues and Developments*, pp. 126–129, Apple Academic Press.
- Huang, X. (2023) 'Research on the Embodied Experience of Hanfu Tourism Based on Network Text Analysis', *Journal of Wuxi College of Commerce and Vocational Technology*, Vol. 23, No. 06, pp. 60–66.
- Leitao, R., Maguire, M., Turner, S., & Guimaraes, L. (2022) 'A Systematic Evaluation of Game Elements Effects on Students' Motivation', *Education and Information Technologies*, Vol. 27, No. 1, pp. 1081–1103.
- Lee, K.-Y., & Lee, H. (2019) 'Traditional Costume Experience at a Cultural Heritage Festival', *Tourism Management Perspectives*, Vol. 32, 100555.
- Liu, Y., & Wang, Hui. (2022) 'Study on the Development of Tourist Attractions Assisted by Hanfu Culture under the Background of Rural Revitalization—Taking Liuzhou Yaobu Ancient Town as an Example', *Intelligent Agriculture Journal*, Vol. 2, No. 02, pp. 92–94.
- MacCannell, D. (1973) *The Tourist: A New Theory of the Leisure Class*, New York: Schocken Books.
- Mansfeld, Y. (1992) 'From Motivation to Actual Tourism', *Annals of Tourism Research*, Vol. 19, No. 3, pp. 399–419.
- McKercher, B., & du Cros, H. (2002) *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, Haworth Hospitality Press.
- Mokhtarian, P.L., Salomon, I., & Singer, M.E. (2015) 'What Moves Us? An Interdisciplinary Exploration of Reasons for Traveling', *Transport Reviews*, Vol. 35, No. 3, pp. 250–274.
- Page, S., & Connell, J. (2009) *Tourism: A Modern Synthesis*, Andover, MA: South-Western Cengage Learning.
- Pearce, P.L. (1988) *The Ulysses Factor: Evaluating Visitors in Tourist Settings*, Springer-Verlag Publishing.
- Pearce, P.L., & Lee, U.-I. (2005) 'Developing the Travel Career Approach to Tourist Motivation', *Journal of Travel Research*, Vol. 43, No. 3, pp. 226–237.
- Pine, B.J., & Gilmore, J.H. (1998) 'Welcome to the Experience Economy', *Harvard Business Review*, Vol. 76, pp. 97–105.
- Poria, Y., Butler, R., & Airey, D. (2003) 'The Core of Heritage Tourism', *Annals of Tourism Research*, Vol. 30, No. 1, pp. 238–254.

- Richards, G. (2003) 'What is Cultural Tourism?', in van Maaren, A. (ed.), *Erfgoed voor Toerisme*, Weesp: Nationaal Contact Monumenten.
- Richards, G. (2018) 'Cultural Tourism: A Review of Recent Research and Trends', *Journal of Hospitality and Tourism Management*, Vol. 36, pp. 12–21.
- Sharpley, R. (2006) *Travel and Tourism*, London: Sage.
- Singh, P., & Najar, A. (2020) 'Regional Food as the Catalyst for Cultural Tourism in India', in Maximiliano Emanuel Korstanje, Babu George & Nedelea Alexandru-Mircea (eds), *Strategies for Promoting Sustainable Hospitality and Tourism Services*, 2020, Pennsylvania: IGI Global, pp. 84–96.
- Timothy, D.J., & Boyd, S.W. (2003) *Heritage Tourism*, Harlow: Prentice Hall.
- Smith, L. (2006) *Use of Heritage*, London: Routledge
- Urry, J. (1990) *The Tourist Gaze : Leisure and Travel in Contemporary Societies*. London: Sage Publications.
- Wang, T. (2013) 'An Introduction to Hanfu and its Cultural Characteristics', *Lantai World*, Vol. 16, pp. 85–86.
- Yin, J. (2021) 'A Novel Expression of Traditional Culture: Hanbok, Hanbok Movement and its Cultural Revival', *YiShuBaiJia*, Vol. 6, pp. 181–185.
- Yan, J. (2023) 'Modern Ancient Chinese: A Discursive Construction of Hanfu Identity Across Spatiotemporal Scales', *Language, Culture and Society*, Vol. 5, No. 2, pp. 246–268.
- Zeng, B., & Gerritsen, R. (2014) 'What do we know about social media in tourism? A review', *Tourism Management Perspectives*, Vol. 10, pp. 27–36,
- Zhou, X., Yang, N., & Zhang, M. (2019) "From 'Hanfu' to 'Huafu': The construction and demand of 'national costume' by contemporary Chinese", *Journal of Guizhou University (Art Edition)*, Vol. 5, pp. 46–55.
- Zhong, L., Yang, L., Morrison, A. M., Zhu, M., Nguyen, H., & Lang, W. (2023) 'Who wears Hanfu clothing when they travel? Experience-based cultural tourism market segmentation – the case of Xi'an, China', *Current Issues in Tourism*, Vol. 27, No. 5, pp. 805–818.
- Zhou, Y., & Zhu, H. (2024) 'Perspectives on the "Hanbok Wave": Value Recycling of Chinese Cultural Products under the Perspective of Symbolic Consumption', *Xuehai*, Vol. 03, pp. 143–149.
- Zong, Y. (2023) 'Towards Hanfu Tourism: Exploring the Travel Motivation and Experience of Hanfu Tourists' in Chen, J.S. (Ed.) *Advances in Hospitality and Leisure (Advances in Hospitality and Leisure, Vol. 18)*, 2023, Emerald Publishing Limited, Leeds, pp. 37–56.

The Evolution of Tourism in COVID Times: A Case Study¹

Annunziata de Felice¹ and Angelamaria De Feo²

¹Department of Law, University of Bari Aldo Moro, Italy

²Department of Psychology and Educational Sciences, Telematic University Pegaso, Italy

annunziata.defelice@uniba.it

angelamaria.defeo@unipegaso.it

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%.

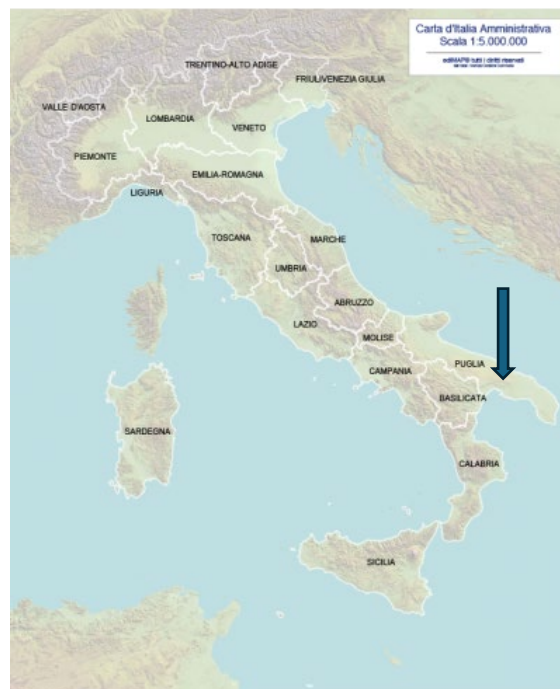
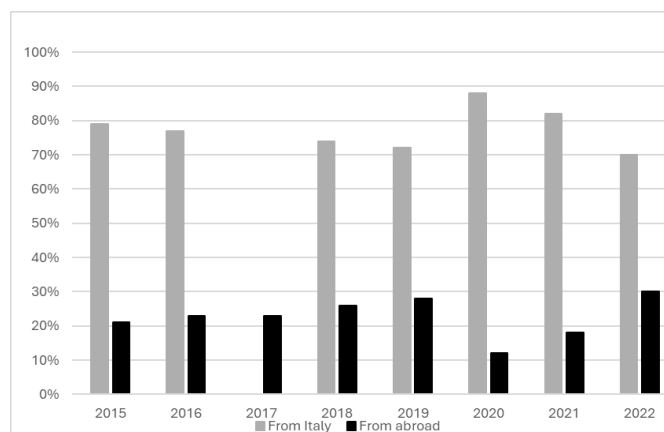


Figure 1: Italy and Apulia

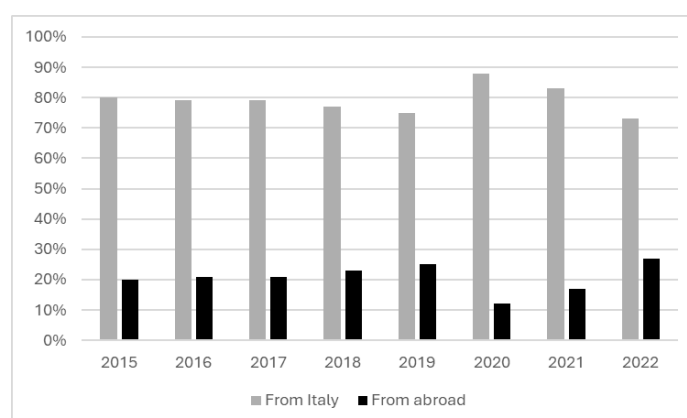


Source: Puglia Promotion Observatory, February 2023

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.

Disclosure statement: No potential conflict of interest was reported by the authors.

References

- Aina, C., Brunetti, I., Mussida, C., Scicchitano, S., 2023. Distributional effects of COVID-19. *Eurasian Business Review*, 13, pp.221–256.
- Angeloni, S., 2021. L'impatto del Covid-19 sul turismo in Italia: passato, presente e futuro. *Impresa Progetto*, 1, pp.1-23.
- Badia, F. and Ruggiero E., 2019. Opportunità e potenzialità del turismo industriale: il progetto "Make it in Puglia", Albania. In *1st Unicart Interdisciplinary International Conference on Tourism Management and Development of Territory*. Albania, International Academic Research Center, pp. 105-114.
- Baldazzi, B., Morricone, M., Talucci, V. and Ungaro, P., 2016. L'impatto turistico nelle regioni italiane: un indicatore composito di attrattività e sostenibilità turistica, In: Mazzola F, Nisticò R (eds) *Le regioni europee. Politiche per la coesione e strategie per la competitività*. Milano, Franco Angeli, pp 234-301.
- Banca d'Italia, 2021. Relazione annuale, 31 maggio, Roma.
- Bowen, D. and Clarke, J., 2009. *Contemporary tourist behaviour: Yourself and others as tourists*. Oxford, Oxford University Press.
- Calabrò, A., 2009. *Orgoglio industriale – la scommessa italiana contro la crisi globale*. Milano, Mondadori.
- Caruso, S., 2012. Homo oeconomicus: nascita, passione e morte. In: *XII Convegno Associazione Italiana per la Storia del Pensiero economico*, 21-23 febbraio, Università di Firenze.
- Cattani, G., Guidetti, G. & Pedrini, G., 2021. Work flexibility and workplace training in Italy before and after the Jobs Act Reform. *Review of Economics and Institutions*, 12 (1), pp.1-27
- Centro Studi Touring Club Italiano, 2020. *Le vacanze estive degli italiani 2020*. Osservatorio vacanze. Milano, TCI.
- Cheng, K. W. K., 2009. The effect of web-based collaborative learning methods to the accounting courses in technical education. *College Student Journal*, 43(3) pp.755–765.
- Ciccarelli, A., Scarsella, E. and Braga, A., 2017. In viaggio con un click, Nuovi strumenti di marketing digitale per il settore turistico 20.12.2024. Available at: <https://elearning.unite.it/pluginfile.php/178822/mod_resource/content/1/Ciccarelli_Scarsella_Big%20Data.pdf>

- European Commission (2016), *The European Tourism Indicator System. ETIS Toolkit for Sustainable Destination Management*. Bruxelles, European Commission.
- Franco, C. and Landini, F., 2022. Organizational drivers of innovation: The role of workforce agility. *Research Policy*, 51(2). DOI:10.1016/j.respol.2021.104423
- Gattullo M., 2019. Le stazioni abbandonate in Puglia: Da luoghi marginali a nuove tessere del mosaico turistico? In: S. Cerutti and M. Tadini, eds. *Mosaico/Mosaic*, Società di studi geografici. Memorie geografiche NS 17 pp.693-701.
- Johnson, R. T. and Johnson, D. W., 1994. An overview of cooperative learning. In: J. S. Thousand, R. A. Villa and A. I. Nevin, eds. *Creativity and collaborative learning: A practical guide to empowering students and teachers*. Baltimore, MD: Paul Brookes Publishing. pp.31-44.
- Hosany S., Ekinci Y. and Uysal, M., 2006. Destination image and destination personality: an application of branding theories to tourism places. *Journal of Business Research*, 59(5) pp.638-642.
- Martins, P.S., 2021. Employee training and firm performance: Evidence from ESF grant applications, OECD Productivity WP, 2021-23. Paris: OECD Publishing.
- Maslow, A.H., 1943. A theory of human motivation. *Psychological Review*, 50, pp.370-396.
- Mohsin A., 2005. Tourist attitudes and destination marketing – the case of Australia’s Northern Territory and Malaysia. *Tourism Management*, 26, pp.723- 732.
- Mente Locale 20.12.2013. Available at: http://mobilita.regione.puglia.it/images/mentelocale/selezioni_stazioni_febbraio%202013.pdf
- Morellato, M., 2014. Digital competence in tourism education: Cooperative-experiential learning. *Journal of Teaching in Travel & Tourism*, 14(2), pp.184-209.
- Pine, B. J. and Gilmore, J. H., 2015. *L'economia delle esperienze*. Milano, Etas.
- Polillo, R., 2013. La didattica al tempo di twitter. Lecture conducted at Bicocca University of Milan, Italy.
- Ragone, G., 1998. Turismo. *Enciclopedia delle scienze sociali*. Roma, Istituto della Enciclopedia italiana Treccani. pp.675-683
- Regione Puglia, Agenzia regionale per la tecnologia e l’innovazione. 2023. Tasso di disoccupazione giovanile. Accessed 20.12.2024
- Available at: <https://apulianinnovationoverview.arti.puglia.it/indicatori/tasso-di-disoccupazione-giovanile>
- Salustri, A. and Cocco, V., 2022. Turismo locale e aree interne: un binomio possibile? *Memorie Geografiche*, 21, pp.79-87.
- Savelli, A., 2012. I percorsi della sociologia del turismo in Italia. *Rivista di Scienze del Turismo-Ambiente Cultura Diritto Economia*, 2(1) pp.5-43.
- Simon, H.A., 1957. *Models of man: Social and rational*. New York: John Wiley and Sons, Inc.
- The New York Times, 10.01.2019 “52 Places to go in 2019” Available at: <https://www.nytimes.com/interactive/2019/travel/places-to-visit.html>
- Veblen, T., 1899. *The theory of the leisure class*. New York, McMillan.

International Economic Relations and Sustainable Tourism: The Case of Greece

Georgios Deirmentzoglou¹, Eleni Anastasopoulou¹ and Eirini Vlassi^{1,2}

¹Department of Economics and Business, Neapolis University Pafos, Cyprus

²Department of Tourism Economics and Management, University of the Aegean, Greece

g.deirmentzoglou@nup.ac.cy

e.anastasopoulou.1@nup.ac.cy

e.vlassi.2@nup.ac.cy

Abstract: International economic relations are increasingly shaping the trajectory of global tourism, with profound implications for sustainability and environmental management. Economic partnerships, trade agreements, foreign investments, and technological innovations not only drive the development of tourism infrastructure but also influence sustainable practices through resource efficiency, environmental regulations, and cultural conservation. While these international dynamics can promote growth, they also pose risks of overtourism and environmental degradation if sustainability is not integrated into the core strategies of tourism development. The challenge lies in aligning economic growth with sustainable tourism practices, particularly in destinations heavily reliant on international tourism flows. This study examines the impact of international economic relations on sustainable tourism in Greece, with a specific focus on the Peloponnese region. By conducting in-depth interviews with policy-makers, the research explores how global economic interactions—such as trade policies, foreign direct investments, and tourism agreements—coupled with technological innovation, influence both the development and sustainability of the local tourism sector. Special attention is given to how cutting-edge technologies, such as digital platforms, data analytics, and smart tourism solutions, are leveraged to enhance environmental management and resource conservation. The study also addresses the opportunities and challenges faced by policy-makers in balancing economic development with environmental sustainability, providing key insights into the role of international cooperation and technology-driven solutions in promoting a sustainable future for tourism in Greece. The findings offer valuable policy recommendations for enhancing sustainable tourism practices in Greece and other regions navigating the complexities of global economic interdependence.

Keywords: Sustainable tourism; Foreign investment, Trade agreement, Digital tools, Technological innovation, overtourism, Greece

1. Introduction

Tourism is a significant contributor to global economic growth, frequently stimulating regional development, job creation, and cultural exchange (Aratuo and Etienne, 2019; Li et al., 2018). However, the accelerated expansion of the tourism industry has given rise to considerable environmental and sustainability challenges, particularly in destinations with high visitor volumes and constrained resources (Higgins-Desbiolles, 2020; Budeanu, et al., 2016). In recent years, the increasing interconnectivity of global economies has amplified the impact of international economic relations on local tourism sectors, making the pursuit of sustainable tourism both a priority and a challenge for policymakers and industry stakeholders.

The international economic landscape exerts a pivotal influence on the global tourism sector, impacting both its growth and sustainability (Gössling, 2002). Economic partnerships, trade agreements, and foreign investments drive the expansion and modernization of tourism infrastructure, while also impacting environmental management and resource conservation practices (Cohen, 2012; Azarya, 2004). These global dynamics have the potential to elevate tourism offerings and promote economic growth; however, they also present significant challenges. Without a focus on sustainability, increased tourism and investment can lead to overtourism, environmental degradation, and cultural loss (Dodds and Butler, 2019). As destinations around the world navigate these complexities, balancing economic growth with sustainable tourism practices has become a central challenge.

The primary question that arises is how international economic relations impact the sustainability of tourism. Therefore, this study in order to shed light on the relationship between international economic relations and sustainable tourism, focuses on Greece, a popular tourist destination with a diverse landscape, rich cultural heritage, and significant reliance on tourism revenues (Buhalis, 2001). By conducting in-depth interviews with policy-makers of the Peloponnese region, the research explores how global economic interactions—such as trade policies, foreign direct investments, and tourism agreements—coupled with technological innovation, influence both the development and sustainability of the local tourism sector.

2. Literature Review

In recent decades, the concept of sustainable development has assumed a prominent position within academic and business discourse (Deirmentzoglou et al., 2024a; Apostolopoulos et al., 2023; Pistikou 2023). The concept of sustainable tourism has become a fundamental tenet of responsible development in the global tourism industry, underscoring the necessity to achieve a balance between economic growth, environmental preservation, and social equity (Apostolopoulos et al., 2020; Lu and Nepal, 2009). In contrast to conventional tourism models that frequently prioritize immediate economic benefits, sustainable tourism endeavors to foster long-term advantages for both host communities and visitors. This is achieved by minimizing adverse environmental impacts, promoting cultural preservation, and bolstering local economies (Pan et al., 2018). As global tourism continues to expand, it presents both opportunities and challenges. While it contributes significantly to economic growth and job creation, it also poses risks of overtourism, environmental degradation, and cultural erosion if not managed properly (Dodds and Butler, 2019). The importance of sustainable tourism is further highlighted by its alignment with the United Nations Sustainable Development Goals (SDGs). By prioritizing responsible practices that conserve the environment, respect socio-cultural norms, foster economic resilience, and focus on shared values, sustainable tourism offers a viable path for developing tourism in a manner that not only meets the needs of the present but also ensures the continued availability and benefit of these resources for future generations (Apostolopoulos et al., 2024; Rasoolimanesh et al., 2023).

The relationship between international economic relations and sustainable tourism has been the subject of considerable scholarly attention, particularly in light of the ongoing impact of globalization and technological advances on the tourism sector. A number of studies have examined the influence of economic partnerships, trade agreements, and foreign direct investments on the development of sustainable tourism in a variety of regions (Sokhanvar, 2019; Saayman et al., 2016; Endo, 2006; Augustyn and Knowles, 2000). These economic interactions frequently result in significant infrastructure enhancements and financial resources being allocated to tourism-dependent destinations, thereby enabling them to expand their capacity and reach a global audience. However, researchers have also identified a number of environmental and social challenges associated with unregulated tourism growth, including resource depletion, habitat destruction, and community displacement (Dodds and Butler, 2019).

One area of significant research is the impact of foreign direct investment (FDI) on the development of tourism infrastructure. Foreign direct investment (FDI) plays a pivotal role in the construction of hotels, resorts, and transportation networks, which are indispensable for accommodating international tourists (Endo, 2006). The extant literature demonstrates that FDI can create employment opportunities and boost local economies. However, it can also contribute to environmental degradation and increased carbon emissions if sustainable practices are not integrated (Pratt, 2024; Dwyer, 2022). While foreign direct investment (FDI) can stimulate economic growth, it must be managed carefully to ensure that the benefits extend to local communities and align with sustainability goals.

Furthermore, trade agreements exert a considerable influence on the tourism industry, affecting cross-border travel, visa policies, and the movement of goods and services (Saayman et al., 2016). Bilateral and multilateral agreements frequently seek to facilitate tourist flows by reducing travel restrictions and promoting economic cooperation between countries. Research has demonstrated that such agreements can result in increased visitor numbers and greater revenue for tourism-dependent economies (Khalid et al., 2022). However, the influx of tourists associated with liberalized travel policies can strain local ecosystems and resources, underscoring the necessity for policies that balance tourism growth with environmental stewardship.

Technological innovation plays a significant role in many industries (Agoraki et al., 2024a; Agoraki et al., 2024b; Apostolopoulos et al., 2024; Kourkoumelis et al., 2024; Deirmentzoglou and Deirmentzoglou, 2022) has constituted a further critical factor in the intersection of economic relations and sustainable tourism (Deirmentzoglou et al., 2024b; Vlassi et al., 2023). The advent of digital platforms, data analytics, and smart tourism solutions has precipitated a profound transformation in the manner by which destinations oversee visitor traffic, promote their attractions, and assess environmental impact. Recent studies have underscored the potential of technology to enhance resource efficiency, curtail waste, and advance sustainable practices within the tourism industry (Buhalis & Amaranggana, 2015).

In the context of an increasingly interconnected global economy, international partnerships are a crucial means of promoting sustainable tourism practices. Collaborative endeavors between nations, international organizations, and private sector stakeholders facilitate the exchange of knowledge, resources, and

technologies that are indispensable for the development of sustainable tourism infrastructure and practices (Scheyvens and Cheer, 2022). By collaborating on policies and strategies that prioritize environmental conservation, cultural preservation, and socio-economic equity, countries can construct resilient tourism sectors that align with global sustainability goals. These partnerships not only assist in addressing the risks of overtourism and ecological degradation but also fortify the resilience of local communities, empowering them to manage tourism growth in a manner that respects both natural and cultural assets (Graci, 2020).

3. Methodology

This study examines the perspectives of policymakers, who bear the responsibility for the development and implementation of policies that support the tourism sector. The Peloponnese in southern Greece was selected for this research study due to its consistently rising tourism and investment levels in recent years. For 2022 the percentage of domestic and foreign tourists visiting the Peloponnese increased to 19%. A qualitative method based on the analysis of the views of five policy-makers from the regional government allows for an effective evaluation and explanation of the phenomenon in its specific context (Van Burg et al., 2020; Drakopoulou-Dodd et al., 2014). The technique employed was the purposive sampling technique, which refers to a collection of information-rich cases for in-depth study and comprises a relatively small sample size (Schmidt et al., 2020; Hussain et al., 2018; Kenny and Duckett, 2003). The participants in this study are policy-makers and were selected based on their relevance to the research topic and their role in the regional tourism development process (Amoatey et al., 2015).

Data were collected via telephone or online from policy-makers during 2024 through five in-depth, semi-structured interviews (Deakin and Wakefield 2014; Lo Iacono et al., 2016). This approach allowed for a comprehensive examination of subjective perspectives and facilitated an optimal exploration of international, social, and business issues (Wallace et al., 2019; Hassink et al. 2016). All ethical standards were adhered to safeguard the interests of both researchers and participants. The use of codes (R*) is employed to ensure the anonymity of the participants. The duration of the interviews was, on average, one hour, resulting in approximately five hours of recorded data. The data were subjected to content analysis (Bengtsson, 2016). Following the manual transcription, the initial codes were generated and subsequently organized into the research themes and sub-themes. Subsequently, an inductive approach was employed to examine the interviews individually (Thomas 2006) before creating a document that compares each other and summarises the key themes (Okoli, 2023; Clarke et al., 2015). Two themes were identified. The first one was the foreign investments and sustainable tourism related to investments and local assets, economic partnerships and trade agreements, energy and tax incentives and funding initiatives. The second theme was the technological advancements and sustainable tourism related to the utility of digital tools and the management of overtourism.

Table 1: Content Analysis

Theme	Sub-themes
Foreign investments and sustainable tourism	Investments and local assets Economic partnerships and trade agreements Energy and tax incentives Funding initiatives
Technological Advancements and sustainable tourism	Digital tools Managing overtourism

4. Findings

- **Foreign investments and sustainable tourism**

Investments and local assets

The development of sustainable tourism is contingent upon the establishment of favourable international economic relations, as these facilitate the attraction of investment, guarantee the provision of superior quality infrastructure and reinforce the local economy through collaboration with the global community.

Concurrently, they facilitate the exchange of knowledge, encourage innovation, and align with international sustainability standards.

As stated in Case **R2**:

'International economic relations facilitate the attraction of investment in sustainable tourism infrastructure, including energy-efficient hotels, the conservation of natural resources, and the development of alternative forms of tourism. International cooperation also provides expertise that enhances the sustainability and competitiveness of our tourism products.'

This also necessitates the assurance that the area in question meets the requisite international standards of attractiveness. As respondent **R4** indicates, *'this entails a clean environment, a distinctive cultural heritage, and a wealth of archaeological monuments.'*

Economic partnerships and trade agreements

Globally, as in Greece, economic partnerships and trade agreements play a pivotal role in influencing a country's tourism policies and practices. Such partnerships can serve as catalysts for promoting sustainability through investment, promoting the tourism product, and enhancing international visibility.

As stated in Case **R1**:

'...International partnerships serve to enhance the visibility of Greek destinations through the implementation of strategic marketing programs and events, such as tour operator conferences. This promotional strategy has the dual effect of increasing demand and attracting investors interested in sustainable tourism infrastructure.'

The formation of strategic partnerships with prominent real estate enterprises has the effect of attracting investment capital, which in turn facilitates the development of sustainable tourism infrastructure. This approach combines the conservation of the natural environment with the advancement of tourism. Concurrently, targeted initiatives that portray Greece as a premier destination have resulted in increasing tourist traffic.

In the case of **R2**, it is stated that:

'International partnerships facilitate the exchange of best practices, attract tourists from emerging markets such as India and USA, and establish a unified framework for sustainable practices. By establishing collaborative frameworks, the Ministry of Tourism is enhancing Greece's capacity to position itself as a sustainable tourism destination.'

As case **R5** indicates:

'Trade agreements enable Greece to implement sustainability policies that enhance its competitiveness, such as the use of renewable energy sources in tourist accommodation...'

Energy and tax incentives

It is imperative that Greece establishes an environment that is conducive to investment and environmentally sustainable. Concurrently, incentives must be established to encourage the integration of environmentally sustainable practices within the tourism industry. Nevertheless, the current development law constrains the potential for implementing targeted investment strategies. A modification of the public investment strategy is required, in conjunction with a reduction in energy costs, in order to facilitate investments with multiplier benefits. In lieu of direct subsidies, it is recommended that robust tax incentives be implemented to stimulate significant capital investment.

As stated in the case **R1**:

'It is recommended that foreign investment in the tourism sector be directed through national frameworks that promote sustainability, such as the adoption of a circular economy. It is imperative to prioritize initiatives such as recycling, waste management, and the utilization of renewable energy sources, while providing tax incentives for green investments to bolster their viability.'

As stated in the case R3:

'It is imperative that Greece implement strategies to attract substantial investments in the tourism sector, with a particular focus on reducing energy costs and introducing tax incentives in lieu of subsidies...'

Funding initiatives

Funded initiatives to support sustainable tourism represent a significant catalyst for growth, offering invaluable opportunities to promote tourism and enhance competitiveness. These initiatives provide support for actions that focus on both international visibility and the strengthening of sustainability practices within the tourism business sector.

As indicated in the case study R4:

'Key initiatives include the funded participation of tourism enterprises in international exhibitions and conferences, where they present their services and develop partnerships. Concurrently, programs such as the NSRF provide support for investments in green infrastructure, including energy-efficient accommodation and waste management systems, which are aligned with sustainability objectives.'

As indicated in the case R5:

'...Initiatives that involve business participation in global tourism events are supported with funding from state and regional bodies.'

- **Technological advancements and sustainable tourism**

Digital tools

Technological developments are an indispensable component of sustainable tourism, offering instruments that facilitate efficiency, diminish the environmental impact, and attract a greater number of visitors. The application of artificial intelligence (AI), digital platforms, and data analytics can enhance the competitiveness, appeal, and environmental sustainability of tourism destinations.

In the case R2, it was stated that:

'Technologies such as artificial intelligence facilitate the optimization of marketing strategies and reduce the costs associated with advertising, thereby enhancing the appeal of the destination and increasing its economic viability...'

As stated in the case R4:

'...Through the implementation of prediction algorithms, tourism businesses are able to effectively manage demand, thereby improving resource management and the visitor experience.'

As stated in the case R5:

'Technological solutions, including smart data networks and AI applications, facilitate the comprehension of tourism demand and the administration of natural and human resources. Concurrently, the implementation of renewable energy systems and intelligent tourism applications serves to enhance sustainability and curtail the environmental impact of tourism industry.'

Managing overtourism

As a prominent tourist destination, Greece is confronted with the challenge of managing the adverse effects of overtourism on the sustainability and quality of life of some local communities. Concurrently, international economic relations are of paramount importance in the formulation of strategies for the sustainable development of the tourism sector.

As previously stated in the case R1:

'It would be prudent for Greece to leverage technological solutions to address the issue of overtourism. This could entail the implementation of intelligent visitor management applications and reservation systems in popular tourist destinations. The analysis of data provides forecasts of the demand for tourism, thus enabling the implementation of timely measures to alleviate congestion in specific areas. By forging international partnerships, Greece can gain access to cutting-edge technologies and apply

successful management models from other countries, thereby mitigating the adverse effects of overtourism and advancing sustainability.'

As stated in the case **R3**:

'Greece addresses the issue of overtourism by implementing strategies such as regulating the influx of tourists in areas that are already saturated and promoting lesser-known destinations. Concurrently, it employs international economic relations to cultivate thematic forms of tourism, including cultural and agritourism, which more equitably disperse visitors and mitigate the strain on well-frequented locations.'

5. Discussion and Conclusion

The concept of sustainable tourism illustrates the necessity for a robust equilibrium between economic growth, environmental conservation, and social equity (Lu & Nepal, 2009). This research contributes to the existing literature by examining the impact of international economic relations on the development and sustainability of tourism in Greece. To conduct the research, semi-structured interviews were conducted with policymakers responsible for the tourism sector of a large region of Greece, the Peloponnese. It is crucial to recognize the significance of international partnerships and policies that integrate sustainability principles (Deirmentzoglou et al., 2024c). The extant literature on the impact of economic partnerships, trade agreements, and foreign direct investment indicates that these have a positive effect on the economy and facilitate the development of sustainable tourism infrastructure (Sokhanvar, 2019; Endo, 2006). This is corroborated by the findings of the present study, which illustrate the necessity for more rigorous regulation of foreign investment and the formulation of strategies that integrate sustainability and heritage conservation at all stages of tourism development.

Nevertheless, research conducted by Dodds and Butler (2019) has indicated that unmanaged tourism development can potentially result in resource depletion, habitat destruction, and the displacement of communities. This underscores the necessity for the development of novel strategies and technological solutions that are conducive to sustainability and resource efficiency. It seems evident that technology can play a pivotal role in mitigating the adverse effects of overtourism and advancing sustainable tourism practices. As posited by Buhalis and Amaranggana (2015), the deployment of intelligent visitor management systems, data analytics, and digital platforms enables more effective monitoring of tourism flows, facilitating real-time adaptations to prevent excessive strain on natural resources. The results of this study indicate that contemporary technologies can bolster the competitiveness, appeal, and environmental sustainability of tourism destinations.

In conclusion, this research demonstrates the necessity for a combined strategy that also integrates technology to promote international economic relations and sustainable tourism development. Despite the implementation of numerous initiatives aimed at promoting sustainability, significant challenges remain that necessitate a coordinated approach and systematic support. For instance, support policies based exclusively on subsidies are frequently inadequate for ensuring long-term sustainability (Apostolopoulos et al., 2024). In contrast, the implementation of tax incentives that support firms' transition to more sustainable practices represents a more viable and cost-effective approach. Ultimately, technological innovation can play a pivotal role in addressing overtourism by equipping stakeholders with effective tools for visitor management and the protection of sensitive areas. The utilisation of data and intelligent platforms facilitates the efficient management of resources, thereby reducing environmental impacts while enhancing the sustainable experience of visitors. In light of these considerations, it becomes evident that a coherent and sustainability-oriented tourism model, enhanced by technology and collaboration, has the potential to address the challenges currently facing the sector. Such a model could serve to promote social justice, economic prosperity, and environmental protection.

6. Limitations and Future Research

The present study focuses on data from a specific region of Greece. As a result, the findings may not be generalizable to the country as a whole. Therefore, further research is necessary to determine the external validity of the results. Such additional research could include the extension of the study to more regions and the conducting of cross-regional analyses. Furthermore, a cross-country analysis can facilitate an examination of the cultural, social, and economic differences between countries that may influence sustainable tourism practices. Concurrently, future research could investigate the dynamics of collaboration between disparate

sectors (universities, government, civil society) to advance sustainable tourism. The analysis of such partnerships at the transnational level can provide valuable insights for the development of more effective policies and strategies. Furthermore, future research could examine the potential of technology applications, including digital platforms, data analysis tools, and smart solutions for monitoring and managing tourism flows, as promising avenues for further investigation. Such a study could investigate the extent to which technology facilitates the more efficient utilisation of resources and the reduction of environmental impacts.

References

- Agoraki, K.K., Deirmentzoglou, G.A., Psychalis, M. and Apostolopoulos, S., 2024a. Types of Innovation and Sustainable Development: Evidence from Medium-and Large-Sized Firms. *International Journal of Innovation and Technology Management (IJITM)*, 21(02), pp.1-18.
- Agoraki, K.K., Deirmentzoglou, G.A. and Triantopoulos, C., 2024b. Cultural Values as Catalysts of Technological Innovation for a Sustainable Future. *Sustainability*, 16(5), p.2064.
- Amoatey, C.T., Ameyaw, Y.A., Adaku, E. and Famiyeh, S., 2015. Analysing delay causes and effects in Ghanaian state housing construction projects. *International Journal of Managing Projects in Business*, 8(1), pp.198-214.
- Apostolopoulos, N., Kakouris, A., Liargovas, P., Petropoulos, D. and Anastasopoulou, E., 2024. Agri-food enterprises and relationship marketing during COVID-19: A primary data research through commitment-trust theory. *Journal of International Food & Agribusiness Marketing*, 36(1), pp.3-22.
- Apostolopoulos, N., Kakouris, A., Liargovas, P., Petropoulos, D. and Anastasopoulou, E.E., 2024. Exploring the impact of crises on rural agri-food SMEs: The moderating role of support mechanisms, digitalisation, and networking. *The International Journal of Entrepreneurship and Innovation*.
- Apostolopoulos, N., Liargovas, P., Stavroyiannis, S., Makris, I., Apostolopoulos, S., Petropoulos, D. and Anastasopoulou, E., 2020. Sustaining rural areas, rural tourism enterprises and EU development policies: A multi-layer conceptualisation of the obstacles in Greece. *Sustainability*, 12(18), p.7687.
- Apostolopoulos, N., Makris, I., Apostolopoulos, S. and Anastasopoulou, E.E. and Deirmentzoglou, G.A., 2023, September. Aligning Agri-food Business with Sustainable Development and Quality of Life in Rural Areas: Stakeholders' Perspectives from Greece. In *ECIE 2023 18th European Conference on Innovation and Entrepreneurship Vol 1*. Academic Conferences and publishing limited
- Aratuo, D.N. and Etienne, X.L., 2019. Industry level analysis of tourism-economic growth in the United States. *Tourism Management*, 70, pp.333-340.
- Azary, V., 2004. Globalization and international tourism in developing countries: Marginality as a commercial commodity. *Current Sociology*, 52(6), pp.949-967.
- Bengtsson, M., 2016. How to plan and perform a qualitative study using content analysis. *NursingPlus open*, 2, pp.8-14.
- Budeanu, A., Miller, G., Moscardo, G. and Ooi, C.S., 2016. Sustainable tourism, progress, challenges and opportunities: an introduction. *Journal of cleaner production*, 111, pp.285-294.
- Buhalis, D., 2001. Tourism in Greece: Strategic analysis and challenges. *Current Issues in Tourism*, 4(5), pp.440-480.
- Buhalis, D. and Amaranggana, A., 2015. Smart tourism destinations enhancing tourism experience through personalisation of services. In *Information and Communication Technologies in Tourism 2015: Proceedings of the International Conference in Lugano, Switzerland, February 3-6, 2015* (pp. 377-389). Springer International Publishing.
- Clarke, V., Braun, V. and Hayfield, N., 2015. Thematic analysis. Qualitative psychology: A practical guide to research methods. *Qualitative Psychology: A Practical Guide to Research Methods*; Smith, JA, Ed, pp.222-248.
- Cohen, E., 2012. Globalization, global crises and tourism. *Tourism recreation research*, 37(2), pp.103-111.
- Deirmentzoglou, G.A., Agoraki, K.K. and Patsoulis, P., 2024a. The nexus between cultural values and perceptions of corporate sustainable development. *Social Responsibility Journal*, 20(2), pp.224-242.
- Deirmentzoglou, G.A., Vlasi, E. and Anastasopoulou, E.E., 2024b. DMMO Website Quality, Destination Image and Intention to Use Metaverse Platforms. *Platforms*, 2(4), pp.180-192.
- Deirmentzoglou, G.A., Anastasopoulou, E.E. and Sklias, P., 2024c. International economic relations and energy security in the European Union: a systematic literature review. *International Journal of Sustainable Energy*, 43(1), p.2385682.
- Deirmentzoglou, G.A. and Deirmentzoglou, E.A., 2022, September. Pest analysis of the e-commerce industry: The case of Greece. In *Business Development and Economic Governance in Southeastern Europe: 13th International Conference on the Economies of the Balkan and Eastern European Countries (EBEEC), Pafos, Cyprus, 2021* (pp. 315-323). Cham: Springer International Publishing.
- Dodds, R. and Butler, R., 2019. The phenomena of overtourism: A review. *International Journal of Tourism Cities*, 5(4), pp.519-528.
- Drakopoulou-Dodd, S., McDonald, S., McElwee, G. and Smith, R., 2014. A Bourdieuan analysis of qualitative authorship in entrepreneurship scholarship. *Journal of Small Business Management*, 52(4), pp.633-654.
- Dwyer, L., 2022. Foreign direct investment in tourism: host destination opportunities and challenges. *Tourism and foreign direct investment*, pp.11-30.
- Endo, K., 2006. Foreign direct investment in tourism—flows and volumes. *Tourism management*, 27(4), pp.600-614.
- Hassink, J., Hulsink, W. and Grin, J., 2016. Entrepreneurship in agriculture and healthcare: Different entry strategies of care farmers. *Journal of Rural Studies*, 43, pp.27-39.

- Higgins-Desbiolles, F., 2020. The “war over tourism”: Challenges to sustainable tourism in the tourism academy after COVID-19. *Journal of sustainable Tourism*, 29(4), pp.551-569.
- Hussain, J., Salia, S. and Karim, A., 2018. Is knowledge that powerful? Financial literacy and access to finance: An analysis of enterprises in the UK. *Journal of Small Business and Enterprise Development*, 25(6), pp.985-1003.
- Gössling, S., 2002. Global environmental consequences of tourism. *Global environmental change*, 12(4), pp.283-302.
- Graci, S., 2020. Collaboration and partnership development for sustainable tourism. In *Tourism and Sustainable Development Goals* (pp. 232-249). Routledge.
- Kenny, A. and Duckett, S., 2003. Educating for rural nursing practice. *Journal of Advanced Nursing*, 44(6), pp.613-622.
- Khalid, U., Okafor, L.E. and Burzynska, K., 2022. Do regional trade agreements enhance international tourism flows? Evidence from a cross-country analysis. *Journal of Travel Research*, 61(6), pp.1391-1408.
- Kourkoumelis, A., Anastasopoulou, E.E., Deirmentzoglou, G.A., Masouras, A. and Anastasiadou, S., 2024, September. Artificial Intelligence and Managerial Decision-Making in International Business. In *European Conference on Innovation and Entrepreneurship* (Vol. 19, No. 1, pp. 363-369).
- Li, K.X., Jin, M. and Shi, W., 2018. Tourism as an important impetus to promoting economic growth: A critical review. *Tourism management perspectives*, 26, pp.135-142.
- Lu, J. and Nepal, S.K., 2009. Sustainable tourism research: An analysis of papers published in the Journal of Sustainable Tourism. *Journal of sustainable Tourism*, 17(1), pp.5-16.
- Okoli, C., 2023. Inductive, abductive and deductive theorising. *International Journal of Management Concepts and Philosophy*, 16(3), pp.302-316.
- Pan, S.Y., Gao, M., Kim, H., Shah, K.J., Pei, S.L. and Chiang, P.C., 2018. Advances and challenges in sustainable tourism toward a green economy. *Science of the total environment*, 635, pp.452-469.
- Pistikou, V., Flouros, F., Deirmentzoglou, G.A. and Agoraki, K.K., 2023. Sustainability Reporting: Examining the Community Impact of the S&P500 Companies. *Sustainability*, 15(18), p.13681.
- Pratt, S., 2024. Tourism and Foreign Direct Investment: Issues, Challenges and Prospects. *Tourism Culture & Communication*, 24(3), pp.255-256.
- Saayman, A., Figini, P. and Cassella, S., 2016. The influence of formal trade agreements and informal economic cooperation on international tourism flows. *Tourism Economics*, 22(6), pp.1274-1300.
- Scheyvens, R. and Cheer, J.M., 2022. Tourism, the SDGs and partnerships. *Journal of Sustainable Tourism*, 30(10), pp.2271-2281.
- Schmidt, D., Reymont, J., Webster, E., Kirby, S. and Lyle, D., 2020. Workplace-based health research training: a qualitative study of perceived needs in a rural setting. *Health Research Policy and Systems*, 18, pp.1-7.
- Sokhanvar, A., 2019. Does foreign direct investment accelerate tourism and economic growth within Europe?. *Tourism management perspectives*, 29, pp.86-96.
- Thomas, D.R., 2006. A general inductive approach for analyzing qualitative evaluation data. *American journal of evaluation*, 27(2), pp.237-246.
- Van Burg, E., Cornelissen, J., Stam, W. and Jack, S., 2022. Advancing qualitative entrepreneurship research: Leveraging methodological plurality for achieving scholarly impact. *Entrepreneurship Theory and Practice*, 46(1), pp.3-20.
- Vlassi, E., Deirmentzoglou, G.A. and Irakleidi, E., 2023, September. Capturing Destination's Cognitive and Affective Image on Social Media. The Case of Pafos, Cyprus. In *The International Conference on Strategic Innovative Marketing and Tourism* (pp. 19-28). Cham: Springer Nature Switzerland.
- Wallace, C., Farmer, J. and McCosker, A., 2019. Boundary spanning practices of community connectors for engaging ‘hardly reached’ people in health services. *Social Science & Medicine*, 232, pp.366-373.

Presenting a Model to Improve the Healthcare Sector To Attract Medical Tourism

Michaëlle Deonarain

Cape Peninsula University of Technology, Cape Town, South Africa

deonarainm@cput.ac.za

Abstract: To achieve the Sustainable Developing Goals set by the United Nations in 2015 in Agenda 2030, countries are striving to rebuild their economies during this post pandemic era. The ultimate goal of Agenda 2030 is to end poverty and inequality, protect the planet and ensure that all people enjoy health, justice and prosperity by 2030. The global healthcare sector has gained attention as an essential component in accomplishing SDG3 which focuses on good health and wellbeing. The global tourism sector has aligned itself with SDG1 which focuses on zero poverty in all its forms everywhere. Additionally, SDG12 focuses on ensuring sustainable consumption and production patterns, which is key to sustain the livelihoods of current and future generations. This paper aims to present a model to strengthen to healthcare sector in South Africa to improve medical tourism to the region in order to achieve the SDG goals highlighted. South Africa already has a robust medical tourism sector as the private healthcare sector is able to provide cost effective solutions and shorter waiting times for specific medical procedure. South Africa's private healthcare system is world-class for medical tourism because it is supported by a thriving medical insurance market. However, the public healthcare system has not been able to benefit from the current synergies between to medical tourism and private healthcare sector. Upgrading and expanding the healthcare sector may lead to improvements and growth in both the sectors and better achievement of the SDG goals. A study was conducted in the South African Healthcare sector using mixed methods to collect data from a purposive sample while adhering to a descriptive exploratory paradigm. A comprehensive questionnaire was administered to 322 participants who worked in frontline positions at selected public healthcare facilities in South Africa. The data showed that frontline healthcare personnel experience daily struggles and challenges that limit their ability to provide high-quality of service. Based on the results of this study, this paper will present a model for improving the quality of healthcare service delivery in an effort to provide improved and expanded services to the medical tourism industry.

Keywords: Public health, Medical tourism, Service delivery, Challenges in healthcare, Sustainable development goals

1. Introduction

The public healthcare sector is an essential component of society, particularly in developing nations like South Africa, where the majority of the population lives below the poverty line and cannot afford private healthcare (Galal, 2022). Reliance on public healthcare means that the sector must be equipped with resources to cope with the needs of society. The South African healthcare system has come under scrutiny after repeated reports of low quality of service delivery. Despite extensive research and interventions, there is little progress regarding the quality of service delivered at public healthcare institutions in South Africa (Maphumulo, 2019).

According to Mandagi & Tappy (2024), there are four main elements that influence how appealing medical travel is:

- Economic considerations including the price of medical care and competitiveness of the destination,
- Cultural and social aspects including geographic distance, tourism experience and destination features.
- Healthcare standards and infrastructure including support for medical tourism infrastructure, medical treatment quality and service quality considerations,
- Marketing and promotions including branding, marketing and perceptions of the locals at the location.

The predicted value of medical tourism worldwide is \$31.91 billion in 2023 and is expected to reach \$52.87 billion in 2027. Top travel destinations include Mexico, Costa Rica, Malaysia, Thailand, Turkey, and India; the United Arab Emirates is one of the nations with the quickest pace of growth (Juta medical brief, 2024). South Africa is seen as a favourable medical tourism destination with 27 458 travellers who arrived in the country for medical purposes between 2018 and 2023 (Juta medical brief, 2024). South Africa is seen as a perfect destination for recovery and is marketed as the sun, surgery and safari destination. Cosmetic surgery, fertility treatments, dentistry, orthopaedics, and cardiac care are the primary services sought by medical tourist in South Africa (Ancy, Shenoy, Jodalli & Pasha, 2020).

The collaboration of the sectors may foster expansion for both sectors where medical tourism agencies are able to offer services to a larger audience and the healthcare sector can benefit from improved service offerings, better training opportunities and increase ability to generate higher revenue. By drawing in more "cash-paying"

clients and boosting hospital and facility foot traffic, medical tourism can have a substantial positive impact on the community's public healthcare system (Juta medical brief, 2024). For this vision to be achieved, specific systems must be designed and implemented to reach these goals. The aim of this paper is to present a model to enhance and improve the healthcare system in south Africa to foster growth of the medical tourism industry.

2. Literature Review

The healthcare system should adopt a holistic system view to give high quality healthcare, which may be accomplished by considering quality, cost and efficiency aspects which cannot be viewed independently and are symbiotic to produce mutually beneficial outcomes. One cannot expect high quality and efficient service from healthcare workers who are not equipped efficiently (Lee, Khong, and Ghista (2006). Processes must be enforced to ensure that high-quality healthcare is offered to attract medical tourists (Vovk, Beztelesna & Pliashko, 2021).

There are specific aspects of healthcare procedures that give rise to specific process modelling challenges in the healthcare sector (Pufahl, Zerbato, Weber and Weber, 2022). Patient centeredness is a key component of any interaction in a healthcare facility is the patient and not a document that needs to be completed or an item used to treat an ailment. The patient must be actively involved in therapy and care decision making. Accordingly, there is a need for good time management where treatment and diagnosis is done within a reasonable time frame, subject to the availability of resources, hospital regulations and patient conditions. This may aid intensive decision making, where a decision is made regarding the treatment and care for patients, it must be stored in a data management system to facilitate information exchange and transformation of tasks. Where digital information systems are not available, paper documents and other medical devices are acceptable. Most importantly the decision must be recorded to prevent any future complications or delayed treatments.

Healthcare facilities should have a range of different specialists, treatments and resources available to provide the best possible treatment as well as the ability to present different treatment options to patients. Additionally, healthcare facilities are extremely dependent on resources, therefore scarce and expensive resources such as medical specialist equipment and rooms that are shared amongst departments must be properly managed and optimised.

South Africa has positioned itself well to attract medical tourists due to its well-developed healthcare system driven mainly by the private sector. The treatments offered is seen as high quality and good value for money. The government has recognised the potential of medical tourism and has taken steps to promote the sector by actively marketing services to international audiences promoting medical and wellness tourism with safari packages (Ancy et al., 2020).

3. Research Design and Methods

The mixed methods research strategy was chosen as the best methodology for the study since it contains components of both qualitative and quantitative research methodologies. To meet the aim of this research paper, it was critical to employ both qualitative and quantitative data.

For the quantitative component of the study, a positivist paradigm was used to ensure that the data received and interpreted was limited to only the responses retrieved, measured and objectively interpreted from an outside perspective, allowing the researcher to focus on the facts rather than the respondents' opinions and feelings. For the qualitative parts of the study, a descriptive exploratory technique was used, which is a type of research design that seeks information in a systematic manner. The target population was chosen in accordance with the stringent inclusion criteria outlined throughout the study's proposal stages. A total of 360 units of analysis were targeted to obtain a 95% confidence level and a 5% margin of error, using 5216 as the overall population size (Sharma, Mudgal, Thakur, and Gaur, 2020). There were 322 questionnaires completed resulting in an 89% response rate.

Each respondent was a front-line staff member who worked in a public hospital and was directly involved in the delivery of services, such as admissions, administration, clinical, nursing, medical care, radiography, and pharmacy. Due to difficulties in obtaining authorisation to distribute surveys, this study only covered two central hospitals in two regions in South Africa. The non-probability purposive sampling technique was deemed appropriate for this research by virtue of the subjective techniques used in selecting the participants for the study.

The questionnaire was designed to explore the challenges experienced by frontline healthcare workers and how it affects their ability to provide high quality of service delivery giving insight on how challenges are experienced

while they perform their daily duties. If the challenges are understood, then the ability to compete in the medical tourism market could be ascertained.

This paper only focuses on the data analysed to produce the model for improving service delivery in the South African Public Healthcare Sector to facilitate growth and enhanced service offering to medical tourists.

4. Research Findings

Both qualitative and quantitative methods produced notable outcomes. Table 1 summarises the challenges experienced that prohibit public health institutions from promoting medical tourism activities.

Table 1: Summary of Challenges experienced

Shortages	Adverse events
• Staff - Skills and training - Management and leadership crisis • Resources - Lengthy waiting time - Poor hygiene - Poor infection control measures - Poor recordkeeping - Lack of or unequal distribution of resources - Water shortages on a regular basis - Load Shedding	- Increased litigation because of avoidable errors - Increased disease burden - Large numbers of patients beyond the capacity of your organisation - Slow progress in restructuring the healthcare system including strategies adopted by government to improve the quality of healthcare delivery.

5. Discussion/Analysis

The front-line healthcare workers shared their daily experiences and provided insight into some of the challenges that prevent the delivery of high-quality services. The challenges listed in Figure 1 make it difficult to promote medical tourism. High quality of services is essential to high performing healthcare systems that is suitable to promote medical tourism (Mandagi & Tappy, 2024).

5.1 Favourable Work Environment

A favourable working environment in the healthcare sector plays a substantial role in the well-being of healthcare professionals, patients and the healthcare facility as a whole. It helps to maintain team morale, reduce errors and promote high quality work. It enables the staff to provide better care to patients which benefits the healthcare facility. However, the respondents report that there is inadequacy of key components of service delivery namely resources, staff, medical supplies, electricity, and water. These shortages have a ripple effect on the healthcare facility and results in other challenges which include lengthy wait times, poor hygiene, poor infection control measures and poor record keeping.

The lack of material resources had majority of the respondents complaining of high cross infection rates due to poor hygiene measures as there are not enough cleaners and supplies to clean. The laundry is never on time and the patients stay in soiled linen due to the shortage resulting in delayed treatments and procedures in theatre. The high cross infection rates means longer stays in hospital creates strain on the system. The staff are also not safe as they get infected leading to high absenteeism thus increasing the workload and causes frustration for staff at work. Patients also sit in overcrowded conditions for long periods of time which increases complications and compromises patient safety.

Some resources are not distributed evenly leading to staff having to go to other departments to borrow supplies which delays treatment which increases the workload of the staff. Equipment that breaks takes a long time to

fix and staff must make alternative plans to help the patients. There was also an appeal for hospitals to buy original products.

Comments regarding record keeping alluded to a shortage of stationery for manual record keeping or no computer system for digital record keeping. Those who have a computer system to keep records indicated that they need some training to enhance the computer skills. Others are appealing for a computer system because they are keeping records on small pieces of paper which is easily lost. When the paper is finished, no records are kept. A problem with WIFI was also cited where staff use their own data to communicate.

The shortage of staff is a prominent theme indicating that this challenge is the foundation of the other challenges cited. Hiring more staff may solve many challenges but it is imperative that the right staff are in suitable positions as a management and leadership crisis was cited. Due to a lack of skills and a low understanding of what is happening at ground level, leaders are making wrong decisions regarding training and distribution of resources. Large numbers of patients beyond the capacity of the hospital and a shortage of staff leads to an increased level of litigation because of avoidable errors as staff take on more duties particularly in times of increased disease burden.

Compensation and rewards are seen as motivational factors for being at work as it enables employees to meet their personal and social commitments. Generally, employees are satisfied with their jobs if there is “fair pay.” When asked what motivates them the most, salary increase came in third ranking after recognition and promotion which reveals that the frontline employees are not driven by money but simply wants to be recognised for their work by being rewarded with a promotion to enable the salary increase. They are willing to change their roles and take on higher level work for a salary increase.

Due to a staffing deficit, the working hours have increased which requires investigation. Based on the discussion and the responses provided, it can be concluded that the conditions under which the frontline workers are performing daily duties are unfavourable and not conducive to the provision of high quality of services and high quality of worklife (QWL).

5.2 Training

Table 2: Question

Question	Yes	NO
Have you received training based to improve the quality of healthcare that you provide?	73%	27%
Did the training help you improve your knowledge and skillset?	69%	31%

According to Table 2, 73% of the respondents received training, and 69% believe that the training was beneficial in enhancing their knowledge and skill set. However, we need to ascertain which skills were improved because, as 31% of respondents noted, not all training contributed to knowledge and skills advancement. Training alone cannot teach all skills as shown. Collaboration with other service industries such a hospitality may be instrumental in improving the skillset of hospital workers. It can be concluded that although training is important, the right training programmes will bring out the best in hospital staff (Bala, Yerra, Katkuri, Podila and Animalla, 2022).

5.3 Organisational Culture

Organisational culture is grounded by policies that should ensure conducive and supportive work environments that involve engagement and good communication which help organisations match work activities with the needs of their employees. Respondents lamented the high disease burden, which makes it more difficult to find trained healthcare workers because these professionals are frequently overworked and burnt out. The complications that follow include a longer stay in the hospital costing more money, but there is also a higher risk of patient death, which increases the number of legal claims. These problems influence the organisation’s ability to provide services, increase credibility, and maintain financial health. Implementing policies that promote an autonomous and co-operative workforce can help ensure that despite the challenges, high quality service delivery is still possible.

Table 3: Pattern Matrix: Organisational culture

Component		
	1	2
The organisational culture and supports an environment that can deliver high quality of service.	0.833	
The resources required to implement service quality improvements are available.	0.809	
There are key individuals within my organisation who are resistant to change.		0.793
There is no incentive to implement service quality improvements plans.		0.767

Extraction Method: Principal Component Analysis. Rotation Method: Promax with Kaiser Normalization.

a. Rotation converged in 3 iterations.

Table 3 shows Likert scale questions that aimed to gauge the organisational culture prevalent at the healthcare institutions. There were 7 statements presented in the questionnaire but only 4 loaded with significant factor loading under two components. The principal component analysis (PCA) was applied and revealed that the first component explained 36.80% of the variance, the second component explained 27.45%, and the third component explained 19.75%, together accounting for 83.99% of the total variance. The fourth component explained the remaining 16.00%, bringing the cumulative variance to 100%.

The other three statements were “my organisation does not have the capacity to implement service quality improvements plan”, “I believe a higher quality of work life will improve my service delivery” and “My team are committed to improving service quality”.

Based on the item loading on each factor and the interpretation from the factor analysis, two components/factors were identified regarding the perceptions of organisational culture regarding the implementation of new plans for service quality improvement. The first and second factor loaded with 2 items each with significant factor loadings. The results show that there is indeed a supportive organisational culture that is capable of high- quality service delivery with the highest factor loading of 0.833. However, with lower factor loadings, the results allude to a situation where although there is support, resources must be considered when making plans to improve service quality (0.809). There are also key individuals within the teams who are resistant to change (0.793) perhaps because there are no incentives offered (0.767) to implement plans related to service quality improvement. It is believed that the ideas of employee involvement and incentive when implementing plans will boost worker morale and dedication. We can draw the conclusion that the organisational atmosphere does not support raising the standard of services provided and raising QWL. A favourable climate may be maintained, nevertheless, with changes in attitudes, effective leadership, and support from higher levels.

6. Recommendations

A high- performing healthcare system is the consequence of the mutually beneficial relationship and exclusive interaction between quality of work life experienced and service delivery standards which could be further enhanced by fostering intersectoral collaboration with the medical tourism industry. When developing the model depicted in Figure 1, the guidebook on best practices in public health (OECD, 2022) was consulted and well as the results of the study. To increase employee QWL and, ultimately, service delivery, it is critical to focus on enhancing the complete healthcare system holistically. To address the issues with service delivery, a top-down strategy is required. The model that emerged from the findings suggest that governments should prioritise upgrading the public healthcare system, which will increase the QWL of healthcare workers and, as a result, high- quality service delivery can be accomplished.

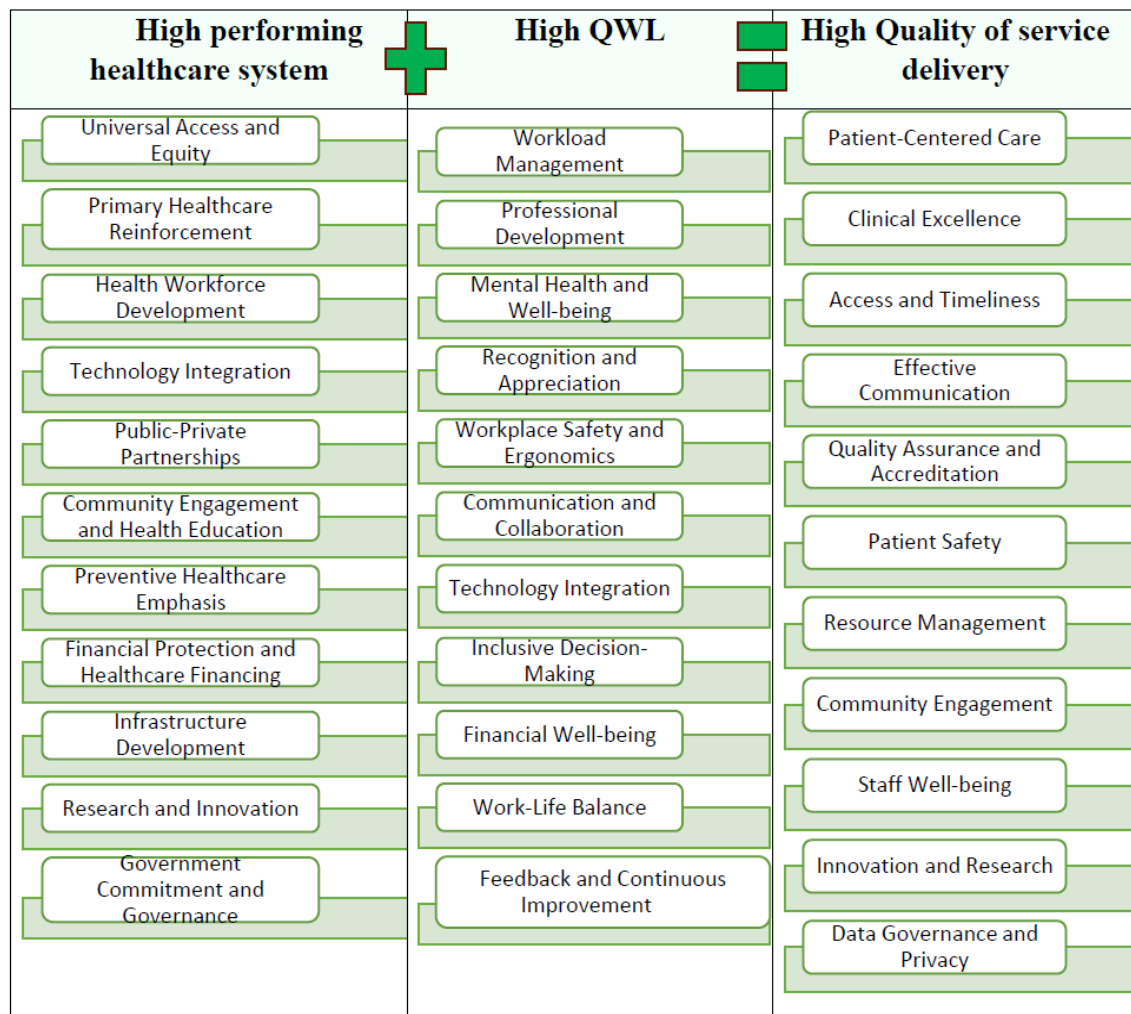


Figure 1: Proposed model for a high performing healthcare system

6.1 High Performing Healthcare System

An emphasis on universal healthcare systems to ensuring that all citizens, regardless of socioeconomic background, have equitable access to quality healthcare. Reinforcing the primary healthcare facilities and services to provide thorough preventive care at the community level and encouraging community-based health programmes to address local health needs is crucial. NHI can invest in training healthcare workers, guaranteeing an adequate and skilled workforce to meet the healthcare needs of the population including addressing shortages in critical healthcare professions, particularly in rural and underprivileged areas. The results also indicated that it may be valuable to implement incentive programmes to attract and retain skilled healthcare workers.

Implementing robust health information systems can improve the collection, analysis and reporting of data which can be utilised to identify health trends, allocate resources effectively and make evidence-based decisions for healthcare planning and delivery. We must leverage technology for telemedicine, electronic health records and health information systems to enhance efficiency and accessibility and implement data analytics to identify health trends and share resources efficiently.

A high performing health care system can foster collaboration between private and public sectors to optimise resource allocation and improve service delivery. Private sector involvement in areas such as infrastructure development, healthcare financing and technology innovation can optimise healthcare resources and increase capacity. Collaboration can help improve service delivery, reduce wait times and enhance overall efficiency in the healthcare system. Additionally, collaborating with the medical tourism industry may present more opportunities for growth of both the sectors.

It is also critical to encourage community participation in healthcare decision-making processes and to develop widespread health education campaigns to empower individuals and communities to take ownership of their health through vaccination programmes, health screenings, and lifestyle education.

6.2 High QWL

High QWL of employees must be a priority. To ensure that staff levels are always adequate and to prevent burnout and fatigue among healthcare workers, flexible scheduling options to accommodate the diverse needs of healthcare workers must be implemented. However, implementing such a measure is dependent on funding. Similarly, funding also affected the provision of continuous training and education opportunities to enhance the skills and knowledge of healthcare workers. These opportunities can be linked to clear career pathways and opportunities for advancement within the healthcare system.

An emphasis on staff mental health and well-being could be a method for providing access to counselling services for healthcare professionals, and many respondents said that implementing stress management efforts could promote a supportive work environment. Furthermore, a programme linked to recognition and appreciation to recognise and appreciate the contributions of healthcare workers must be tied to a fair and transparent incentive system to recognise exceptional performance.

The physical work environment must ensure strict adherence to safety protocols to protect healthcare workers from occupational hazards. To do this, one can design workspaces with ergonomic considerations to prevent physical strain and injuries. There must also be measures in place to ensure that there are open communication channels to foster open communication between clinical, administrators and support staff. It is also important to have regular team-building activities to promote a collaborative culture and interdisciplinary collaboration.

Implementing technology may support the employees by reducing the administrative burden, keep accurate records and facilitate easy communication. However, when implementing new technology, ensure that all staff attend the training. Additionally, telemedicine may be used to enhance healthcare delivery and provide flexibility to healthcare professionals and might be particularly useful for communities that are difficult to reach in rural areas.

Financial well-being is critical to a stress-free life therefore while providing competitive salaries and benefits to healthcare professionals is important, it might be credible to offer financial literacy programmes to help healthcare workers manage their finances effectively. Apart from money, work-life balance may be achieved by flexible work arrangements and family-friendly policies that support healthcare workers. It is important to create feedback platforms to obtain information from healthcare professionals regarding improving work circumstances. Based on the feedback received, leadership must act on feedback to continuously improve work conditions and quality of life of healthcare professionals.

6.3 High Quality of Service Delivery

The model depicted in Figure 1 indicates that if the healthcare system is operating at maximum potential, then the healthcare workers will attain higher quality of work life because workers are supported and have all the resources that they require to provide high quality of service. One of the key performance indicators of high quality of service in the healthcare sector can be patient-centred care where there is active participation between the patient and healthcare provider regarding decision making and treatment plans which can be achieved by enhancing communication between the healthcare provider and the patient. To achieve this, healthcare professionals must be trained to be culturally competent and sensitive to the diverse needs of patients, one of which is to be spoken to in their mother tongue. Respondents of this study requested to learn the native languages to enable smooth communication.

It is also important to encourage the use of and recording of evidence-based practices and clinical guidelines to achieve clinical excellence. Ongoing training to healthcare professionals must be provided to ensure they are updated on the latest medical advancements which may improve access to and shorten timelines for appointments, tests, and procedures. To monitor and improve service quality, regular audits and assessments must be conducted to monitor and improve service quality and healthcare facilities must be encouraged to participate in accreditation programmes to maintain and elevate standards.

Patient safety is of utmost importance, with the reports of patients absconding, institutions must establish and enforce strict safety protocols to minimise medical errors and enhance patient safety. There needs to be efficient use of resources, including staffing, equipment, and facilities so that the protocols established are attainable.

Community engagement is also a critical part of ensuring high quality of service delivery. Conducting health education programmes within communities to promote preventive care and early detection will alleviate the pressure on the healthcare system. Similarly, healthcare worker support programmes must be implemented to address the well-being of healthcare professionals, including mental health support and promote work-life balance to prevent burnout among healthcare workers.

Malakoane et al., (2020) explain the creation and implementation of a provincial intervention model to enhance the delivery of public healthcare services in South Africa's Free State province, which aided in monitoring and reporting. The model functioned as a framework for addressing issues such as insufficient resources, poor infrastructure, and a shortage of competent healthcare staff. It entailed enhancing health information systems, boosting primary healthcare services, and encouraging community involvement. Malakoane et al. (2020) suggested that the concept be implemented in other South African provinces to improve the general quality of health care in the country. Aspects from Malakoane's model were incorporated into the model depicted in Figure 1.

7. Conclusion

This paper aimed to present a model derived from the results of a larger study, to improve the healthcare system to promote medical tourism. The paper presented results on challenges experienced by healthcare workers and explored possible reasons for these challenges.

The paper makes a significant contribution to the strategic discussion on healthcare and medical tourism by providing actionable insights for policymakers, healthcare providers and stakeholders in the healthcare and medical tourism industry. By demonstrating how enhancing healthcare quality can boost medical tourism, the paper offers a pathway for countries like South Africa to leverage healthcare as a key component of their economic and social development strategies. The recommendation is that a model for a high performing healthcare system be adopted to promote medical tourism and in doing so, this paper serves as a valuable resource to provide strategic guidance for policymakers and stakeholders involved in healthcare and tourism.

The model is built on the empirical findings and leaves practical recommendations to improve service offerings of public healthcare systems. Such recommendations include expanding and modernising healthcare facilities to accommodate the growing demand from domestic, regional and international patients and enhancing the skills and quality of work life of healthcare workers to improve service quality. Strengthening the healthcare systems in developing economies, particularly in the context of medical tourism and sustainable development may assist in the achievement of SDG1, SDG3, and SDG12.

References

- Bala, S., Yerra, A., Katkuri, S., Podila, K. and Animalla, V. 2022. Evaluation of simulation skills of healthcare workers at a tertiary care center: A perspective towards coronavirus disease 2019 third wave preparation. *Journal of Family & Community Medicine*, 29(2):102-107. Available from: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC9221233/> (Accessed 20 September 2023).
- Galal, S. 2022. Number of people living in extreme poverty in South Africa 2016-2025. Statista (online) Available at: <https://www.statista.com/statistics/1263290/number-of-people-living-in-extreme-poverty-in-south-africa/> (Accessed 21 March 2023).
- Juta medical brief, 2024. SA ripe with potential for medical tourism growth (online) Available at: <https://www.medicalbrief.co.za/sa-ripe-with-potential-for-medical-tourism-growth/> (accessed 15 Oct 2024).
- Lee, P.M., Khong, P. and Ghista, D.N. 2006. Impact of deficient healthcare service quality. *The TQM Magazine*, 18(6):563-571.
- Mandagi, D. W., & Tappy, Y. P. (2024). Determinants of Health Tourism Destination Attractiveness: A Comprehensive Systematic Review. *Jurnal Studi Perhotelan Dan Pariwisata*, 2(2), 57–69. <https://doi.org/10.35912/jspp.v2i2.3261>.
- Malakoane, B. Heunis, J.C., Chikobvu, P., Kigozi, N.G. and Kruger, W.H. 2020. Public health system challenges in the Free State, South Africa: a situation appraisal to inform health system strengthening. *BMC Health Services Research*, (20):58. Available from: <https://doi.org/10.1186/s12913-019-4862> (Accessed 10 June 2022).
- Maphumulo, W.T. & Bhengu, B.R. 2019. Challenges of quality improvement in the healthcare of South Africa post-apartheid: A critical review. *Curationis*, 42(1):a1901. Available from: <https://doi.org/10.4102/curationis> (Accessed 14 April 2022).
- Mosisa, G., Muktar, A., Adugna, A. and Bizuneh, W. 2022. Quality of work-life and associated factors among Nurses working in Wollega zones public hospitals, West Ethiopia: A cross-sectional study. *International Journal of Africa Nursing Sciences*, 17.
- OECD. 2022. Guidebook on Best Practices in Public Health. Paris: OECD Publishing. Available from: <https://doi.org/10.1787/4f4913dd-en> (Accessed 11 June 2023).

- Padmaningrum, N. & Setiawati, T. 2020. The influence of quality of work life and organizational culture on employee performance with job satisfaction as an intervening variable: 250-266.
- Poorani, A.A., Kline, S.F., DeMicco, F.J. and Sullivan, W. 2023. Hospitality to healthcare: Patient Experience Academy, a successful alliance between the Christiana Care Health System and the University of Delaware. *International Journal of Hospitality Management*, 112, 103422. Available from: <https://doi.org/10.1016/j.ijhm.2022.103422> (Accessed 11 December 2023).
- Pufahl, L., Zerbato, F., Weber, B. and Weber, I. 2022. BPMN in healthcare: Challenges and best practices. *Information Systems*, 107. Available from: <https://doi.org/10.1016/j.is.2022.102013> (Accessed 19 June 2023).
- Sharma, S.K., Mudgal, S.K., Thakur, K. and Gaur, R. 2020. How to calculate sample size for observational and experimental nursing research studies. *National Journal of Physiology, Pharmacy and Pharmacology*, 10(1):1-8.
- Vovk, V., Beztelesna, L. and Pliashko, O., 2021. Identification of factors for the development of medical tourism in the world. *International Journal of Environmental Research and Public Health*, 18(21), p.11205.
- Wong, C.A. and Laschinger, H.K.S. 2015. The influence of frontline manager job strain on burnout, commitment and turnover intention: A cross-sectional study. *International Journal of Nursing Studies*, 52:1824-1833. Available from: <http://dx.doi.org/10.1016/j.ijnurstu.2015.09.006> (Accessed 30 June 2022).

Memorable Tourism Experience in Hot-Air Ballooning: Its Antecedents and Consequences

Yusuf Dündar¹, Cemal Ersin Silik² and Isa Yayla³

¹Faculty of Tourism, Selçuk University, Konya, Türkiye

²Faculty of Tourism, Ankara Hacı Bayram Veli University, Ankara, Türkiye

³Ministry of Culture and Tourism, Ankara, Türkiye

yusuf.dundar@selcuk.edu.tr

cemal.silik@hbv.edu.tr

isa.yayla@ktb.gov.tr

Abstract: Hot-air ballooning is considered an activity conducted in rural areas that involves adventure and participants' interactions with the natural environment. A hot-air balloon ride is regarded as a memorable tourism experience. Memorable tourism experiences are argued to be the best predictors of future behaviours. If tourists have a positive perception of the destination country and the destination itself, they are more likely to feel that they will have a memorable tourism experience, which in turn leads to higher revisit and recommendation intentions. Empirical research investigating the antecedents and consequences of memorable tourism experiences remains insufficient. This study, leveraging the Theory of Planned Behaviour and focusing on hot-air ballooning, aims to fill this gap by proposing and testing a model that explores the relationships between country image, destination image, memorable tourism experience, revisit intention, and recommendation intention. The relationships were examined using PLS-SEM. Data were collected from foreign tourists participating in hot-air balloon tours in Cappadocia, Türkiye, one of the leading destinations for hot-air ballooning in the world (N=764). According to the regression analysis results, country image has a strong positive effect on destination image ($\beta = 0.86$, $t = 71.976$, $p < 0.01$). Additionally, the country image positively influences memorable tourism experience ($\beta = 0.34$, $t = 7.018$, $p < 0.01$). Destination image also has a positive impact on memorable tourism experience ($\beta = 0.60$, $t = 12.951$, $p < 0.01$). Furthermore, destination image mediates the effect of country image on memorable tourism experience ($\beta = 0.52$, $t = 12.684$, $p < 0.01$). Finally, a memorable tourism experience has a strong positive effect on future behavioural intentions ($\beta = 0.89$, $t = 66.672$, $p < 0.01$). It is emphasized that in destinations recognized for hot-air ballooning, such as Cappadocia, creating a positive country and destination image can enhance the likelihood of tourists revisiting and recommending the destination to others. In this context, when developing marketing strategies, the impact of the country's image on destination image should be considered, and the focus should be on providing tourists with memorable experiences. Since convenience sampling method was used in the data collection process in this study, it is an exploratory study, and the generalizability of the results is limited.

Keywords: Hot-Air ballooning, Memorable tourism experience, Image, Future behaviours, Cappadocia, Türkiye

1. Introduction

Hot-air ballooning is regarded as a niche form of touristic activity, conducted in rural areas, that offers participants interaction with the natural environment, authentic experiences, and a strong sense of excitement. It can be categorized within nature-based tourism or adventure tourism (Robinson and Novelli, 2005; Bentley *et al.*, 2001; Novotna *et al.*, 2021; Cloke and Perkins, 2002; McKay, 2013). Hot-air ballooning, as an atypical, unique, and distinctive form of tourism activity, offers participants a memorable tourism experience (Novotna *et al.*, 2019; Kim *et al.*, 2012; Bertan, 2020).

In Türkiye, balloon flights for tourism began in 1991 (Nevsehir Investment Support Office, 2017). Balloon tourism is becoming increasingly popular in Türkiye, as it is worldwide, with Cappadocia and Pamukkale standing out as prime destinations for balloon tours. In Türkiye, there are a total of 57 balloon companies registered with the Directorate General of Civil Aviation, with the majority (67%) based in Cappadocia. In 2023, hot-air balloons transported 744 661 passengers, with the vast majority (86%) joining tours in the Cappadocia region (Directorate General of Civil Aviation, 2024). Especially in Cappadocia, it is well known that nearly all participants in hot-air balloon tours are foreign tourists due to the high prices.

A memorable tourism experience is simply defined as a tourism experience positively remembered after the event has occurred (Kim *et al.*, 2012). This type of experience arises when tourists visit a destination of interest and find something meaningful that connects them to a specific place (Quinlan and Carmichael, 2010). Researchers argue that a memorable tourism experience is the best predictor of future behaviours, such as revisit and recommendation intentions (Chandralal *et al.*, 2015; Kim *et al.*, 2012; Neuhofer *et al.*, 2014). Furthermore, country image and destination image are recognized as important antecedents of a memorable tourism experience (Zhang *et al.*, 2018). This study aims to examine the relationships among country image, destination image, memorable tourism experience, revisit intention, and recommendation tendency in hot-air

ballooning, with a focus on Cappadocia. We hope that this study will contribute to the literature in multiple ways. Studies evaluating hot-air ballooning within the scope of memorable tourism experiences and focusing on the outcomes of such experiences are quite limited (Bertan, 2020). Moreover, empirical research investigating the antecedents and outcomes of memorable tourism experiences remains insufficient (Zhang *et al.*, 2018). Additionally, research examining the effects of two significant constructs, such as country image and destination image, on memorable tourism experiences is scarce. For these reasons, the current study holds the potential to fill a significant gap in the literature.

2. Theoretical Framework and Hypotheses

2.1 Theoretical Basis

The theoretical foundation of the current research is based on the Theory of Planned Behaviour (TPB). TPB, developed by Ajzen (1991), is a model aimed at understanding individuals' behavioural intentions. TPB is particularly favoured in experience-oriented sectors such as tourism, as it uses core components like attitudes, subjective norms, and perceived behavioural control to explain individuals' intentions and behaviours. In balloon tourism, factors such as country and destination image contribute to shaping visitors' intentions by fostering a positive attitude toward the destination (Bigné *et al.*, 2009). Research indicates that country and destination image lay the groundwork for memorable tourism experiences, which directly influence tourists' behaviours, such as revisit and recommendation intentions (Kim *et al.*, 2012). Within this theoretical framework, a unique and visually striking experience like hot-air ballooning allows visitors to create memorable moments, fostering their intention to revisit (Chen and Tsai, 2007). Moreover, memorable tourism experiences are known to evoke a strong emotional response, which enhances the intention to recommend the experience. When assessed within the TPB framework, such intentions are suggested to strengthen further based on tourists' perceived level of control and the support or norms from their social environment (Lam and Hsu, 2004).

2.2 Hypothesis Development

2.2.1 Country image and destination image

Country image refers to the overall perception of a country on both national and international levels, shaped by its cultural, political, economic, and social characteristics. Destination image, on the other hand, represents the overall image of a tourist destination as perceived by visitors or potential tourists. This includes the mental perceptions and impressions of the destination's natural beauty, cultural richness, service quality, and tourist appeal. Destination image is widely recognized as a critical construct that influences tourists' decision-making processes, destination choices, post-travel evaluations, and future behaviours (Baloglu and McCleary, 1999; Stylos *et al.*, 2016; Zhang *et al.*, 2016). Destinations can vary widely, ranging from a city or rural area to a region or even an entire country. When the destination encompasses an entire country, the country/national image can become a significant factor affecting the destination image perceived by international tourists, as well as their destination choice (Nadeau *et al.*, 2008; Zhang *et al.*, 2016). Within this scope, the following hypothesis can be proposed for the current research:

H1. There is a significant and positive relationship between country image and destination image.

2.2.2 Perceived image and memorable tourism experience

Tourist experiences form the core of the tourism and hospitality industry. With intensifying competition, it is increasingly recognized that destinations need to create and deliver memorable tourism experiences for their consumers to enhance their competitive strength (Neuhofer *et al.*, 2012; 2015). A memorable tourism experience is a unique and satisfying travel experience that exceeds a tourist's expectations, leaving emotional and cognitive impressions that are remembered for a long time. It is argued that country image and destination image are significant antecedents of memorable tourism experiences (Zhang *et al.*, 2018). When tourists have a more positively influenced perception of the destination and the country it belongs to (for example, friendly people, beautiful natural landscapes), they are more likely to feel that they will gain a memorable tourism experience, which in turn leads to higher intentions to revisit and recommend the destination. In this context, it can be proposed that there is a strong relationship between country image, destination image, and memorable tourism experiences. Furthermore, it can be argued that destination image mediates the relationship between country image and memorable tourism experiences. This would be a logical assertion. Considering the above discussions, the following hypotheses have been developed.

H2. There is a significant and positive relationship between country image and memorable tourism experience.

H3. There is a significant and positive relationship between destination image and memorable tourism experience.

H4. Destination image mediates the relationship between country image and memorable tourism experience.

2.2.3 Memorable tourism experience and future behaviours

Recent attention has been drawn to memorable tourism experiences by researchers and practitioners alike. Memorable tourism experiences are the best predictors of future behaviours (Kladou *et al.*, 2022). Past experiences can serve as a valuable source of information for future decisions (Kim, 2014). Past experiences significantly influence tourists' future behavioural intentions, such as revisiting a destination and recommending it to others (Ozen, 2017). Tourists who are happy and satisfied with their past tourism experiences are likely to recommend the product and region from which the experience was gained and show a willingness to revisit the area (Yoon and Uysal, 2005). Within this scope, the following hypothesis can be proposed for the current research:

H5: There is a significant and positive relationship between memorable tourism experience and future behavioural intentions.

3. Method

3.1 Sample and Procedure

Data was collected from foreign tourists participating in balloon tours in Cappadocia, Türkiye. In July and August 2024, questionnaires were distributed by a three-person research team to foreign tourists who agreed to participate in the study. The questionnaires filled out by 820 foreign tourists who consented to participate were meticulously examined, and those deemed unsuitable for analysis were removed from the dataset. As a result, 764 usable questionnaires were collected.

Most respondents are male, accounting for 58.9%. In terms of age distribution, 4.6% of respondents are in the 18-25 age range, 26.6% are aged 26-35, 25% are in the 36-45 age range, 21.1% are aged 46-55, and 22.8% are 56 years old and above. 62.4% of the respondents are married, while 37.6% are single. Most respondents have a university education (58.6%), while 22.9% have a high school education, 12.6% have completed elementary or middle school, and 5.9% hold a master's or doctoral degree. 44.8% of the respondents are salaried employees in an organization, while 28.4% are self-employed. Additionally, 9.8% hold employer positions. Among the participants, 17% are not currently working (including retirees, students, and the unemployed).

3.2 Measurements of Variables

The current study employed a 5-point Likert scale (1 = strongly disagree, 5 = strongly agree). Country image was measured using a scale adapted from previous studies and utilized in the study by Zhang *et al.* (2018). The scale comprises two dimensions (country characteristics and country competence) and includes eight items. Destination image was measured using a scale adapted from previous studies and utilized in the study by Zhang *et al.* (2018). This scale consists of three dimensions (natural attractions, cultural attractions, and tourism facilities) and includes 11 items. Memorable tourism experience was measured with a scale adapted from previous studies and used in Bertan's (2020) study. This scale includes three dimensions (happiness, satisfaction, and spending) and comprises 11 items. Future behavioural intentions were measured using a scale adapted from previous studies and employed in the studies by Huang and Hsu (2009) and Al-Ansi *et al.* (2019). This scale consists of two dimensions (revisit intention and recommendation intention) and includes seven items. All variables included in the analysis (country image, destination image, memorable tourism experience, and future behavioural intentions) consist of reflective constructs (Dogan, 2019).

3.3 Data Analysis

Partial Least Squares Structural Equation Modelling (PLS-SEM) was used for data analysis (Hair *et al.*, 2017; Usakli and Kucukergin, 2018; Dogan, 2019; Yıldız, 2020). PLS-SEM was preferred as it performs well with small sample sizes and can analyse data that does not follow a normal distribution (Dogan, 2019). Smart PLS 4 was used for the analyses.

3.4 Common Method Bias

Harman's single-factor test was used to detect common method bias. This test is one of the most used techniques for identifying common method bias (Fuller *et al.*, 2016; Podsakoff *et al.*, 2003). Harman's test for exploratory factor analysis suggests that common method bias is present when the unrotated solution (including all measured items) produces a factor that explains more than 50% of the variance (Fuller *et al.*, 2016). In the current study, according to the result of Harman's exploratory factor analysis test, the variance explained by a single factor is 45.374%. This result indicates that there is no issue of common method bias in the study.

4. Results

4.1 Outer Model

In the PLS-SEM results, the outer model was evaluated first, using only reflective measurement in the model. This means that the outer model was assessed according to reflective model evaluation criteria. To determine indicator (item) reliability, outer loadings were examined (Kucukergin and Gurlek, 2020). In PLS-SEM-based analysis methods, factor loadings should ideally range between 0.700 and 0.900 (Chin, 1998). However, values above 0.600 can also be considered acceptable (Hair *et al.*, 2017). Additionally, Hair *et al.* (2017) recommend removing indicators with factor loadings between 0.400 and 0.700 only if their removal improves the composite reliability (CR) or average variance extracted (AVE) values. Accordingly, items with factor loadings below 0.400 were directly excluded from the scales, while those with loadings between 0.400 and 0.600 were examined individually. As a result, four items were removed from the scales due to factor loadings below 0.600, which caused the AVE, CR, and Cronbach's alpha values to fall below acceptable levels: one item from the country image scale and three items from the destination image scale. The remaining 33 items were found to be statistically significant ($p < 0.01$) in the resampling analysis (PLS Bootstrapping). Following the adjustments, the Cronbach's alpha and CR values exceeded 0.70, indicating that the scales possessed adequate reliability (Dogan, 2019). This finding suggests acceptable internal consistency (Hair *et al.*, 2017). For convergent validity, AVE results were also examined, and all scales showed AVE values above 0.50 (Dogan, 2019). Consequently, convergent validity was also achieved. The results of all analyses are presented in Table 1. To evaluate the discriminant validity of the outer model, the Fornell-Larcker criterion (Hair *et al.*, 2017) and the Heterotrait-Monotrait (HTMT) ratio of correlations were used (Kucukergin and Gurlek, 2020). Discriminant validity was established, as the Fornell-Larcker values for each construct were higher than their inter-construct correlations, and the HTMT values remained below the threshold of 0.90 (Wong, 2013; Henseler *et al.*, 2015).

Table 1: Outer Model Findings

Items	Factor Loadings	Cronbach Alpha	CR	AVE
Country image		.905	.905	.579
<i>Country characteristics</i>		.890	.891	.672
Türkiye is politically stable	.859			
Türkiye is a democratic country	.810			
Türkiye plays an important role in world politics	.758			
Türkiye can affect the international affairs	.848			
<i>Country competence</i>		.889	.892	.734
Türkiye is a wealthy country	.948			
Türkiye has advanced economy	.830			
There is a high level of modernization in Türkiye	.783			
Destination image		.896	.895	.521
<i>Natural attractions</i>		.888	.890	.620
Cappadocia has a good natural environment	.840			
Cappadocia is clean	.818			
The environment is not polluted in Cappadocia	.774			
Cappadocia has beautiful natural landscape	.814			

Items	Factor Loadings	Cronbach Alpha	CR	AVE
Cappadocia has a variety of outdoor activities	.679			
<i>Cultural attractions</i>		.926	.927	.808
Cappadocia has many historical and cultural heritages	.910			
Cappadocia has unique lifestyle and custom	.840			
Cappadocia's historical culture is unique	.945			
<i>Memorable tourism experience</i>		.940	.941	.592
<i>Happiness</i>		.935	.935	.784
I am happy since balloon ride experience makes me feel better	.891			
Balloon ride experience which stimulated my senses within social interaction was fun	.852			
Time flew by in the balloon ride experience as a leisure time activity	.889			
I am happy to have participated in the balloon ride experience	.908			
<i>Satisfaction</i>		.854	.854	.594
My skills have developed thanks to the balloon ride experience	.799			
I am satisfied with my balloon ride experience since my expectations were met	.770			
Balloon ride experience enriched my life	.775			
Balloon ride experience increased my participation in tourism activities	.738			
<i>Spending</i>		.847	.850	.655
When I have extra money, I would spend it for balloon ride experience since it provides the opportunity to get to know the region	.843			
I would prefer to spend more money for more complicated/integrated air sports experience	.704			
I would seek more information to participate in balloon ride experience	.871			
<i>Future behavioural intentions</i>		.939	.939	.687
<i>Revisit intention</i>		.913	.914	.727
I intend to revisit this region for balloon ride in the next 2 years	.813			
I plan to revisit this region for balloon ride in the next 2 years	.847			
I desire to revisit this region for balloon ride in the next 2 years	.877			
I probably will revisit this region for balloon ride in the next 2 years	.873			
<i>Recommend intention</i>		.867	.867	.686
I will recommend others to join the balloon ride	.799			
I will say positive things to others about the balloon ride	.883			
I will encourage my friends and relatives to join the balloon ride	.801			

Note. SRMR: 0.093

4.2 Inner Model

Since all requirements for the outer model were met, the evaluation of the inner model can proceed. The assessment of the inner model followed the method recommended in the literature (Hair *et al.*, 2017; Usakli and Kucukergin, 2018; Dogan, 2019; Yıldız, 2020). First, a multicollinearity analysis (VIF) was conducted, and no issues related to multicollinearity were observed, as none of the values exceeded 5 (Hair *et al.*, 2017). In the evaluation of R^2 , values of 0.75, 0.50, and 0.25 were interpreted as substantial, moderate, and weak, respectively (Hair *et al.*, 2011; Dogan, 2019). Accordingly, it was observed that the endogenous variables—destination image (0.758), memorable tourism experience (0.826), and future behavioural intentions (0.820)—demonstrated substantial R^2 levels (Table 2). The f^2 statistic was used to assess the effect of the independent variable on the R^2 value. f^2 is classified as small, medium, and large with values of 0.02, 0.15, and 0.35,

respectively (Cohen, 1992). The memorable tourism experience has an f^2 value of 4.312, which is considerably high. The destination image f^2 value is 0.502, indicating a large effect. The f^2 values for country image are 2.912 and 0.167, representing large and medium effects, respectively.

According to the findings, country image has a strong positive effect on destination image ($\beta=0.86$, $t=71.976$, $p<0.01$, $f^2=2.912$). Additionally, country image positively influences memorable tourism experience ($\beta=0.34$, $t=7.018$, $p<0.01$, $f^2=0.167$). Destination image also has a positive effect on memorable tourism experience ($\beta=0.60$, $t=12.951$, $p<0.01$, $f^2=0.502$). Furthermore, destination image mediates the effect of country image on memorable tourism experience ($\beta=0.52$, $t=12.684$, $p<0.01$). Finally, memorable tourism experience has a strong positive effect on future behavioural intentions ($\beta=0.89$, $t=66.672$, $p<0.01$, $f^2=4.312$). Consequently, all hypotheses were supported.

Table 2: Inner Model Findings

Hypotheses	Effects	Path Coefficients	Results	VIF	f^2
H1	CI-DI	0.86 [0.84; 0.88]	Supported	1.073	2.912
H2	CI-MTE	0.34 [0.24; 0.44]	Supported	4.199	0.167
H3	DI-MTE	0.60 [0.51;0.69]	Supported	4.164	0.502
H4	CI>DI>MTE	0.52 [0.44;0.60]	Supported		
H5	MTE-FBI	0.89 [0.86;0.91]	Supported	1.039	4.312

Note. CI: country image, DI: destination image, MTE: memorable tourism experience, FBI: future behavioural intentions, DI adjusted R^2 : 0.758, MTE adjusted R^2 : 0.826, FBI adjusted R^2 : 0.820, SRMR: 0.093

5. Discussion

Memorable tourism experience, destination image, and country image are considered significant antecedents of future behaviours. However, an integrated model is lacking to examine their relationships and reveal the mechanisms through which these constructs influence future behaviours. Researchers have called for further studies to validate the memorable tourism experience scale in new contexts. Empirical research examining the antecedents and outcomes of memorable tourism experiences remains insufficient (Zhang *et al.*, 2018). Additionally, studies exploring the impact of key constructs, such as country image and destination image, on memorable tourism experiences are limited. The present research helps fill this gap by proposing an integrated model to explore the relationships among country image, destination image, memorable tourism experience, revisit intention, and recommendation intention. This study has developed and aimed to validate a theoretical model focused on the antecedents and outcomes of memorable tourism experience to better define its nature. Moreover, it has demonstrated the role of memorable tourism experience, influenced by image, in explaining future behavioural intentions. The research findings support all hypotheses, thus validating the theoretical model. The results of the theoretical model can be summarized as shown in Figure 1. The validation of the developed theoretical model using data collected from tourists participating in hot-air balloon tours further enhances the significance of the present research. Indeed, studies addressing memorable tourism experiences specifically within balloon tourism are quite limited.

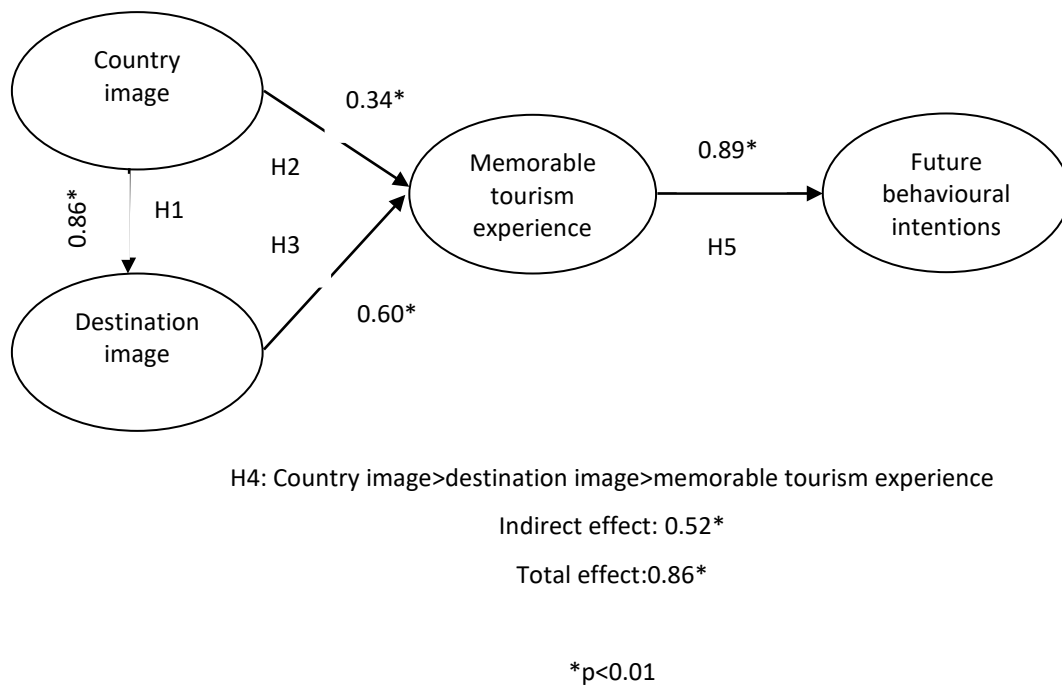


Figure 1: Theoretical Model

6. Conclusions

6.1 Theoretical Implications

This study, grounded in the TPB, makes a notable theoretical contribution by expanding the application of this framework to understand the determinants of future behavioural intentions, specifically in the context of hot-air balloon tourism. By examining the influence of country image on destination image and memorable tourism experiences, this research highlights how perceptions of a broader national context shape both specific destination evaluations and the quality of unique tourism experiences. Additionally, the study provides evidence for the mediating role of destination image in the relationship between country image and memorable tourism experience, underscoring the importance of integrated perceptions within the tourist decision-making process. The impact of memorable tourism experience on future behavioural intentions, such as revisit and recommendation intentions, aligns with the TPB's premise that favourable attitudes and meaningful past experiences significantly influence individuals' planned actions. This research enriches the theoretical understanding of how image perceptions and experiential quality jointly foster behavioural intentions in tourism, suggesting that cultivating positive images at both national and destination levels may be instrumental in enhancing memorable experiences and encouraging sustainable, repeat visitation behaviours.

6.2 Practical Implications

This study offers valuable practical insights for tourism practitioners, particularly those involved in hot-air balloon tourism, by underscoring the strategic importance of enhancing country and destination image to foster memorable tourism experiences and influence future behavioural intentions. The findings suggest that tourism managers and destination marketers should invest in building a strong, positive country image, as it indirectly affects tourists' experiences and perceptions at the destination level. By enhancing the destination's unique appeal and aligning it with the broader positive attributes of the country, practitioners can create a cohesive image that resonates with tourists, leading to more impactful, memorable experiences. Furthermore, recognizing the role of destination image as a mediator highlights the need for destinations to promote authentic, culturally rich, and unique aspects that distinguish them and reinforce the national brand. For hot-air balloon tourism specifically, operators and tourism boards might prioritize elements that heighten tourists' sensory and emotional engagement, as these are critical for memorable experiences. Given the strong influence of memorable tourism experiences on revisit and recommendation intentions, designing tour packages and experiences that exceed expectations can directly boost return visits and word-of-mouth

referrals. Implementing these strategic approaches can enhance customer loyalty, elevate the destination's profile, and contribute to the sustainable growth of the hot-air balloon tourism sector.

6.3 Limitations and Future Research Directions

This study's limitations and suggestions for future research can contribute to a broader contextual assessment of the findings. Firstly, conducting the research solely on foreign tourists participating in balloon tours in Cappadocia may limit the generalizability of the findings to other tourist regions or cultural contexts. Replicating similar studies in different destinations or among local tourist groups could strengthen the robustness of the findings.

In addition to the variables used in the model (country image, destination image, memorable tourism experience, and future behavioural intentions), future research could incorporate other variables to provide a more comprehensive perspective. For example, variables such as tourist motivations, perceived value, service quality, and tourist satisfaction could serve as important factors influencing the memorable tourism experience. Moreover, elements like social influence, cultural proximity, or perceptions of sustainability might also be considered as variables that could specifically affect tourists' behavioural intentions.

Finally, conducting longitudinal studies to examine how tourists' behavioural intentions evolve over time would provide a deeper understanding of the study's results. Such studies would be valuable for tracking the long-term impacts of memorable tourism experiences on revisit intentions and recommendation intentions. These limitations and suggestions provide a valuable foundation for broadening the scope of future research and enhancing the generalizability of the findings.

Disclosure Statement: No potential conflict of interest was reported by the author(s).

Data Availability Statement: The data that support the findings of this study are available on request from the corresponding author [Y. DÜNDAR].

References

- Ajzen, I. (1991), "The theory of planned behavior", *Organizational Behavior and Human Decision Processes*, Vol. 50 No. 2, pp. 179-211.
- Al-Ansi, A., Olya, H.G.T. and Han, H. (2019), "Effect of general risk on trust, satisfaction, and recommendation intention for halal food", *International Journal of Hospitality Management*, Vol. 83, pp. 210-219.
- Baloglu, S. and McCleary, K.W. (1999), "A model of destination image formation", *Annals of Tourism Research*, Vol. 26 No. 4, pp. 868-897.
- Bentley, T.A., Page, S.J. and Laird, I.S. (2001), "Accidents in the New Zealand adventure tourism industry", *Safety Science*, Vol. 38 No. 1, pp. 31-48.
- Bertan, S. (2020), "Key success factors for doing business in hot air balloon riding", *Journal of Tourism and Services*, Vol. 11 No. 20, pp. 124-131.
- Bigné, J.E., Sánchez, M.I. and Andreu, L. (2009), "The role of variety seeking in short and long run revisit intentions in holiday destinations", *International Journal of Culture, Tourism and Hospitality Research*, Vol. 3 No. 2, pp. 103-115.
- Chandralal, L., Rindfleisch, J. and Valenzuela, F. (2015), "An application of travel blog narratives to explore memorable tourism experiences", *Asia Pacific Journal of Tourism Research*, Vol. 20 No. 6, pp. 680 -693.
- Chen, C. F. and Tsai, D. (2007), "How destination image and evaluative factors affect behavioral intentions?", *Tourism Management*, Vol. 28 No. 4, pp. 1115-1122.
- Chin, W.W. (1998), "The partial least squares approach for structural equation modelling", Marcoulides, G.A. (Ed.), *Modern Methods for Business Research*, Lawrence Erlbaum Associates Publishers, New Jersey, pp. 295-336.
- Cloke, P. and Perkins, H.C. (2002), "Commodification and adventure in New Zealand tourism", *Current Issues in Tourism*, Vol. 5 No. 6, pp. 521-549.
- Cohen, J. (1992), "Quantitative methods in psychology", *Psychological Bulletin*, Vol. 112 No. 1, pp. 155-159.
- Directorate General of Civil Aviation. (2024), "Balloon operations and flight statistics", available at: <https://web.shgm.gov.tr/tr/arama?searchkey=balon> (accessed 20 October 2024)
- Dogan, D. (2019), *Data Analysis with SmartPLS*, Zet Publications, Ankara.
- Fuller, C.M., Simmering, M.J., Atinc, G., Atinc, Y. and Babin, B.J. (2016), "Common methods variance detection in business research", *Journal of Business Research*, Vol. 69 No. 8, pp. 3192-3198.
- Hair, J.F., Hult, G.T.M., Ringle, C.M. and Sarstedt, M. (2017), *A Primer on Partial Least Squares Structural Equation Modeling (PLS-SEM)* (2nd ed.), Sage, Thousand Oaks, CA.
- Hair, J.F., Ringle, C.M. and Sarstedt, M. (2011), "PLS-SEM: Indeed a silver bullet", *Journal of Marketing Theory and Practice*, Vol. 19 No. 2, pp. 139-152.
- Henseler, J., Ringle, C.M. and Sarstedt, M. (2015), "A new criterion for assessing discriminant validity in variance-based structural equation modelling", *Journal of the Academy of Marketing Science*, Vol. 43 No. 1, pp. 115-135.

- Huang, S. and Hsu, C.H.C. (2009), "Effects of travel motivation, past experience, perceived constraint, and attitude on revisit intention", *Journal of Travel Research*, Vol. 48 No. 1, pp. 29-44.
- Kim, J.H., Ritchie, J.R.B. and McCormick, B. (2012), "Development of a scale to measure memorable tourism experiences", *Journal of Travel Research*, Vol. 51 No. 1, pp. 12-25.
- Kim, J.H. (2014), "The antecedents of memorable tourism experiences: the development of a scale to measure the destination attributes associated with memorable experiences", *Tourism Management*, Vol. 44, pp. 34-45.
- Kladou, S., Rigopoulou, I., Kavaratzis, M. and Salonika, E. (2022), "A memorable tourism experience and its effect on country image", *Anatolia-International Journal of Tourism and Hospitality Research*, Vol. 33 No. 3, pp. 439-450.
- Kucukergin, K.G. and Gurlek, M. (2020), "'What if this is my last chance?': Developing a last chance tourism motivation model", *Journal of Destination Marketing & Management*, Vol. 18, p. 100491.
- Lam, T. and Hsu, C. H. (2004), "Theory of planned behavior: Potential travelers from China", *Journal of Hospitality & Tourism Research*, Vol. 28 No. 4, pp. 463-482.
- McKay, T. (2013), "Adventure tourism: opportunities and management challenges for SADC destinations", *Acta Academica*, Vol. 45 No. 3, pp. 30-62.
- Nadeau, J., Heslop, L., O'Reilly, N. and Luk, P. (2008), "Destination in a country image context", *Annals of Tourism Research*, Vol. 35 No. 1, pp. 84-106.
- Neuhofer, B., Buhalis, D. and Ladkin, A. (2014), "A typology of technology-enhanced tourism experiences", *International Journal of Tourism Research*, Vol. 16 No. 4, pp. 340-350.
- Neuhofer, B., Buhalis, D. and Ladkin, A. (2012), "Conceptualising technology enhanced destination experiences", *Journal of Destination Marketing & Management*, Vol. 1, pp. 36-46.
- Neuhofer, B., Buhalis, D. and Ladkin, A. (2015), "Smart technologies for personalized experiences: A case study in the hospitality domain", *Electronic Markets*, Vol. 25 No. 3, pp. 243-254.
- Nevsehir Investment Support Office. (2017), "Hot-air balloon industry report", available at: https://www.ahika.gov.tr/assets/upload/dosyalar/ahika_2017_nevsehir-sicak-hava-balonu_sektor-raporu.pdf (accessed 20 October 2024)
- Novotna, M., Frantal, B., Kunc, J. and Kubickova, H. (2019), "Special interest tourism in the Czech Republic: introduction and overview", *Czech Journal of Tourism*, Vol. 8 No. 1, pp. 49-63.
- Novotna, M., Kubickova, H. and Kunc, J. (2021), "Outdoor excitement in homeland? Opportunities and threats to balloon tourism in the Czech Republic during the coronavirus outbreak", *Journal of Outdoor Recreation and Tourism-Research Planning and Management*, Vol. 36.
- Ozen, I.A. (2017), *The Relationship Between Experiential Consumption, Destination Image Perception and Behavioural Outcomes: Cappadocia Hot-Air Balloon Experience*, Nevsehir Hacı Bektas Veli University, Nevsehir, Türkiye.
- Podsakoff, P. M., MacKenzie, S. B., Lee, J. Y. and Podsakoff, N. P. (2003), "Common method biases in behavioral research: A critical review of the literature and recommended remedies", *Journal of Applied Psychology*, Vol. 88 No. 5, pp. 879-903.
- Quinlan, C. and Carmichael, B. (2010), "The dimensions of the tourist experience", Morgan, M., Lugosi, P. and Ritchie, B. (Eds.), *The Tourism and Leisure Experience: Consumer and Managerial Perspectives*, Channel View Publications, Bristol, pp. 3-26.
- Robinson, M. and Novelli, M. (2005), "Niche tourism: an introduction", Novelli, M. (Ed.), *Niche Tourism: Contemporary Issues, Trends and Cases*, Routledge, London, pp. 1-11.
- Stylos, N., Vassiliadis, C. A., Bellou, V. and Andronikidis, A. (2016), "Destination images, holistic images and personal normative beliefs: Predictors of intention to revisit a destination", *Tourism Management*, Vol. 53, pp. 40-60.
- Usakli, A. and Kucukergin, K.G. (2018), "Using partial least squares structural equation modeling in hospitality and tourism: Do researchers follow practical guidelines?", *International Journal of Contemporary Hospitality Management*, Vol. 30 No. 11, pp. 3462-3512.
- Wong, K.K. (2013), "Partial least squares structural equation modeling (PLS-SEM) techniques using SmartPLS", *Marketing Bulletin*, Vol. 24 No. 1, pp. 1-32.
- Yıldız, E. (2020), *Structural Equation Modelling with SmartPLS*, Seckin Publishing, Ankara.
- Yoon, Y. and Uysal, M. (2005), "An examination of the effects of motivation and satisfaction on destination loyalty: a structural model", *Tourism Management*, Vol. 26 No. 1, pp. 45-56.
- Zhang, H. M., Wu, Y. and Buhalis, D. (2018), "A model of perceived image, memorable tourism experiences and revisit intention", *Journal of Destination & Marketing*, Vol. 8, pp. 326-336.
- Zhang, H.M., Xu, F.F., Leung, H.H. and Cai, L. P. (2016), "The influence of destination-country image on prospective tourists' visit intention: Testing three competing models", *Asia Pacific Journal of Tourism Research*, Vol. 21 No. 7, pp. 811-835.

Participatory Governance: Providing Tools for Local Communities to Engage in Tourism Management

Patrícia Esteves¹, Dora Gomes¹, Alexandra Lavaredas¹ and Paulo Almeida²

¹Polytechnic University of Leiria, Portugal/ Projeto FAST – Agenda ATT – PRR, Portugal

²CITUR-Polytechnic University of Leiria, Portugal/Projeto FAST – Agenda ATT – PRR, Portugal

patricia.g.esteves@ipleiria.pt

dora.f.gomes@ipleiria.pt

alexandra.lavaredas@ipleiria.pt

palmeida@ipleiria.pt

Abstract: The participation of local communities in decision-making and governance processes is critical to achieve sustainable management of tourist destinations, particularly as anti-tourism protests continue to emerge across Europe. Despite this, many destinations rely on traditional tourism management models that lack consultation mechanisms, often neglecting the needs and concerns of residents. Additionally, Destination Management Organizations (DMOs) frequently fail to provide effective channels, platforms, or processes for local stakeholders to offer feedback and contribute with suggestions. This study seeks to address these challenges by identifying tools and strategies that promote active engagement of local communities in tourism management. Drawing on a literature review of participatory governance, the results present a comprehensive overview of tools and processes that enable active community engagement in the governance and management of tourism destinations. The findings also underscore the importance of integrating community voices into decision-making processes to enhance the sustainability, equity, and resilience of tourism destinations. Theoretically, this study lays a foundation for further exploration of tools designed to enhance community participation in governance and encourages reflection on how participatory governance can be effectively operationalized to balance the needs of local communities with the demands of the tourism industry. From a practical perspective, the findings emphasize the importance of integrating participatory governance into the operational frameworks of DMOs. Such integration not only enhances resident satisfaction, creating a more welcoming environment for tourists, but also attracts visitors in a more sustainable manner.

Keywords: Participatory governance, Tourism management, Local community, Sustainability

1. Introduction

Tourism destinations increasingly face multifaceted challenges associated with sustainability, overtourism, and community dissatisfaction. The growing prevalence of anti-tourism protests across various regions highlights the critical need for governance frameworks that actively integrate the perspectives and participation of local communities (Li et al., 2023; González-Reverté and Guix, 2024). Participatory governance, which emphasizes collaboration among stakeholders—including residents, local authorities, and businesses—has emerged as a promising approach to address these challenges. By fostering inclusive decision-making processes, participatory governance aligns tourism management strategies with local priorities, safeguards cultural heritage, and supports the long-term resilience of destinations (Presenza et al., 2013).

Despite its potential, many tourism destinations continue to rely on traditional, hierarchical management models that inadequately incorporate community input. Destination Management Organizations (DMOs), which play a central role in coordinating tourism activities, often lack effective mechanisms to facilitate stakeholder engagement. Consequently, management strategies frequently fail to address the needs and concerns of local residents, exacerbating tensions between host communities and the tourism sector. This disconnect hampers the adoption of sustainable practices, fosters community dissatisfaction, and perpetuates exclusion and conflict.

Unfortunately, few studies have explored how different tools for local community participation in tourism management can be effectively combined, as evidenced by the limited number of articles on co-creative governance tools. This gap is significant since these tools are rarely used in isolation, and their integration enhances inclusivity, representativeness, and process efficiency. Therefore, this study investigates participatory governance as a framework to address these challenges and promote inclusive and sustainable tourism management. Through an analysis of tools and strategies designed to enable active community involvement, the research aims to identify practical approaches for integrating local voices into governance processes. Furthermore, it explores the potential of participatory governance to enhance resident satisfaction, mitigate conflicts, and support the sustainable development of tourism destinations. In doing so, this research

contributes to the expanding academic discourse advocating for more inclusive, community-centred governance models in the tourism sector.

This paper is organized into five sections. Following the introduction, which provides a concise overview of the research topic, a comprehensive review of the existing literature is presented to establish the study's theoretical foundation. The methodology section details the research design and procedures employed to conduct the investigation. The results section identifies the various tools presented by the authors in the selected articles for this review. Finally, the conclusion synthesizes the primary findings from the literature review and discusses their implications for current practices and future research endeavours.

2. Literature Review

2.1 Governance and Participatory Governance

Governance can be defined as a structured process of collective coordination among diverse actors such as entrepreneurs, local associations, individuals, government entities, and consumers among others, with the objective to guide, direct, control, or manage a territory, project, or network to achieve common and mutually beneficial goals (Torres-Salcido and Sanz-Canada, 2018). In other words, governance encompasses the interactions between structures, processes, and traditions that shape how responsibilities are carried out, decisions are made, and stakeholder perspectives are incorporated into decision-making. It is a dynamic system that ensures the participation of citizens and interest groups in shaping outcomes.

Unlike traditional hierarchical or top-down approaches, governance emphasizes horizontal or bottom-up strategies, fostering greater collaboration and inclusivity among stakeholders (Escobedo et al., 2021). Likewise, in tourism spaces, governance focuses on managing destinations through the synergistic and coordinated efforts of diverse stakeholders. These include governments at various levels, local communities, civil society, and businesses. Effective tourism governance involves creating spaces for reflection which serves as a critical tool for fostering informed decision-making while promoting inclusivity and stakeholder engagement, ensuring active participation by all actors (Presenza et al., 2013).

Participatory governance can improve the quality of democracy as well as outcomes for local communities. For Voorberg et al. (2014) participatory governance achieves deepen local communities' democratic engagement in the governmental processes, by placing residents at the centre of grassroots social innovation by actively participating in debates related to sociocultural, political, economic and environmental issues. Priambodo et al. (2023) address the concept of Penta helix, which consists of the collaboration of five stakeholder elements: government, business actors, academics, local communities and the media. According to these authors, the government provides the policies and regulations; business actors provide input regarding the market trends and the needs of consumers; academics provide relevant concepts and theories based on the studies. The involvement of multiple stakeholders in a tourist destination reduces conflicts and creates a shared sense of responsibility for tourism (Alfiandri et al., 2024; Reina-Usuga et al., 2024).

Participatory governance can also help respond to the challenges of overtourism (González-Reverté and Guix, 2024; Horgan and Koens, 2024) as it allows tourism to be more aligned with the needs of local communities. Finally, for participatory governance to have a true impact, decision makers need to create different processes, like channels and feedback loops, to make planning systems more open and honest (Horgan and Koens, 2024). Ramukumba (2021) also highlights that repeated requests for participation without effective execution can lead to consultation exhaustion for stakeholders and residents, which reduces their incentives to engage.

2.2 Participation of Local Communities

Destination Management Organizations (DMOs) often implement measures aimed at attracting increasing numbers of visitors, but these strategies can inadvertently contribute to unsustainable tourism practices. Overcrowding, rising living costs, and environmental degradation are common consequences in popular tourist destinations (Zenker et al., 2017). These adverse impacts frequently strain the relationship between residents and visitors, particularly when economic interests overshadow community well-being (Gössling et al., 2020). To foster a sustainable tourism environment, it is crucial to include local communities in destination planning and management strategies, ensuring that their needs and aspirations are central to the development process (Chen and Dwyer, 2018). However, despite the recognized importance of community involvement, significant barriers hinder meaningful participation. Challenges such as limited time, awareness, access to decision-making processes, and knowledge about tourism governance often exclude residents from fully engaging (Erdmenger, 2022). This exclusion can lead to dissatisfaction and a sense of powerlessness, as residents feel

deserted in decisions that directly affect their quality of life (Paredes-Rodriguez and Spierings, 2020). Even when residents are invited to contribute to strategic discussions, their involvement can be superficial. True participation requires empowering communities to define their own development goals and priorities, rather than merely consulting them on predefined plans (Brooks et al., 2023).

Effective community participation requires more than just consultation; it demands active and equitable involvement in governance processes. Residents must play a central role in decision-making, gaining control over resources and programs resulting from tourism (Brooks et al., 2023). Open dialogue with residents is essential to identify and address the challenges and opportunities arising from tourism development (Fernández et al., 2024). Active community participation ensures that tourism initiatives not only benefit local populations but also align with their values and long-term aspirations (Adebayo and Butcher, 2023). Community-driven initiatives can foster a sense of ownership, raise awareness about conservation, and promote discussions about sustainable practices (Adebayo and Butcher, 2023; Brooks et al., 2023; Li et al., 2023). Models of successful community participation prioritize collaborative policymaking and capacity-building efforts that respect local knowledge and expertise (Coscarello and Manella, 2024). Engaging residents in participatory governance processes ensures that tourism strategies are relevant, sustainable, and beneficial to those who live in the area. For example, Barcelona's establishment of a Tourism Council in 2016 aimed to enhance resident participation and address mounting tensions related to tourism. This council facilitates dialogue between stakeholders, including DMOs, and focuses on sustainable tourism development. Its responsibilities include advising the municipal government on tourism policies, proposing sustainability initiatives, and conducting urban tourism studies (Paredes-Rodriguez and Spierings, 2020). This structured approach demonstrates how inclusive governance mechanisms can address community concerns and foster more sustainable tourism practices.

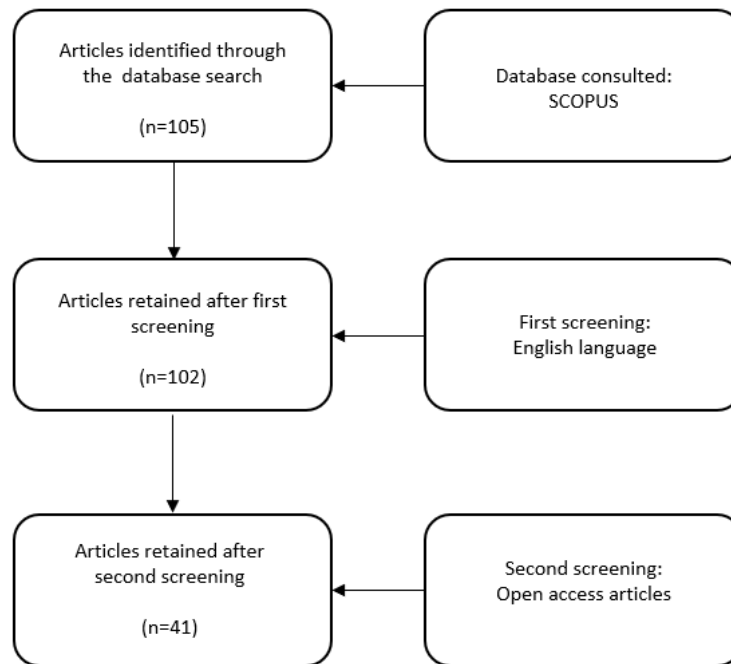
In various regions, Local Government Tourism Committees (LGTCS) also play a crucial role by decentralizing decision-making and transferring authority to local bodies (Adebayo and Butcher, 2023). These committees ensure that community voices are integrated into tourism planning, providing a platform to address negative impacts and align initiatives with local needs. Establishing participatory frameworks that empower communities politically, socially, and economically is essential for equitable tourism development. Political empowerment allows residents to set their own development agendas, while socio-economic empowerment creates opportunities for local employment and entrepreneurship (Adebayo and Butcher, 2023).

It is important that different participation tools and mechanisms are used to encourage local community involvement, to achieve equity, efficiency and a high degree of residents' involvement (Presenza et al., 2013). There are several participation mechanisms, such as focus groups (Presenza et al., 2013; Cruz Portorreal et al., 2024), surveys (Sugimoto et al., 2022) or workshops (Muurmans et al., 2016; Cruz Portorreal et al., 2024; Carvalho Ribeiro et al., 2024). Thees et al. (2020) also highlight Living Labs as a tool to promote the participation of local communities, as they promote joint problematization and participatory experimentation with stakeholders, the co-creation and the support for more local solutions. Participatory governance, through its participation tools and methodologies, has the potential to better meet the needs of local communities, to contribute to innovation and sustainable development of a tourist destination; however, its implementation still faces some challenges such as the underrepresentation of local communities in decision-making processes and the difficulty of articulating the perspectives of residents and various stakeholders (Carvalho Ribeiro et al., 2024).

3. Methodology

3.1 Data Collection

To identify all relevant publications, the research followed the PRISMA protocol which provides guidelines for the review process (Moher et al., 2015). The search was performed in the SCOPUS database because of the wide range and high quality of peer-reviewed journals available. For the identification phase it was used the search string - "local community*" AND "particip*" AND "governance" AND "tourism" - in the SCOPUS database. The initial number of articles retrieved was 105 (Figure 1). Then, only open access articles were selected, after selecting English as the only language, resulting in a final data sample of 41 articles for this review.



Source: Own elaboration

Figure 1: The process of article selection

3.2 Characterization of the Sample

The articles selected for this review predominantly utilized qualitative methodologies (22 articles). Furthermore, 15 articles adopted a mixed-methods approach, combining both qualitative and quantitative methods, while three employed quantitative methodologies and one was a conceptual article. The document types included in this review comprise 32 articles, 5 conference papers, 2 book chapters, and 2 reviews. The body of literature on this topic has been relatively scarce. The table 1 presents the publication date of the articles included in this review, making it possible to observe a growing trend of publications over time, which demonstrates a increasing academic interest in the topic in recent years. The highest numbers of published papers in this area, were in 2024 (9 articles), in 2023 (7 articles) and in 2021 (6 articles).

Table 1: Publishing dates of the articles

Year	2001	2010	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Number of articles	1	1	3	1	1	3	1	3	1	1	6	3	7	9

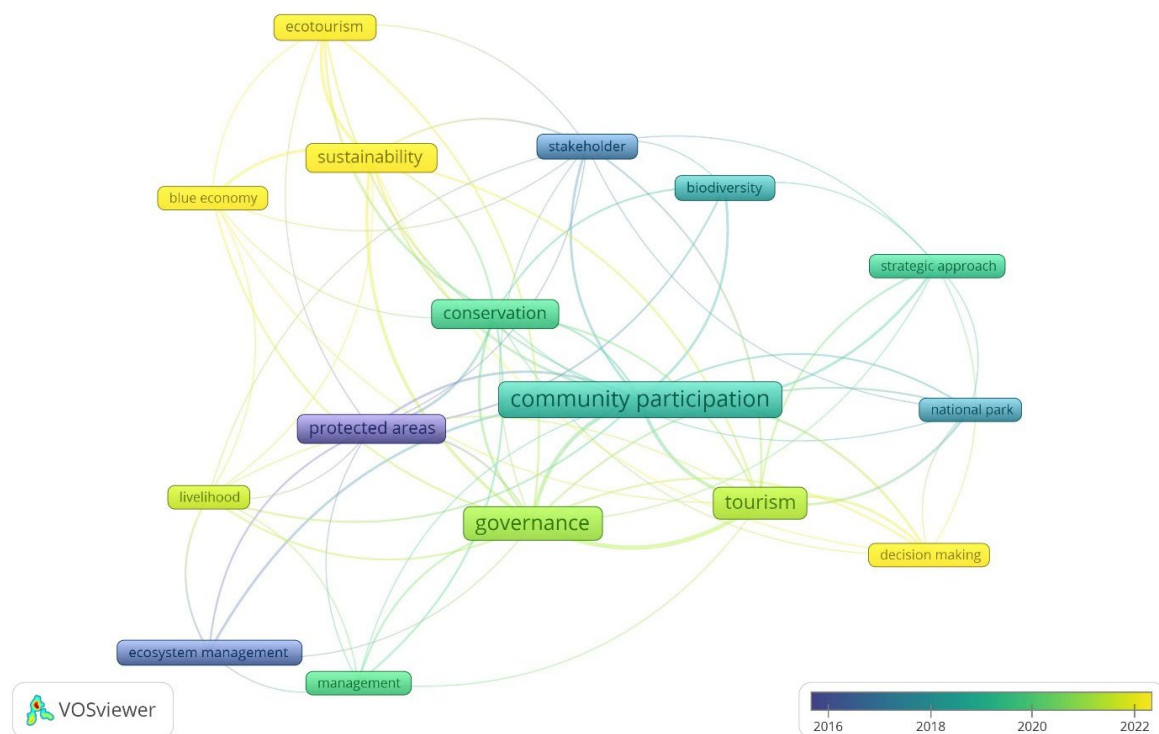
Source: Own elaboration

The co-occurrence of keywords was also analysed by aggregating all relevant papers using the software VOSviewer (Figure 2). This analysis resulted in the identification of clusters that provide valuable insights into the primary topics and research areas within the examined body of literature. These clusters facilitate the understanding of research trends, highlight areas of specialization, and reveal connections among various concepts within the field of study.

As illustrated in Figure 2, the term "community participation" has emerged as a significant research focus primarily after 2019, indicating its recent and growing relevance. This concept is strongly associated with keywords such as "biodiversity," "conservation," "ecosystem management," "livelihood," "management," and "protected areas" (Cluster 1). Notably, research related to this theme has been present since 2001, initially emphasizing "protected areas" and "ecosystem management." Over time, this focus has evolved to incorporate broader concerns regarding sustainability—a concept that has gained increasing prominence in contemporary research.

Further exploration of Cluster 1 highlights its focus on biodiversity while maintaining a strong connection to local communities for biodiversity preservation, which demonstrates the vital role that resident involvement plays in the success of the conservation efforts. Additional significant keywords identified in this co-occurrence analysis include "decision making," "governance," "national park," "strategic approach," and "tourism" (Cluster 2), as well as "blue economy," "ecotourism," "stakeholders," and "sustainability" (Cluster 3).

The analysis underscores three principal concepts in this study: "community participation," "governance," and "tourism." Among these, "community participation" exhibits connections to nearly every keyword on the map, with the exception of "blue economy," underscoring its centrality and broad interdisciplinary relevance. Similarly, "governance" connects with nearly all identified keywords except "biodiversity." "Tourism," meanwhile, demonstrates associations with multiple key terms, including "community participation" and keywords from its cluster, but also "management," "livelihood," and "conservation" from cluster 1 as well as Cluster 3 terms like "blue economy," "sustainability," and "stakeholders." This reflects the multidisciplinary nature of tourism research. Collectively, these clusters reveal the interconnectedness of the three main research areas and underscore the necessity for further studies aimed at their integrated development. This interrelation highlights the dynamic interplay among community engagement, governance structures, and tourism strategies in achieving sustainable outcomes.



Source: Own elaboration

Figure 2: Co-keywords map

4. Results

Participatory governance is essential for sustainable tourism development (Brooks et al., 2023). The inclusion of local communities in decision-making processes, from diagnosis to the formulation of tourism policies (Fernández et al., 2024) allows their needs to be taken into account, their voices to be heard, as well as it allows to promote a sense of belonging. It is important that a horizontal, bottom-up approach is promoted, rather than a hierarchical one, so that communities feel integrated in local tourism decisions and management (Reina-Usuga et al., 2024).

There are several tools and mechanisms that promote the participation of local communities in the governance of a tourist destination. The table 2 presents some of the tools and mechanisms presented by the authors studied. Despite the limited number of articles, valuable insights were discovered.

Table 2: Tools and mechanisms for community participatory governance analysed by different authors

Tools and mechanisms	Authors
Focus Groups	Presenza et al. (2013); Cruz Portorreal et al. (2024)
Workshops	Daconto and Sherpa (2010); Malek and Costa (2015); Muurmans et al. (2016); Sugimoto et al. (2022); Carvalho Ribeiro et al. (2024); Cruz Portorreal et al. (2024)
Awareness and Education Programs	Muurmans et al. (2016); Chen et al. (2024); Cruz Portorreal et al. (2024)
Feedback Mechanisms	Alfiandri et al. (2024); Chen et al. (2024); Kim et al. (2024)
Public-Private Partnerships	Bollig (2016); Rey et al. (2017); Gonzalez-Morales et al. (2021); Salerno et al. (2023); Fernández et al. (2024)
Social Movements and Advocacy	Fernández et al. (2024); González-Reverté and Guix (2024)
Training and Capacity Building	Fabricius et al. (2001); Malek and Costa (2015); Hong and Saizen (2019); Poscente et al. (2022); Adebayo and Butcher (2023); Coscarello and Manella (2024)
Surveys	Sugimoto et al. (2022)
Regular Community Meetings and Information Sessions	Malek and Costa (2015); Hong and Saizen (2019); Poscente et al. (2022)
Living labs	Mehnen et al. (2023)
Local Action Groups (LAGs)	Salerno et al. (2023)
Local Government Tourism Committees (LGTCS)	Adebayo and Butcher (2023)

Source: Own elaboration

Presenza et al. (2013) and Cruz Portorreal et al. (2024) advocate focus groups as key tools for enabling local community participation in governance and planning. Presenza et al. (2013) argue that effective participation requires mechanisms like focus groups or surveys to ensure equitable, efficient resident engagement, stressing the importance of representing all relevant stakeholders, including community subgroups. They also identify barriers to resident involvement, such as limited funding, lack of technical knowledge, insufficient training, and community apathy. To address these, they recommend institutional support, DMO mediation, and appropriate tools to foster participation.

Workshops are an effective training tool that promotes discussion and collaboration and allows brainstorming sessions with residents across various domains, including protected area management, cultural development and environmental governance (Daconto and Sherpa, 2010; Malek and Costa, 2015; Muurmans et al., 2016; Sugimoto et al., 2022; Carvalho Ribeiro et al., 2024; Cruz Portorreal et al., 2024). In their study, Carvalho Ribeiro et al. (2024) organized workshops to develop land use scenarios around a protected area, involving multiple stakeholders and the local community, finding that the benefits of these workshops include fostering consensus in territorial planning and encouraging collaboration between different sectors. Malek and Costa (2015) demonstrated that workshops can also be used in cultural projects to involve residents in the planning and execution of events. However, Cruz Portorreal et al. (2024) pointed out that resident influence in workshops is sometimes limited, with participation often restricted to providing information rather than holding decision-making power.

Awareness and education programs are essential to raise awareness and educate residents, stakeholders and tourists (Muurmans et al., 2016; Chen et al., 2024; Cruz Portorreal et al., 2024), for example, about environmental issues such as erosion or conservation of marine biodiversity. Muurmans et al. (2016) highlight that environmental education promotes the active participation of local community in activities such as revegetating dune ecosystems and encourages the adoption of sustainable practices. The implementation of feedback mechanisms is also crucial for enhancing research processes, improving environmental management, and enabling resident participation (Alfiandri et al., 2024; Chen et al., 2024; Kim et al., 2024).

Public-private partnerships are a way of involving different stakeholders and local communities in decision-making processes and in the implementation of participatory governance projects, promoting sustainable

development (Bollig, 2016; Rey et al., 2017; Gonzalez-Morales et al., 2021; Salerno et al., 2023; Fernández et al., 2024). However, these partnerships present challenges, such as diverging perspectives and priorities among stakeholders, and can lead to poorly planned investments that negatively impact residents' socioeconomic conditions (Salerno et al., 2023). Gonzalez-Morales et al. (2021) note that these partnerships are particularly relevant in cases where public administrations lack effective dialogue with local communities.

Social movements have an important role in local demands and in influencing political and legislative decisions by local communities, for example in situations of overtourism or degradation of natural resources caused by the massification of tourism (Fernández et al., 2024; González-Reverté and Guix, 2024). As Fernández et al. (2024) emphasized, these movements are essential for environment preservation and controlling unregulated tourism growth.

Investment in training and capacity building is widely advocated (Fabricius et al., 2001; Malek and Costa, 2015; Hong and Saizen, 2019; Adebayo and Butcher, 2023; Coscarello and Manella, 2024) as it promotes more active community participation in tourism and natural resources management. Hong and Saizen (2019) underline that the lack of entrepreneurial and managerial experience can compromise the success of community-based tourism, underscoring the need for targeted training programs to equip residents with essential tourism skills.

Surveys, like focus groups, allow to collect perceptions, suggestions and feedback from residents, which leads to a better understanding of their needs and priorities and to achieve a greater acceptance by local communities (Sugimoto et al., 2022). Similarly, community meetings and information sessions provide valuable platforms for engaging residents and stakeholders in decision-making and planning (Malek and Costa, 2015; Hong and Saizen, 2019; Poscente et al., 2022). These meetings also create opportunities to identify and address community-specific concerns.

Mehnen et al. (2023) describe living labs as innovative platforms fostering collaboration between local communities, experts, and authorities to drive local development, participatory innovation, and collaborative governance. Similarly, Salerno et al. (2023) highlight local action groups as key governance tools for formulating and implementing local development plans. Adebayo and Butcher (2023) present local government tourism committees (LGTCs) as vital for empowering residents in tourism through structured community participation. However, LGTC effectiveness relies on political authorities' willingness to decentralize power and grant communities greater influence in tourism decisions.

Together, these tools contribute to local community empowerment (Sloan et al., 2013; Brooks et al., 2023) and the establishment of a truly participatory governance. According to the articles analysed, the implementation of these tools also presents challenges that must be taken into consideration, such as inequality of participation among residents (Bennett and Dearden, 2014; Woodhouse et al., 2018), which leads to the non-inclusion of diverse voices from local communities, often due to lack of awareness of the availability of existing tools. The lack of transparency and good communication channels (Bennett and Dearden, 2014) on the part of local authorities also leads to limited community participation. The absence of economic resources, technical skills or human resources to implement surveys, focus groups, workshops or training programs stives as a barrier for these processes in the case of some tourist destinations. It can also occur that some local authorities are resistant to implement these tools and mechanisms of participation due the fear of losing control over local tourism planning processes.

5. Conclusion and Recommendations

The study identifies key tools and mechanisms that facilitate local community participation. By integrating these various tools, participation processes can become more efficient, dynamic, and collaborative. Focus groups and surveys can be combined to capture residents' perceptions through both qualitative and quantitative approaches. Workshops can be enriched with training programs, enabling participants to develop new skills and knowledge. Educational programs can serve as a foundation for fostering social movements, empowering communities to take collective action. Regular resident and stakeholder meetings can be complemented with feedback mechanisms, ensuring continuous input to refine decision-making processes and local strategies. Additionally, Living Labs, which promote participatory innovation, can benefit from public-private partnerships, securing the resources and support needed to transform ideas into tangible actions. Together, these tools create a process that improves participatory governance, thus empowering local communities. Although the literature analysed was not extensive, the results offer a relevant insight into the practices and approaches that can be adopted to enable the participation of local communities and various stakeholders by DMOs.

This study advances knowledge in participatory governance, a crucial mechanism for improving tourism destination management. Participatory governance not only benefits communities by addressing their needs but also generates insights to attract new tourists and extend their stays. Several authors (Malek and Costa, 2015; Ramukumba, 2021; Li et al., 2023; Mehnen et al., 2023) highlight its positive impact on conservation, sociocultural and economic development, and sustainable destination management. However, persistent barriers hinder its progress. As (Fabricius et al., 2001; Presenza et al., 2013; Alfiandri et al., 2024; Reina-Usuga et al., 2024) point out, the lack of structured decision-making processes and limited communication channels often result in superficial or rhetorical cooperation and weak resident integration, underscoring the need for effective mediation to resolve conflicts and enhance governance efficiency.

Future research can deepen this study and verify how these tools can be implemented more efficiently (Malek and Costa, 2015; Mehnen et al., 2023; Priambodo et al., 2023) as well as the degree of effectiveness of each one according to different cultural, tourist or geographic contexts (Sugimoto et al., 2022; Ma et al., 2023; Alfiandri et al., 2024; González-Reverté and Guix, 2024; Reina-Usuga et al., 2024). It is also important to analyse how the application of these tools and participation mechanisms contribute, in the long term, to the sustainability of destinations, to resilience and the improvement of the quality of life of local communities and to the strengthening of local economies (Adebayo and Butcher, 2023; Brooks et al., 2023; Li et al., 2023).

The use of digital technologies, such as platforms or mobile applications, has gained relevance as tools that allow the participation of local communities. Further research should examine the specific roles these technologies play in participatory governance (Presenza et al., 2013), including their accessibility, inclusivity, and long-term impact on stakeholder collaboration and destination management.

Finally, it is recommended to develop a comprehensive and adaptable model of participatory governance that integrates the various tools and mechanisms identified in this study. Such a framework would offer a practical blueprint for DMOs and policymakers to tailor participation strategies to local realities. Due to the limited scope of the present literature review, creating such a model was beyond the study's capacity, underscoring the need for continued exploration in this critical area.

References

- Adebayo, A. D., and Butcher, J. (2023). Community empowerment in Nigeria's tourism industry: An analysis of stakeholders' perceptions. *Tourism Planning & Development*, 20(4), 583-603.
- Alfiandri, A., Prasojo, E., Salomo, R. V., and Wicaksono, A. (2024). Beyond Volatility: Harnessing VUCA Methodology for Sustainable Collaboration in Bintan Island's Mangrove Ecotourism Governance. *Danube*, 15(2), 166-187.
- Bennett, N. J., and Dearden, P. (2014). Why local people do not support conservation: Community perceptions of marine protected area livelihood impacts, governance and management in Thailand. *Marine policy*, 44, 107-116.
- Bollig, M. (2016). Towards an Arid Eden? Boundary-making, governance and benefit-sharing and the political ecology of the new commons of Kunene Region, Northern Namibia. *International Journal of the Commons*, 10(2), 771-799.
- Brooks, C., Waterton, E., Saul, H., and Renzaho, A. (2023). Exploring the relationships between heritage tourism, sustainable community development and host communities' health and wellbeing: A systematic review. *PLoS One*, 18(3), e0282319.
- Carvalho Ribeiro, S., Ferreira, E., Paula, L. G.; Rodrigues, R., Drumond, M. A., Purcino, H., Oliveira, B., Moreira, V., Monteiro, A., Fonseca, B., Almeida, N., and O'Riordan, T. (2024). What can be learned from using participatory landscape scenarios in Rio Doce State Park, Brazil?. *Landscape Ecology*, 39(3), 65.
- Chen, N., and Dwyer, L. (2018). Residents' Place Satisfaction and Place Attachment on Destination Brand-Building Behaviors: Conceptual and Empirical Differentiation. *Journal of Travel Research*, 57(8), 1026-1041.
- Chen, V. Y., Lu, D. J., and Han, Y. S. (2024). Hybrid Intelligence for Marine Biodiversity: Integrating Citizen Science with AI for Enhanced Intertidal Conservation Efforts at Cape Santiago, Taiwan. *Sustainability*, 16(1), 454.
- Coscarello, M., and Manella, G. (2024). Tourist Walking Trails in Italy and Argentina: Navigating Political Recognition and Socio-Territorial Innovation. *Land*, 13(9), 1405.
- Cruz Portorreal, Y., Beenaerts, N., Koedam, N., Reyes Dominguez, O. J., Milanes, C. B., Dahdouh-Guebas, F., and Pérez Montero, O. (2024). Perception of mangrove social-ecological system governance in southeastern Cuba. *Water*, 16(17), 2495.
- Daconto, G., and Sherpa, L. N. (2010). Applying scenario planning to park and tourism management in Sagarmatha National Park, Khumbu, Nepal. *Mountain Research and Development*, 30(2), 103-112.
- Escobedo, S. I. O., Jiménez, G. C., and Nechar, M. C. (2021). La gobernanza en los estudios sobre turismo: estado del arte (2013-2019). *Gran Tour, Revista de Investigaciones Turísticas*, (23), 50-75.
- Fabricius, C., Koch, E., and Magome, H. (2001). Towards strengthening collaborative ecosystem management: lessons from environmental conflict and political change in southern Africa. *Journal of the Royal Society of New Zealand*, 31(4), 831-844.

- Fernández, H., Picazo, P., and Moreno Gil, S. (2024). The Pathway to Sustainability in a Mass Tourism Destination: The Case of Lanzarote. *Sustainability*, 16(12), 5253.
- Gonzalez-Morales, O., Santana Talavera, A., and Domínguez González, D. (2021). The involvement of marine tourism companies in CSR: the case of the island of Tenerife. *Environment, Development and Sustainability*, 23(8), 11427-11450.
- González-Reverté, F., and Guix, A. S. (2024). The social construction of anti-tourism protest in tourist cities: a case study of Barcelona. *International Journal of Tourism Cities*.
- Gössling, S., McCabe, S., and Chen, N. (Chris). (2020). A socio-psychological conceptualisation of overtourism. *Annals of Tourism Research*, 84.
- Hong, N. T., and Saizen, I. (2019). Forest ecosystem services and local communities: Towards a possible solution to reduce forest dependence in Bach Ma National Park, Vietnam. *Human Ecology*, 47, 465-476.
- Horgan, D., and Koens, K. (2024). Don't Write Cheques You Cannot Cash: Challenges and Struggles with Participatory Governance. In *From Overtourism to Sustainability Governance* (pp. 227-240). Routledge.
- Kim, A., Scott, C. P., and Swartz, W. (2024). Local perspectives on marine ecotourism development in a water-insecure island region: the case of Bocas del Toro, Panama. *Frontiers in Marine Science*, 11, 1377053.
- Li, J., Stoffelen, A., Meijles, E., and Vanclay, F. (2023). Local people's sense of place in heavily touristified protected areas: Contested place meanings around the Wulingyuan World Heritage Site, China. *Landscape and Urban Planning*, 237, 104792.
- Ma, T., Jia, L., Zhong, L., Gong, X., and Wei, Y. (2023). Governance of China's Potatso National Park influenced by local community participation. *International Journal of Environmental Research and Public Health*, 20(1), 807.
- Malek, A., and Costa, C. (2015). Integrating communities into tourism planning through social innovation. *Tourism Planning & Development*, 12(3), 281-299.
- Mehnen, N., Mose, I., Schaal, P., Sijtsma, F., Muñoz-Rojas, J., Fedoriak, M., and Angelstam, P. (2023). Periphery and Integrated Planning: Coping with Rural and Touristic Challenges across Scales in the German Wadden Sea Region. *Land*, 12(4), 904.
- Moher, D., Shamseer, L., Clarke, M., Ghersi, D., Liberati, A., Petticrew, M., Shekelle, P. and Stewart, L.A. and the PRISMA-P Group. (2015) "Preferred reporting items for systematic review and meta-analysis protocols (PRISMA-P) 2015: elaboration and explanation", *BMJ*, Vol. 349, Jan02 1, p. 7647.
- Muurmans, M., Leahy, P., and Richards, L. (2016). Communicating beach management: educators; coastal engineers and local governments collaborating to create successful education programs. *Journal of Coastal Research*, (75), 672-674.
- Paredes-Rodríguez, A. A., and Spierings, B. (2020). Dynamics of protest and participation in the governance of tourism in Barcelona: a strategic action field perspective. *Journal of Sustainable Tourism*, 2118-2135.
- Poscente, M., Chojinzav, T., and Chultemgombo, B. (2022). Mine closure plan for the Salkhit silver mine in Mongolia. In *Mine Closure 2022: Proceedings of the 15th International Conference on Mine Closure* (pp. 209-224). Australian Centre for Geomechanics.
- Presenza, A., Del Chiappa, G., and Sheehan, L. (2013). Residents' engagement and local tourism governance in maturing beach destinations. Evidence from an Italian case study. *Journal of destination marketing & management*, 2(1), 22-30.
- Priambodo, M. P., Abbas, M. H. I., and Prastiwi, L. F. (2023). Optimizing the Socio-Economic Welfare Aspect of Communities in Rural Tourism Areas by Developing the Potencies of Indigenous Creative Economy. In *E3S Web of Conferences* (Vol. 444, p. 03013). EDP Sciences.
- Ramukumba, T. (2021). A critical review of environmental governance, land restitution, and tourism in protected areas. *African Journal of Hospitality, Tourism and Leisure*, 10(6), 1916-31.
- Reina-Usuga, L., Camino, F., Gomez-Casero, G. and Alba, C. (2024). Rural tourism initiatives and their relationship to collaborative governance and perceived value: A review of recent research and trends. *Journal of Destination Marketing & Management* (34) 100926.
- Rey, A. N. R., Pizarro, J. C., Anderson, C. B., and Huettmann, F. (2017). Even at the uttermost ends of the earth: How seabirds telecouple the beagle channel with regional and global processes that affect environmental conservation and social-ecological sustainability. *Ecology and Society*, 22(4).
- Salerno, G., Palladino, M., Cafiero, C., Romeo, G., and Marciàno, C. (2023). Gastronomy and Tourism in Remote European Areas: Toward a Food and Wine Atlas of the Metropolitan City of Reggio Calabria. In *International Symposium: New Metropolitan Perspectives* (pp. 405-421). Cham: Springer International Publishing.
- Sloan, P., Legrand, W., and Simons-Kaufmann, C. (2013). Social entrepreneurship and cultural tourism in developing economies. In *The Routledge Handbook of Cultural Tourism* (pp. 236-241). Routledge.
- Sugimoto, A., Sugino, H., and Hori, J. (2022). How bountiful is the ocean? Participatory valuation of human-nature relationships in Yaeyama Islands, Okinawa, Japan. *Sustainability Science*, 1-20.
- Thees, H., Pechlaner, H., Olbrich, N., and Schuhbert, A. (2020). The living lab as a tool to promote residents' participation in destination governance. *Sustainability*, 12(3), 1120.
- Torres-Salcido, G., and Sanz-Cañada, J. (2018). Territorial governance. A comparative research of local agro-food systems in Mexico. *Agriculture*, 8 (2), 18.
- Voorberg, W., Bekkers, V. J. J. M., and Tummers, L. (2014). A systematic review of co-creation and co-production: Embarking on the social innovation journey. *Social Science Research Network*.

- Woodhouse, E., Bedelian, C., Dawson, N., and Barnes, P. (2018). Social impacts of protected areas: Exploring evidence of trade-offs and synergies. In *Ecosystem Services and Poverty Alleviation (OPEN ACCESS)* (pp. 222-240). Routledge.
- Zenker, S., Braun, E., and Petersen, S. (2017). Branding the destination versus the place: The effects of brand complexity and identification for residents and visitors. *Tourism Management*, 58, 15–27.

South African Domestic Tourists and Local Foods: Measuring the Four Dimensions of the Experience Economy

Hennie Fisher¹, Gerrie du Rand¹, Richard Hay² and Zelmari Coetzee¹

¹Department of Consumer and Food Sciences, University of Pretoria, South Africa

²Future Africa Institute, University of Pretoria, South Africa

hennie.fisher@up.ac.za

gerrie.durand@up.ac.za

richard.hay@up.ac.za

z6coetzee@gmail.com

Abstract: Despite South Africa adopting a new democratic dispensation 31 years ago, the country remains burdened by inequality, unemployment and other social and economic struggles. The South African White Paper on the Development and Promotion of Tourism in South Africa calls for leveraging tourism to drive environmental preservation, cultural enrichment, and economic progress. Therefore, it is of the utmost importance to develop local food tourism. The aim of this research was to establish the effect of local food and food-related experiences on local tourists' experiences. Even though the four classic Experience Economy dimensions proposed by Pine and Gilmore, namely Entertainment, Education, Escapism and Aesthetics, were applied, the researchers took note of the newly added Entrepreneurial dimension by Chirakranont and Sunanta. Data was collected during December 2024; of the 276 valid responses, 97.5% indicated that they always/sometimes search for local foods when travelling locally. The Sweet-spot effect was not identified for any of the respondents, nor did any of the four dimensions achieve a score close to five on the 5-point Likert scale for Agreement. There appears to be a missed opportunity, as the lower-than-ideal experience dimension results of the EE model indicated that local food entrepreneurs are still not capitalising on their niche local foods and offerings.

Keywords: Heritage food, Indigenous ingredients, Domestic tourists, Food tourism, Experience economy

1. Introduction and Background

Global domestic and local tourism is estimated to be worth around USD 1,670.32 billion (Grand-View-Research 2022). In 2023, South Africa recorded 38 million domestic trips with an estimated value of R121 billion (South-African-Tourism 2024). This figure represents the Experience Economy, where value is created through the consumption of resources (Oh et al. 2007). Food plays a significant role in both leisure and business tourism (Sengel et al. 2015), with tourists reportedly spending up to one-third of their vacation expenditure on food and beverages (Kim et al. 2009). Tourists are willing to pay more for unique and unforgettable experiences (Şeker and Unur 2022), including food (Lang et al. 2014), benefiting rural and non-urban communities by tapping into these economic possibilities. However, the contribution of local foods to local tourism has not been quantified in the South African context.

The purpose of this research is to understand the value of local food and food-related tourism experiences for local tourists in terms of the four Experience Economy dimensions. The study provides an overview of local South African tourists, the concept of local food, and the Experience Economy model (EE model) while illustrating how local food tourism aligns with Experience Economy dimensions. By understanding these findings, local food entrepreneurs and tourism suppliers can better develop, amend and communicate their local food offerings to experience-seeking tourists. This research is justified by the economic benefits of local tourist engagement with local foods, such as employment, retention of local expenditure, increased brand awareness of a South African Culinary Identity, and celebration of heritage foods and culture. Furthermore, the emphasis on local and regional food has the potential to strengthen links between local food producers and consumers, which could counterbalance the dominance of the global food sector (Sidali et al. 2015).

2. Literature Review

2.1 Local Food

A clear, unambiguous definition of the concept of local food does not exist, and meanings vary widely (Granvik et al. 2017). It is an ever-evolving concept, often differently interpreted by activists, governmental entities, and researchers (Brune et al. 2023). These authors define local food as "foods that are produced, commercialised and consumed in a particular locality, either at a regional or provincial level, but not as broadly as originating from country level". Although local food appears to have geographical associations, there is no agreement about the distance between production and consumption (Martinez 2010). Feldmann and Hamm (2015) found that apart from a location dimension, for consumers, the concept of 'local food' may entail aspects like political

boundaries and special criteria (such as brand names) and could even encompass emotional and/or ethical dimensions.

Regional food differs from local food in that, while production and processing should be local, sales can take place in a different location (Granvik et al. 2017). On the other hand, traditional food emphasises the linkage between the territory of origin – i.e., the provenance of the raw materials – and the area where processing occurs, specifically applying a processing technique developed locally through tradition over time (Galli 2018). International examples of such quality schemes for traditional foods include Geographical Indications (GIs), Protected Designations of Origin (PDO) or Protected Geographical Indications (PGIs) (Galli 2018). South Africa offers a multitude of local foods, resulting from its multicultural society, where each culture or ethnicity has its own heritage or ethnic food and food practices (Reddy and van Dam 2020).

Researchers Almansouri et al. (2021) identified three dimensions from literature that dominate within a specific food classification, namely legacy, people and place:

- **traditional food** - legacy and place dimensions dominate;
- **ethnic food** - people and legacy dimensions dominate;
- **local food** – place dimension dominates;
- **heritage food** – legacy, place, and people dimensions dominate.

As consumers may not be conversant with the specificities of the term ‘local food’ (Feldmann and Hamm 2015), “a business declaration on a common definition of local food is not needed as long as the individual actors are transparent with their definition” (Granvik et al. 2017). Consequently, this research adopted Ghanem's (2019) definition of local food, which considers food to be local regardless of its categorisation as regional, traditional, cultural or heritage foods of the specific country.

2.2 Local Tourism

Local tourism involves the development and promotion of tourism activities focusing on cultural, historical and natural attractions, including various forms such as culinary, rural and domestic tourism. Local tourism attained importance during and after the COVID-19 pandemic to counteract the decline in international tourism (Mzobe et al. 2022). Emerging economies prioritise local tourism development, often based on ‘place-based’ development strategies (Mgabhi et al. 2024, Rogerson and Rogerson 2019). Local tourism development is crucial for local economic development, with the responsibility for implementing economic growth and developmental strategies often falling to small-town municipalities (Rogerson and Rogerson 2019). Local tourism development provides significant opportunities for community empowerment and economic growth (Ramukumba 2019). These tourism activities contribute to strengthening and enhancing cultural preservation and community identity. South-African-Tourism (2023) reports that South Africa’s tourism sector generated \$9 billion in revenue in 2022, supporting about 1.5 million job opportunities and contributing to local economic activities (Bain 2024). Local tourism, therefore, plays a vital role in enhancing local economic development and supporting employment opportunities.

Culinary tourism can be leveraged by small towns to achieve economic growth, preserve culinary heritage, and contribute to local identity. This can be done by offering local tourists opportunities to experience local cuisine and various food-related activities, events and experiences. Such initiatives generate revenue for local businesses (Bain 2024) and support the foodservice industry in both cities and small towns where local food is available, providing a unique ‘place-based’ food experience. Culinary tourism contributes to job creation, increases the demand for local ingredients, creates sustainable income for local economies, and enhances community identity and cultural pride (Bain 2024).

Although local food experiences are an integral component of local tourism, challenges in terms of affordability and marketing remain pressing. Therefore, the Experience Economy analysis (Özdemir and Polat 2021) offers an ideal framework for local food tourism offerings and could assist destinations to design better food experiences and stimulate interest in local travel.

2.3 Experience Economy

Tourists seeking memorable experiences often purchase items including local foods, which they combine with their own time and skills to create a “consumption set for the experience” (Andersson 2007). The local food industry provides input that tourists can transform into experiences, but for this to be successful it should address and fit the tourists’ needs at a specific time.

The EE model, initially proposed by Pine and Gilmore (1999) as “an emerging paradigm for enhancing business performance across a wide range of industries, including tourism and hospitality” (Oh et al. 2007), is applied to understand experiential product offerings. It includes four types of experiences – education, entertainment, escapism, and aesthetics – each contributing uniquely to create an optimal tourist experience (Leung et al. 2023), also referred to as the ‘sweet spot’.

For this research, the four dimensions of the EE model were used to explore the subjective mental states perceived by local South African tourists and their interaction with local foods. These were:

- **Education experience:** This dimension involves seeking experiences facilitating knowledge and learning. Tourists interactively learn through mind and body engagement, which increases positive responses (Leung et al. 2023). Skills and knowledge are improved through active participation and absorption, such as attending a hands-on cooking class focused on local foods (Oh et al. 2007).
- **Entertainment experience:** Through passive absorption, tourists can enjoy activities and interact in an environment that improves positive feelings and reduces stress (Leung et al. 2023). For example, local tourists may passively observe a local food cooking demonstration or indigenous food discussion (Oh et al. 2007).
- **Escapism experience:** This dimension refers to the level at which tourists immerse themselves in an environment, putting aside unpleasant thoughts and detaching from their daily routine through novel experiences (Leung et al. 2023). This could include visiting a specific local food destination such as exploring mampoer in the Groot Marico (Hyslop 2012), and orchestrating an escapist experience by taking the role of ‘mixologist’ to create mampoer-based cocktails (Oh et al. 2007).
- **Aesthetic experience:** The aesthetic experience implies the overall atmospheric or environmental setting, such as the physical surroundings, décor, product displays and other elements that evoke a positive mood in the tourist (Leung et al. 2023). Local tourists may enjoy being in the destination environment, such as visiting one of the iconic South African West Coast beach restaurants offering seafood barbeques (Oh et al. 2007).

In Figure 1 below, the x-axis shows different levels of participation from passive participation (characterised by the entertainment and aesthetic dimension), while the education and escapism dimension align with active participation. In other words, local tourists passively participating in local food by watching a local cooking show will not directly affect the performance of local businesses. Conversely, active local tourists will directly impact the performance of local food establishments through their experiences. On the y-axis, the absorption/immersion axis, local tourists typically ‘absorb’ entertainment and educational offerings of a local food destination and ‘immerse’ themselves in the local food environment, resulting in aesthetic or escapism experiences. Absorption in this context means that the local food experience occupies the mind of the local tourist, while immersion implies that the local tourist physically partakes in the local food (Oh et al. 2007).

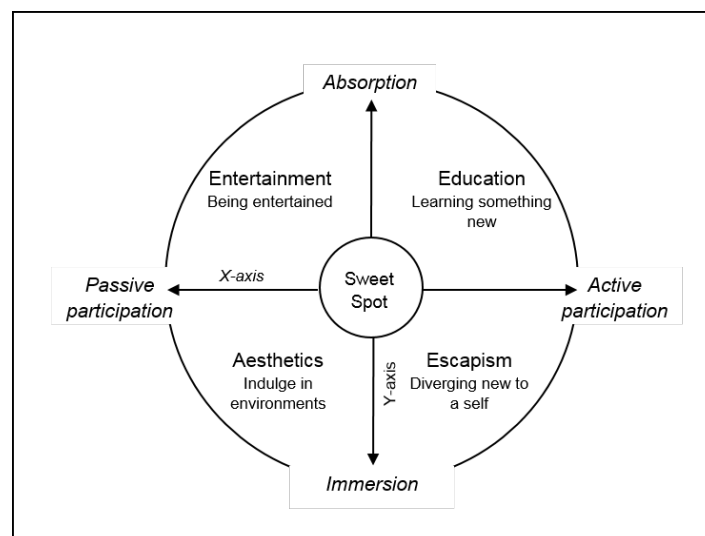


Figure 1: The Experience Economy Dimensions (adapted from Oh et al. 2007)

Similarly, Chirakranont and Sunanta (2021) applied the EE model to Craft Beer festivals in Thailand and found that all four dimensions were successfully met during the festival via music, artists, competitions, brewing

classes, beer tasting, beer ambassadors, and other festival goers. The organiser created sufficient opportunities for festival-goers to engage holistically with the experience. However, they identified and proposed a fifth dimension to the model, Entrepreneur Experience. They found that engagement with the business owner significantly and positively impacted the total experience. In another study conducted in Thisted, a rural region in the north-western part of Denmark (Arthur 2008), the EE model was applied to understand how the rural food industry could achieve competitive advantages in an experience economy. Other food-related research applying the EE model includes measuring the culinary experience of tourists through the case of Hue cuisine in Vietnam (Hoang 2023) and examining the nature of experiential consumption underlying restaurants and Peer-to-Peer (P2P) dining services (Mhlanga 2024).

3. Methodology

The EE model developed and refined by Oh et al. (2007), Quadri-Felitti and Fiore (2012), Pine and Gilmore (2011), and Coetzee (2015) was adapted to determine and explain local tourists' experiences of local food and to quantify the value local tourists attribute to the four traditional Experience Economy dimensions. This scale was applied using an electronic questionnaire on local food experiences, made available to local South African tourists through Qualtrics. The survey was piloted (n=10) in November 2024 to detect errors before being shared with a larger group of South African local tourists. The electronic survey included demographic criteria to ensure participation by South African residents living and travelling locally. Section two recorded personal travelling tendencies, while section three asked respondents to rate the dimensions of the Experience Economy based on a recent food experience while travelling. This section was guided by dissonance theory (Festinger 1962) to establish the value of local food experienced by local travellers. The Experience Economy was selected as a suitable methodology as it enables the identification of the role and value of culinary activities as memorable and engaging experiences that enhance tourist satisfaction and destination competitiveness. It provides additional value to the data collected as the value of the culinary tourism experience is emphasised. Furthermore, this methodology allows for the integration of educational, escapist, aesthetic, and entertainment dimensions of the culinary tourism experience, promoting a deeper connection with the destination. As a methodology proposed by Pine and Gilmore, the EE model enhances the appeal of culinary tourism whilst simultaneously meeting the growing consumer demand for authentic and immersive experiences.

This study aims to address the main research question: "What is the effect of local food and food-related experiences on the tourist experience using the EE model?". More specifically, to measure the effects of consuming food and food-related experiences in terms of Entertainment, Education, Escapism and Aesthetics.

Statistical Package for the Social Sciences and Analysis of Moment Structures software were used to analyse the data. The adapted scale was validated using Confirmatory Factor Analysis (CFA), and descriptive analyses and ANOVA were used to guide comparisons between different demographic groups. Data was collected during December 2024 for 16 days resulting in 276 valid and complete responses after data cleaning and screening.

4. Results

The sample comprised 75 males and 199 females, comprising 1 person from the Silent Gen, 56 Boomers, 94 Gen X'ers, 90 Millennials and 35 Gen Z. Regarding education level, 60.9% indicated an undergraduate qualification and 39.1% had postgraduate qualifications. In addition, 87.7% of the sample travelled locally for recreational purposes in the last three years, 11.2% travelled less than once per year locally, 18.8% travelled once annually, 25.7% twice per year, 19.6% three times per year and 24.9% four or more times per year. 6.5% of respondents travelled locally for business only, 56.9% for pleasure only, and 36.6% for both business and pleasure. 51.8% indicated that they always seek out local foods on their local travels, 45.7% indicated that they sometimes seek out local foods, and 2.5% never seek out local foods.

In order to understand their local travelling and local food preferences and tendencies, respondents had to choose responses from a 5-point Likert Scale (5 = Strongly Agree) for 27 unique statements. A strong preference (mean > 4) towards food experiences during their travels was noted, and many respondents indicated that they read up on places to eat before travelling (m = 4.17). However, fewer respondents agreed that they plan their dining experiences prior to departure (m = 3.45). Most respondents considered *food* a special interest as they '*consider myself a foodie*' (m = 3.87) and '*follow foodies*' on social media (m = 3.62), yet few were concerned with the accessibility and availability of local foods. The study was based on remembering tourism events, and while most respondents strongly agreed that they do recall the foods they ate (m = 4.29), it should be noted that within memory research, individuals' ability to vividly recall trip details, sensory details and emotional details

(Kim et al. 2022) is acknowledged. However, in tourism research, memory is often positively biased, as explained by the “rosy view phenomenon” by Cho (2022) and Mitchell et al. (1997).

A Confirmatory Factor Analysis (Figure 2, Table 1) was performed on the EE model. The initial model included 4 latent constructs, each measured by 6 observed indicators. Item 18.5 showed a low loading and low reliability and was removed for further analyses - the wording of item 18.5 was found to be confusing since the word ‘pretty’ can be interpreted as ‘beautiful’ or ‘a lot’ (many) in South African English, making the phrase ‘pretty bland’ an oxymoron. Fit indices indicated acceptable fit: $\chi^2(df) = 709.076 (224)$, $p = 0.000$, $\chi^2/df = 3.166$, CFI = 0.909, TLI = 0.888, RMSEA = 0.089. Construct validity was proven by higher than 0.63 loading on 12 indicators and higher than 0.80 on the other 12 indicators. Reliability analysis shows high internal reliability with Cronbach’s Alpha (Table 2) for all four factors above 0.860. Therefore, the adapted EE scale is validated in the current setting.

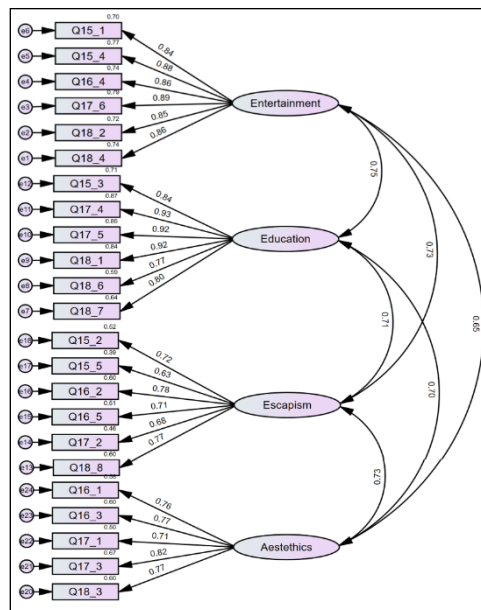


Figure 2: CFA on the EE model

Table 1: Descriptive Values of the Experience Economy Dimensions

		Entertainment	Education	Escapism	Aesthetics
N	Valid	275	275	275	276
	Missing	1	1	1	0
Mean		3.8042	3.7636	3.5279	4.1239
Median		4.0	3.83	3.50	4.20
Mode		5.00	5.00	3.00	5.00
Std. Deviation		0.90650	0.93519	0.86569	0.78375
Std. Error of mean		0.05466	0.05639	0.05220	0.04718
Variance		0.822	0.875	0.749	0.614

Respondents were requested to recall a specific food experience and assess their experience using the EE model. These experiences included cooking with friends or celebrities; visiting craft distilleries, wine, cheese and honey farms; foraging for marula fruits and mopani worms; catching fish, crayfish and mussels with local fishermen, and a cooking course hosted by an indigenous Khoi lady. Theoretically, the experiences were a good representation of the four dimensions. However, Aesthetics was the most prominent dimension within local food experiences ($m = 4.12$). This is expected, as many business owners endeavour to create dining environments which enhance the food and create an ambience as a backdrop to the food experience. This confirms the aesthetics dimension that emerged from similar studies by Haller et al. (2021), Coetzee (2015) and Quadri-Felitti and Fiore (2012). The Entertainment dimension ($m = 3.80$) (Table 1) was lower than expected for the tourism industry, whose main purpose is to host and entertain customers and shows potential for improved

food experiences. The Education dimension ($m = 3.76$) also scored low for food experiences that would inherently be educational since travelling and experiencing local food items could easily be a learning experience. Coetzee (2015) reported a similar result ($m = 3.78$). Escapism ($m = 3.53$) can be described as the sense of losing your persona in the experience. Food experiences are often immersive and need active participation involving seeing, smelling, touching and tasting food items. Engaging all the senses during a food experience could easily lead to escapist moments, especially since many of the foods referred to by respondents are heritage foods that could well evoke memories and nostalgia. However, the mean indicates that not many food experiences stimulated a feeling of escapism within participants. Overall, this indicates that these dimensions are not well catered for in local food experiences.

Table 2: Factor loadings

Item nr		N	Mean	Σ	Variance	Cronbach Alpha	CFA factor loadings
Entertainment							
16.4	I really enjoyed watching what others were doing	276	3.964	0.960	0.922	α = 0.946	.86
15.4	Watching activities of others was very entertaining	275	3.847	1.028	1.057		.88
15.1	Activities of others were fun to watch	276	3.844	0.962	0.925		.84
17.6	What others did was interesting to watch	276	3.801	1.048	1.098		.89
18.4	Watching others perform was captivating	276	3.688	1.057	1.117		.86
18.2	Activities of others were amusing to watch	276	3.685	1.064	1.133		.85
Education							
18.7	The experience stimulated my curiosity to learn new things	276	3.899	1.008	1.015	α = 0.946	.80
17.5	The experience has made me more knowledgeable	276	3.895	1.013	1.025		.92
17.4	I learned a lot	276	3.855	1.038	1.077		.93
15.3	The experience was highly educational to me	275	3.811	1.081	1.168		.84
18.1	It was a real learning experience	276	3.775	1.086	1.178		.92
18.6	The experience really enhanced my skills	276	3.333	1.094	1.198		.77
Escapism							
16.5	I totally forgot about my daily routine	276	3.986	1.068	1.142	α = 0.860	.71
15.2	I felt I was in a different world	276	3.728	1.073	1.151		.72
16.2	I felt like I was living in a different time or place	276	3.663	1.111	1.235		.78
18.8	I completely escaped from reality	276	3.493	1.117	1.247		.77
17.2	The experience here let me imagine being someone else	276	3.308	1.198	1.436		.68
15.5	I felt I played a different character here	275	3.011	1.198	1.434		.63
Aesthetics							
18.3	Just being there was very pleasant	276	4.395	0.831	0.691	α = 0.872	.77
16.1	The setting provided pleasure to my senses	276	4.301	0.934	0.873		.76
17.3	The setting was very attractive	276	4.116	0.973	0.947		.82
16.3	I really felt a sense of harmony	276	3.949	0.997	0.994		.77
17.1	The setting really showed attention to design detail	276	3.859	1.068	1.140		.71

ANOVAs were conducted to compare the effects of demographic characteristics on the Experience Economy dimensions. There is a significant difference between how different generational groups experienced the Aesthetics and Escapism dimensions. Generation Z experienced Escapism and Aesthetics more prominently than older generations. *“Reading up”* before the departure was a significant indicator of how the four dimensions were experienced, improving the prominence of the dimensions, particularly Entertainment, with between 0.66 and 1.2 Likert scale points. Those who considered themselves to be a *“foodie”* indicated at least a 1-point increase on the 5-point Likert scale in the experiences for Entertainment ($m = 4.08$), with a mean difference of 1.325, Education ($m = 4.094$) with a mean difference of 1.493, and Aesthetics ($m = 4.402$) with a mean difference of 1.002, ($p < 0.005$) while those who were *“willing to try new foods”*, scored Entertainment 1.654 points ($p = 0.002$) higher than those who strongly disagreed with the statement. *“Being curious about other cultures’ food”*, *“wanting to choose local food when traveling”*, *“being intentional about trying new foods”*, *“reading food related articles”*, and *“wanting to eat where the locals eat”* all showed significant ANOVA’s with Entertainment and Education showing an increase of at least 1.00 ($p < 0.005$) Likert scale point over those who strongly disagreed with these statements.

5. Discussion

The value of local tourists gaining satisfaction from their engagement with local food cannot be underestimated. Stimulating new business and ensuring returning business depends on tourists engaging in unforgettable experiences. Stakeholders wishing to gain a competitive edge must offer the best experiences to local tourists. Arthur (2008) proposed using the EE model to this end. It is, therefore, essential that stakeholders gain a thorough understanding of the connection between local food offerings and local tourist satisfaction and how the dimensions of the EE can affect their success. The aim of this research was to examine the dimensions affecting the ‘sweet-spot’ concept (Figure 1), or more accurately, the association between local tourists’ experiences around local food and their engagement in four specific dimensions of the Experience Economy (Saiful Nizam et al. 2024). The effects of consuming food and food-related experiences in terms of Entertainment, Education, Escapism and Aesthetics were measured using the EE model. Results indicated that there is a missed opportunity for business owners in food services. The lower-than-ideal experience dimensions indicate that local food experience providers do not fully realise or capitalise on their niche local foods or offerings. The Sweet-spot effect was not achieved for any of the respondents, and neither did any of the four dimensions achieve a score close to five on the 5-point Likert scale for Agreement, indicating that all dimensions were lacking during the local food experience. In measuring the contribution of each dimension to the total experience, the Aesthetics dimension scored the highest, although it too can be improved. The strong preference towards food experiences during local travels may imply that local tourists consume, enjoy, buy and remember local foods during their local travels regardless of the purpose of travel. This signals that the EE dimensions are equally important for all types of local tourists. Being intentional and curious about local foods resulted in local tourists reporting improved experiences and the intention to return. Therefore, local food businesses and entrepreneurs should re-evaluate their local food offerings and intentionally add, design and market experiences that are more Educational, Entertaining and Escaping from daily life.

6. Conclusion and Further Research

Anyone in the food chain dealing with local food in South Africa should take note that a massive 97.5% of the sample indicated that they always/sometimes search for local foods when travelling locally. In a country like South Africa, burdened by inequality, unemployment and many other social and economic struggles, it is important to develop local food tourism. This corresponds with recommendations in the White Paper on the Development and Promotion of Tourism in South Africa, which calls for “leveraging tourism to drive environmental preservation, cultural enrichment, and economic progress” (Desai and Bezuidenhout 2024). Care should be taken to balance the challenges and opportunities associated with aspects like quality, culture and price to create a unique local tourist experience. Local tourists want social interactions and quality time when participating in local tourist experiences (Christou and Pericleous 2023). Communities stewarding local foods should be encouraged and supported to create tourism experiences around their local foods, and this research provides valuable information to drive meaningful change in these contexts. The dimensions of the Experience Economy model, with the added Entrepreneur element from Chirakranont and Sunanta (2021), are useful to guide the creation and development of local food offerings. Furthermore, this research offers stakeholders in the local tourism and local food chains, such as destination marketers, policymakers, local food entrepreneurs, local food suppliers and many others, valuable insights into the nature, scope and value of South African local food experiences for local tourists.

Finally, Oh et al. (2007) indicated that the model “awaits further validations across different consumption situations and staged experiences”. This research offers an academic contribution to the validated application of the measuring model regarding local foods.

Future research may include a larger, more demographically representative South African population sample, as well as qualitative research to establish finer nuances regarding the four Experience Economy dimensions that are important to local tourists in relation to local foods.

Ethics: Ethical clearance was obtained from the Ethics Committee of the Faculty of Natural and Agricultural Sciences, University of Pretoria, number NAS134/2019.

Limitations: No limitations.

References

- Almansouri, M., Verkerk, R., Fogliano, V. and Luning, P. A. (2021) 'Exploration of heritage food concept', *Trends in food science & technology*, 111, 790-797.
- Andersson, T. D. (2007) 'The tourist in the experience economy', *Scandinavian Journal of Hospitality and Tourism*, 7(1), 46-58.
- Arthur, I. K. (2008) 'Conceptualisation of Experience Economy as Competitive Advantage for Rural Food Industry and Rural Development' in *EUNIP 2008*, Orkestra.
- Bain, A. (2024) 'Effect of Culinary Tourism on Local Economic Development in South Africa', *Journal of Hospitality and Tourism*, 4(2), 34-44.
- Brune, S., Knollenberg, W., Barbieri, C. and Stevenson, K. (2023) 'Towards a unified definition of local food', *Journal of Rural Studies*, 103, 103135.
- Chirakranont, R. and Sunanta, S. (2021) 'Applications of experience economy in craft beer tourism: a case study in Thailand's context', *Sustainability*, 13(18), 10448.
- Cho, K. W. (2022) 'A Review of memorable experiences and their implications for tourism experiences in management and marketing science', *Association Mondes du Tourisme*, 1, 1-33.
- Christou, P. A. and Pericleous, K. (2023) 'Domestic Tourism and the Domestic Tourist Experience: Complexities, Idiosyncrasies, and Understandings', *Tourism: An International Interdisciplinary Journal*, 71(4), 659-676.
- Coetzee, Z. (2015) *Exploring consumer experiences in guest houses in South Africa: an experience economy approach*, University of Pretoria (South Africa).
- Desai, D. and Bezuidenhout, M. (2024) 'The White Paper on the development and promotion of tourism in South Africa', [online], available: <https://www.dentons.com/en/insights/articles/2024/october/16/the-white-paper-on-the-development-and-promotion-of-tourism-in-south-africa> [Accessed December 2024 2024].
- Feldmann, C. and Hamm, U. (2015) 'Consumers' perceptions and preferences for local food: A review', *Food Quality and Preference*, 40, 152-164.
- Festinger, L. (1962) *A Theory of Cognitive Dissonance*, Stanford University Press.
- Galli, F. (2018) 'Traditional food: definitions and nuances' in *Case studies in the traditional food sector*, Elsevier, 3-24.
- Ghanem, M. S. (2019) 'The behavioral intention of tourists toward local foods: An applied research on the local foods served in Egyptian Siwa Oasis', *Journal of Service Science and Management*, 12(6), 714-741.
- Grand-View-Research (2022) *Domestic Tourism Market Size, Share & Trends Analysis Report By Tour Type (Adventure, Spiritual/Cultural, Sports, Weekend Getaways), By Tourism Type, By Mode Of Booking, By Region, And Segment Forecasts, 2023 - 2030*, GVR-4-68040-027-5, Grand View Research.
- Granvik, M., Joosse, S., Hunt, A. and Hallberg, I. (2017) 'Confusion and misunderstanding—interpretations and definitions of local food', *Sustainability*, 9(11), 1981.
- Haller, C., Hess-Misslin, I. and Mereaux, J.-P. (2021) 'Aesthetics and conviviality as key factors in a successful wine tourism experience', *International Journal of Wine Business Research*, 33(2), 176-196.
- Hoang, T. D. T. (2023) 'Examination of tourists' culinary experience: Revisiting the experience economy in the case of hue cuisine', *Journal of Tourism and Services*, 14(27), 249-264.
- Hyslop, G. (2012) 'Creaming the market: liqueurs', *South African Food Review*, 39(8), 46-48.
- Kim, Y., Ribeiro, M. A. and Li, G. (2022) 'Tourism memory, mood repair and behavioral intention', *Annals of tourism research*, 93, 103369.
- Kim, Y. G., Eves, A. and Scarles, C. (2009) 'Building a model of local food consumption on trips and holidays: A grounded theory approach', *International Journal of Hospitality Management*, 28(3), 423-431.
- Lang, M., Stanton, J. and Qu, Y. (2014) 'Consumers' evolving definition and expectations for local foods', *British Food Journal*, 116(11), 1808-1820.
- Leung, W. K., Chang, M. K., Cheung, M. L. and Shi, S. (2023) 'VR tourism experiences and tourist behavior intention in COVID-19: an experience economy and mood management perspective', *Information Technology & People*, 36(3), 1095-1125.
- Martinez, S. (2010) *Local food systems; concepts, impacts, and issues*, Diane Publishing.
- Mgabhi, N. Z., Mzimela, N. S. and Onyekwere, I. (2024) *Potentials of Rural Tourism Around Hluhluwe iMfolozi Park, South Africa: Local Community Perspective*, translated by Academic Conferences and publishing limited.

- Mhlanga, O. (2024) 'Travel dining experiencescape: a comparative evaluation of dining experiences in restaurants and P2P dining', *Journal of travel research*, 00472875241228500.
- Mitchell, T. R., Thompson, L., Peterson, E. and Cronk, R. (1997) 'Temporal adjustments in the evaluation of events: The "rosy view"', *Journal of Experimental Social Psychology*, 33(4), 421-448.
- Mzobe, S. C., Makoni, L. and Nyikana, S. (2022) 'Unlocking the potential of domestic tourism in uncertain times: Lessons from the COVID-19 pandemic in South Africa', *Studia Periegetica*, 38(2), 137-155.
- Oh, H., Fiore, A. M. and Jeoung, M. (2007) 'Measuring experience economy concepts: Tourism applications', *Journal of travel research*, 46(2), 119-132.
- Özdemir, S. S. and Polat, E. (2021) 'FOOD AND BEVERAGE EXPERIENCE IN TOURISM IN THE CONTEXT OF EXPERIENCE ECONOMY', *Journal of gastronomy, hospitality and travel (Online)*.
- Pine, B. J. and Gilmore, J. H. (1999) *The Experience Economy: Work is Theatre & Every Business a Stage*, Harvard Business School Press.
- Pine, B. J. and Gilmore, J. H. (2011) *The experience economy*, Harvard Business Press.
- Quadri-Felitti, D. and Fiore, A. M. (2012) 'Experience economy constructs as a framework for understanding wine tourism', *Journal of vacation marketing*, 18(1), 3-15.
- Ramukumba, T. (2019) 'Community views on the role of tourism in local development: A South African study', *Geo Journal of Tourism and Geosites*, 25(2), 638-647.
- Reddy, G. and van Dam, R. M. (2020) 'Food, culture, and identity in multicultural societies: Insights from Singapore', *Appetite*, 149, 104633.
- Rogerson, C. M. and Rogerson, J. M. (2019) 'Tourism, local economic development and inclusion: evidence from Overstrand Local Municipality, South Africa', *Geo Journal of Tourism and Geosites*, 25(2), 293-308.
- Saiful Nizam, N. M., Mahdzar, M., Mohd Rashid, N. K. and Mohd Nizam, N. K. (2024) 'In search of sweet pot: assessing visitors' satisfaction with Putra Mosque', *ESTEEM Journal of Social Sciences and Humanities*, 8(1), 133-143.
- Şeker, F. and Unur, K. (2022) 'The experience economy analysis of distinct destinations', *Journal of multidisciplinary academic tourism*, 7(2), 31-43.
- Sengel, T., Karagoz, A., Cetin, G., Dincer, F. I., Ertugral, S. M. and Balık, M. (2015) 'Tourists' approach to local food', *Procedia-social and behavioral sciences*, 195, 429-437.
- Sidali, K. L., Kastenholz, E. and Bianchi, R. (2015) 'Food tourism, niche markets and products in rural tourism: Combining the intimacy model and the experience economy as a rural development strategy', *Journal of sustainable tourism*, 23(8-9), 1179-1197.
- South-African-Tourism (2023) 'South African Tourism Annual Report 2023/2024', [online], available: https://live.southafrica.net/media/306819/south-african-tourism-annual-report-fy2023_24-tabled.pdf [Accessed December 2024 2024].
- South-African-Tourism (2024) 'Economic impact of the Tourism Sector: Tourism is a key economic driver and it is on the rise', [online], available: <https://www.southafrica.net/gl/en/trade/press/economic-impact-of-the-tourism-sector-tourism-is-a-key-economic-driver-and-it-is-on-the-rise> [Accessed December 2024 2024].

Enhancing Event Quality Through Mystery Shopping: Integrating Theoretical and Practical Perspectives

Johanna Heinonen^{1,2} and Maria Murto¹

¹LAB University of Applied Sciences, Lahti, Finland

²University of Eastern Finland, Joensuu, Finland

johanna.heinonen@uef.fi

maria.murto@lab.fi

Abstract: While the SERVQUAL model by Parasuraman et al. (1988) provides a robust framework for assessing service quality through dimensions such as tangibles, reliability, responsiveness, assurance, and empathy, its practical application to live events remains underexplored. Pine and Gilmore's (1998) concept of the "experience economy" underscores the importance of creating memorable customer experiences. However, traditional methods often fail to capture detailed and objective insights. Deming's (2000) Plan-Do-Check-Act (PDCA) cycle emphasises continuous improvement, aligning well with the mystery shopping method, which offers actionable feedback in refining event planning and execution for this case. However, there is a lack of research on how mystery shopping can be systematically applied to evaluate and enhance live event experiences. Furthermore, while Kotler et al. (2016) highlight the importance of effective customer feedback mechanisms, there is a gap in understanding how mystery shopping can provide granular insights from initial contact to post-event follow-up, thereby supporting continuous improvement and addressing SERVQUAL dimensions. Solomon (2019) stresses the need to understand consumer behaviour, particularly given the significant financial and emotional investments involved in events. Nevertheless, there is limited research on how real-time observations of behaviour and interactions, as captured through mystery shopping, can be utilised to improve the event experience. This study aims to fill these gaps by exploring how student engagement and cooperation in the mystery shopping process can enhance the evaluation and quality of live events across all phases of the customer journey. The research followed a structured methodology based on Morrison et al. (1997) and Curri-Mehmeti (2020), starting with brainstorming and defining the objectives of the mystery shopping experiment in April 2024. The study evaluated events from the customer journey perspective, covering pre-event, arrival, during-event, and post-event phases. Specific evaluation criteria were developed, and a Webropol online survey with 28 questions, including 12 open-ended ones, was used to gather detailed feedback. Six voluntary participants from LAB University of Applied Sciences were recruited and trained as mystery shoppers. They evaluated various events in South Karelia, providing insights into service quality, customer experience, and operational efficiency. The data collection spanned from June to August 2024, with students submitting evaluations and photos to verify their attendance. This methodology ensured comprehensive and actionable feedback for event organisers while offering students practical learning opportunities. Findings indicate that mystery shopping yields objective feedback on customer experiences, guiding strategic decisions and enhancing training. It identifies behaviours affecting customer satisfaction and promotes continuous improvement. Using technology can further enhance feedback accuracy. This study shows that mystery shopping is an effective tool for evaluating and improving event service quality, offering actionable insights for organisers and enriching students' learning experiences by linking theory with real-world applications.

Keywords: Service quality, Customer experience, Mystery shopping, Event management, Student engagement

1. Introduction

Customer satisfaction and service quality are vital in determining an event's success. However, conventional assessment approaches lack thorough and unbiased evaluation. The SERVQUAL model (Parasuraman et al., 1988) outlines important service components but has limited use in live events. Additionally, Deming's PDCA cycle incorporates principles of continuous improvement, while Pine and Gilmore's (1998) experience economy exerts the importance of having an unforgettable customer interaction. As Kotler et al. (2016) argue, mystery shopping captures minute details, provides feedback in real-time and helps cover gaps in marketing, services offered, and programs undertaken, thus improving the overall experience. It also aids in understanding consumer behaviour (Solomon, 2019). By looking through these lenses, event professionals can sequentially appreciate the event experience from the points of all attendees and improve how the experience is created and fostered.

This research explores *how student engagement and cooperation can enhance the evaluation and quality of live events by addressing every phase of the customer journey: pre-event, arrival, during-event, and post-event*. The study collects insights on service quality, customer experience, and operational efficiency using the mystery shopping method by analysing respondents' backgrounds, preconceptions, and direct interactions during these phases. By investigating the mystery shopping process, the research identifies gaps in event marketing, infrastructure, and service delivery while examining how respondent demographics, pre-event expectations, arrival logistics, and during-event experiences influence overall satisfaction and post-event reflections. The aim

is to generate actionable recommendations for event organisers and assess the feasibility and effectiveness of utilising students as evaluators.

Incorporating the SERVQUAL model within the mystery shopping exercise illustrates an application of theory through practical, hands-on learning. Students learn to skillfully resolve business problems and evaluate service quality through observational analysis, critical thinking, and customer interaction analysis. Moreover, they assess the demographic and event preference responses to structure the analysis within the context of consumer behaviour, increasing engagement, knowledge retention, and professional skill acquisition. The research gives the event organisers practical measures for enhancing service quality and customer satisfaction. Moreover, the procedure is particularly beneficial for improving the academic and practical implications of the mystery shopping process.

2. Customer Journey in Events

The event customer journey encompasses the entire attendee experience, from awareness and registration to post-event follow-up. Optimising this journey is key to enhancing satisfaction and loyalty, making it a shared responsibility for event organisers. A deeper understanding fosters commitment to improving each touchpoint for a better overall experience.

Pre-Event Phase

The pre-event phase shapes the attendee experience, covering interactions before the event. Key elements include marketing, registration, and pre-event communication, all crucial for setting the right expectations and engagement. Effective marketing strategies are essential to attract potential attendees. Research by Hollebeek et al. (2019) suggests that personalised marketing and targeted promotions significantly enhance attendee engagement. The registration process should be seamless and user-friendly, as complex or time-consuming registration processes can deter potential attendees (Wong et al., 2019). Pre-event communications, such as emails and social media updates, help build anticipation and provide necessary information to attendees (Bladen et al., 2022).

During-Event Phase

The during-event phase is the core of the attendee experience, covering entry, navigation, engagement, and interactions. It directly impacts satisfaction as the event's value is delivered, making it crucial for organisers to manage effectively. Entry and navigation should be well-organized to ensure a smooth flow of attendees. Signage and assistance from event staff are critical for helping attendees navigate the venue (Bladen et al., 2022). Engagement with activities and sessions forms the core of the event experience. Various engaging and relevant activities ensure that attendees find value in their participation (Getz & Page, 2019). Staff interactions also play a significant role; friendly and knowledgeable staff can enhance the overall experience (Grissemann et al., 2013).

Post-Event Phase

The post-event phase includes follow-up communications and feedback collection. Effective follow-up can reinforce positive experiences and address any issues that may have arisen. Follow-up communications should thank attendees for participating and provide information on future events (Bladen et al., 2022). Collecting feedback through surveys helps organisers understand what worked well and what needs improvement. According to Lovelock and Patterson (2015), timely feedback collection and addressing concerns promptly can significantly enhance future attendee satisfaction.

3. Mystery Shopping

Definition and relevance

Mystery shopping is often used in retail and hospitality to evaluate service quality from the customer's viewpoint (Wilson, 1998). It helps organisations pinpoint areas where they excel and improve upon their shortcomings. Over time, methodologies changed to enhance the precision and dependability of the data (Finn & Kayande, 1999; Curri-Mehmeti, 2020). The method gives objective assessments, helps train staff, and enhances the ethic of continuous improvement and responsibility (Wiele et al., 2005; Wilson, 1998; Woodside et al., 2020). These techniques also help inform strategic choices by spotting trends in customer behaviours that are extremely important in competitive markets (Morrison et al., 1997). Videotaping and reporting in real-time are modern techniques that increase feedback accuracy (Zhao & Di Benedetto, 2013). Moreover, telephone and web

mystery shopping are essential tools for analysing the quality of digital services, particularly for assessing the site's response time and functionality (Finn & Kayande, 1999; Morrison et al., 1997; Strähle, 2013).

Methods of Mystery Shopping

The approaches to mystery shopping differ based on the research objectives and the type of business. Mystery shoppers traditionally conduct direct observations of people through in-person visits where employees are engaged, surroundings are checked, and the quality of service is rated (Wilson, 1998). Such visits may be structured, where checklist guidance is there for consistency or unstructured (Minghetti & Celotto, 2014). Mystery shopping is used to study various activities, including service delivery, employee training, and the customer journey (Wilson, 2001; Allison et al., 2010; Halvorsrud et al., 2016). It enables an anthropologist to study people in their natural environment (Allison et al., 2010). Such designs are supplemented with SERVQUAL, or Deming's PDCA cycle, which restates the importance of cannot be overstated in continuously enhancing the experience that customers receive (Parasuraman et al., 1988; Deming, 2000; Pine & Gilmore, 1998). Mystery shopping is also critical in evaluating the service quality during the various stages of events.

It consists of several defined and precise steps to collect reliable, accurate, and valid information on the customer journey (Table 1). The program about the mystery shopping process starts with an important step of program design where the objectives are set to satisfy some business issues like assessing the quality of customer service, carrying out compliance checks, or ascertaining the level of training (Wilson, 2017). These objectives' comprehensive and measurable evaluation criteria include customers' greetings, product understanding, and even response time (Parasuraman et al., 1988).

The recruitment and training of mystery shoppers are fundamental to ensuring reliable evaluations. These individuals, representing typical customers, undergo training to observe and report objectively, maintaining consistency in assessments (Minghetti & Celotto, 2014). During visits, mystery shoppers follow a structured methodology, interacting anonymously to provide unbiased evaluations (Brito & Rambocas, 2016). Afterwards, they submit detailed reports, analysed using quantitative and qualitative methods to identify patterns and areas for improvement (Jacob et al., 2018).

Findings are compiled into comprehensive reports with actionable recommendations, helping businesses enhance service quality, staff training, and customer satisfaction (Morrison et al., 1997; Curri-Mehmeti, 2020).

Table 1: Steps in Mystery Shopping (Morrison et al., 1997; Curri-Mehmeti, 2020)

Designing the Mystery Shopping Program	The first step in the mystery shopping process is designing the program. This involves defining the objectives of the mystery shopping exercise, which could range from evaluating customer service and measuring compliance with company standards to identifying training needs (Wilson, 2001). Clear objectives ensure the mystery shopping program is tailored to meet business needs.
Developing Evaluation Criteria	Based on the objectives, specific evaluation criteria are developed. These criteria typically include aspects of service quality such as greeting customers, product knowledge, response times, and overall customer interaction (Parasuraman et al., 1988). The criteria should be comprehensive, measurable, and aligned with the company's service standards.
Recruiting and Training Mystery Shoppers	Recruiting and training mystery shoppers is crucial for the success of the program. Mystery shoppers should represent the typical customer demographic and be trained to observe and report objectively. Training ensures shoppers understand the evaluation criteria and are consistent in their assessments (Minghetti & Celotto, 2014).
Conducting Mystery Shopping Visits	Mystery shoppers carry out their assignments according to the predefined methodology. They visit, call, or interact with the business as typical customers, carefully noting their experiences and observations. The methodology ensures that the visits are conducted anonymously and without bias (Brito & Rambocas, 2016).
Data Collection and Analysis	After completing their assignments, mystery shoppers submit detailed reports based on their experiences. These reports are collected and analysed to identify patterns, strengths, and areas for improvement. Data analysis may involve quantitative methods, such as scoring and statistical analysis, and qualitative methods, such as thematic analysis of written feedback (Lim et al., 2023).
Reporting and Action Planning	The final step involves compiling the findings into a comprehensive report. The report should highlight key insights, trends, and actionable recommendations. Businesses use these insights to develop action plans to improve service quality, train staff, and enhance customer satisfaction (Morrison et al., 1997).

However, the effectiveness of mystery shopping depends on the rigour and objectivity of the methodology employed. Critics argue that mystery shopping can sometimes produce biased or unrepresentative results if the mystery shoppers' interactions are not typical of regular customer experiences (Wilson, 1998). To mitigate this

risk, it is crucial to ensure that mystery shoppers are well-trained and that the evaluation criteria are comprehensive and aligned with the business's service standards (Finn & Kayande, 1999; Wiele et al., 2005).

4. Research Methodology

This research employed a predominantly quantitative approach, incorporating some qualitative elements through open-ended questions and following the steps in Table 1 by Morrison et al. (1997) and Curri-Mehmeti (2020). The process started in April 2024 by brainstorming and defining the mystery shopping experiment's objectives and discussing its implementation (e.g. Morrison et al., 1997; Wilson, 1998).

The next step involved deciding the focal points of the study and developing specific evaluation criteria (e.g. Wilson, 1998; Morrison et al., 1997). This research aimed to study events from the customer journey perspective, starting from the information search and proceeding to the visit to the event and using services there. After the visit, the aftermath experiences and feedback issues were also analysed. These points were designed to gather feedback on the overall experience, including the quality of service, the customer's likelihood to recommend the event, and any suggestions for improvement. The study utilised a single instrument, a Webropol online survey, which included 28 questions—12 of which were open-ended—covering the pre-event, arrival, during-event, and post-event phases. (Table 2). Data coding was performed manually, with measures in place to ensure consistency. Responses were categorised and analysed using thematic analysis to identify common themes and insights. Quantitative data were analysed using descriptive statistics to summarise the findings.

Table 2: Customer journey in the questionnaire

Respondent information	GDPR consent	These aimed to understand how the respondent's background might affect his/her answers and perception.
	Email address	
	Age	
	Gender	
	Field of Study	
	What kind of events do you most often participate in?	
	How often do you usually attend events with an entrance fee in a year?	
Background information	Which event are you going to evaluate?	Pre-experiences ' in this paper meant any previous experiences the respondent might have had with similar events or services. These experiences could influence their expectations, perceptions, and feedback.
	When are you going to the event?	
	Have you been to a similar kind of event earlier?	
	Evaluate the themes influencing your decision to attend an event.	
Before event	Where can you find information about the event online?	This part concentrated on online mystery shopping to see whether there is enough information online and how the information online affects the expectations.
	Evaluate the website (if the event has one)	
	Open feedback	
	Do you think the information and communication about the event were sufficient?	
	What expectations or perceptions did the event's marketing develop in you?	
Arriving at the event	What time did you arrive at the event?	These questions figured out the infrastructure, public transportation, parking possibilities, and guidance for the event, which all affect the visitor's experience and the mood in which they enter the event.
	What is the weather like in the event?	
	Did you come to the event alone or with someone?	
	How was the journey to the event?	
	Describe your first encounters or feelings upon arriving at the event area.	
During event	Evaluate the following factors in the event.	
	Open feedback	

	Ask for help from a staff member at the event. Describe briefly the encounter and the task. How would you evaluate the interaction with the staff member?	With these questions, respondents provided information about the event itself and the customer service.
After event	Was there a feedback survey, or is there a possibility of offering feedback to the organisers?	These questions helped to understand if events gather any feedback and, on the other hand, encouraged respondents to reflect on their experience afterwards.
	What do you think about the event after visiting?	
	Did the event meet your expectations?	
	What were the strengths and weaknesses of the event?	
	To whom would you recommend this event?	
	Attach two pictures (or more) of the event that could illustrate your evaluation.	
Pedagogical and professional	To whom would you recommend this event?	The last part gathered information about the experiment and encouraged respondents to consider how they can use mystery shopping and its learnings in their future lives.
	What kind of feedback would you give us to develop the mystery shopping concept?	

Convenience sampling was used to recruit six voluntary participants from the LAB University of Applied Sciences. These students were selected based on their availability and willingness to participate rather than representing the entire student body of nearly 10,000. Since this was the pilot study for future actions, it was considered that the selection of six students justified the study's scope. The chosen students had diverse international backgrounds, with half residing in the same area where the events occurred.

Table 3: Respondents

Respondent nr	Gender	Age	Study program	Event
R1	Female	19	Tourism	Imatra Big Band Festival
R2	Non-binary	24	Design	Black and White International Theatre Festival
R3	Female	25	Design	Black and White International Theatre Festival
R4	Female	23	Design	Kumaus Festival
R5	Male	**	Business	Vallijamit Music Festival
R6	Female	29	Business	Lappeenranta Wine Festival

The chosen ones were trained and informed of their duties. Students could choose their event among five options organised in South Karelia: Imatra Big Band, Vallijamit Music Festival, Kumaus Festival, and Lappeenranta Wine Festival. Also, the Black and White International Theatre Festival was on the list, but unfortunately, the students cancelled their attendance. However, these two participants did the pre-study of the event and are thus included as respondents. The aim was that the chosen events would represent both big and small events around South Karelia. Also, the Webropol questionnaire was introduced and explained. Besides answering the questions, the students were asked to send at least two pictures from the event to prove their presence at the event. The students could get compensated for the entrance fee after finishing the evaluation. The data from the event were collected between June 2024 and August 2024.

5. Findings

Before event

Information availability significantly influenced attendees' expectations, with experiences varying across events. Respondents accessed event websites and social media, with some also relying on local event calendars and municipal sites. However, the sufficiency of information was inconsistent. A participant evaluating the Kumaus Festival noted, "The websites are visually appealing but lack essential details like contact information and clear schedules" (R4). Similarly, a Black and White International Theatre Festival respondent stated, "I found it difficult to locate public transport guidance, which would have been helpful" (R2). The absence of English-language content was a barrier for international participants at the Lappeenranta Wine Festival: "The lack of English translations made it hard for me to understand the event details" (R4) entirely.

Arriving at the Event

Arrival experiences varied widely depending on the event. At the Imatra Big Band Festival, one respondent shared, "The first impression of the venue was great; staff were friendly, and the directions were clear" (R1). However, logistical challenges were noted at other events, such as unclear signage and ticketing issues at the Black and White International Theatre Festival: "I could not buy a ticket to the festival because of unclear signage and instructions" (R2). These differences highlight the importance of tailored arrival planning to meet attendee needs. Solomon (2019) emphasises understanding consumer behaviour, noting that events involve significant financial and emotional investments. Mystery shopping captures real-time observations of behaviour and interactions, offering valuable data to improve the event experience.

During the Event

Safety and cleanliness were praised across all events, though the quality of interactions and programming varied. At the Lappeenranta Wine Festival, a respondent commented, "The staff were friendly but did not seem well-informed when I asked about recycling points" (R6). By contrast, an Imatra Big Band Festival respondent reflected, "Engaging activities made the event enjoyable and met most of my expectations" (R1). Some events faced challenges in aligning programming with attendee expectations. For example, a participant at the Kumaus Festival remarked, "I expected more variety in the programming; the activities were too limited" (R4). Combining all previously mentioned perspectives enables event organisers to effectively manage and enhance the customer journey, ensuring every touchpoint contributes to a positive and memorable experience.

After the Event

The approach to feedback collection differed significantly across events. Some events provided formal surveys, while others lacked structured mechanisms for gathering attendee impressions. A Black and White International Theatre Festival participant remarked, "It is good that there was a survey to answer, but more structured questions on logistics would help" (R2). Additionally, weather and logistical issues impacted overall impressions; a respondent at the Lappeenranta Wine Festival noted, "Despite the bad weather, the event was well-organized, but a post-event email with highlights or plans would have been appreciated" (R6).

Pedagogical Perspective

Students' learning experiences were enriched by the diversity of events they evaluated, each offering unique insights. For instance, a participant evaluating the Kumaus Festival reflected, "I liked this experience a lot; it made me focus on details I would have overlooked otherwise" (R4). At the Imatra Big Band Festival, a respondent shared, "Evaluating the event taught me how to consider both operational and customer satisfaction aspects, which will be useful in my career" (R1). These experiences gave students critical thinking and analytical skills while deepening their understanding of event management and customer engagement.

6. Conclusions and Future Research

This study addressed the research question: *How can student engagement and cooperation be used to evaluate and enhance the quality of live events across the customer journey?* The purpose was to explore the effectiveness of mystery shopping as a tool for assessing service quality, customer experience, and operational efficiency while providing educational benefits for students. By integrating theoretical frameworks with practical applications, the study sought to generate actionable insights for event organisers and deepen student learning.

This study underscores the value of mystery shopping as a tool for evaluating and enhancing service quality in event management. Integrating academic frameworks, such as SERVQUAL, the experience economy, and PDCA, with practical applications highlights the mutual benefits for event organisers and students. Despite its limitations, the research offers actionable insights for improving the customer journey, fostering innovation, and advancing educational practices. As the industry evolves, mystery shopping will remain a versatile method for bridging theoretical knowledge and real-world application.

Theoretical Contribution

The study significantly contributes to understanding how theoretical frameworks can inform and improve event management practices. The SERVQUAL model (Parasuraman et al., 1988) provided a foundation for identifying deficiencies in service dimensions, such as tangibles, reliability, responsiveness, assurance, and empathy, highlighted in the mystery shopping evaluations. These insights reinforce the model's relevance for assessing customer service in live event settings.

Pine and Gilmore's (1998) "experience economy" framework underpinned the analysis of event programming and attendee engagement, emphasising the importance of creating memorable experiences. Events that aligned their activities with audience expectations were more successful in delivering these experiences, validating the framework's emphasis on value-driven customer interactions.

Deming's (2000) PDCA cycle informed the iterative improvement process by highlighting the role of structured feedback mechanisms in refining event planning and execution. This aligns with Kotler et al.'s (2016) emphasis on effective feedback systems, underscoring mystery shopping as a critical tool for continuous improvement. Solomon's (2019) perspective on consumer behaviour further complemented the analysis by providing insights into how customer expectations and emotional investments influence overall satisfaction.

Managerial Implications

Mystery shopping proved an effective method for capturing detailed insights across all customer journey phases. Pre-event communication, on-site navigation, and post-event engagement emerged as critical areas for improvement, consistent with Bladen et al. (2022). This information helps events actively address service delivery gaps, such as improving staff training and ensuring the consistency of event programming.

Integrating logistical feedback, such as the accessibility of recycling points, aligns with broader sustainability goals highlighted in Getz and Page (2019). Mystery shopping offers a cost-effective alternative to traditional feedback mechanisms by providing detailed, actionable insights. Additionally, incorporating students as mystery shoppers reduces costs and fosters collaboration between academia and industry, equipping students with practical observational analysis and customer evaluation skills.

Also, mystery shopping proved beneficial in bridging theoretical learning with practical application. Students gained hands-on experience by applying frameworks such as SERVQUAL (Parasuraman et al., 1988), Pine and Gilmore's (1998) experience economy, and Deming's (2000) PDCA cycle to real-world evaluation, developing their observational analysis, critical thinking, and customer interaction assessment. Students appreciated the opportunity to reflect on operational details and customer satisfaction, which enhanced their understanding of service quality across different customer journey phases. This also provided value in active learning, aligning with Kolb's experiential learning theory (1984), and highlighted how practical assignments like mystery shopping can foster deeper engagement and professional readiness.

Evaluation of the Study

This study successfully combined theoretical models and practical applications, demonstrating the value of mystery shopping for event evaluation and student learning. However, several limitations must be acknowledged. The sample size was relatively small, limiting the generalizability of the findings. Expanding the study to include a more extensive and diverse set of events would enhance its scope. The reliance on students as evaluators introduced potential biases, as their interpretations and expectations may differ from those of typical attendees despite training designed to standardise evaluations. Additionally, the study did not assess the long-term impact of mystery shopping feedback on event quality, leaving a gap in understanding its sustained effects.

Future Research

Future research could build on this study by including diverse event types, such as virtual and hybrid formats, to explore how mystery shopping adapts to different contexts. Technological advancements, including mobile applications and AI-based analytics (Zhao & Di Benedetto, 2013), could further enhance the accuracy and immediacy of evaluations. Longitudinal studies would help assess the lasting effects of mystery shopping feedback on event quality and customer loyalty. Comparative analyses with other feedback mechanisms, such as traditional surveys or focus groups, could provide additional insights into the relative strengths and weaknesses of mystery shopping.

References

- Allison, P., Severt, D., & Dickson, D. (2010). A Conceptual Model for Mystery Shopping Motivations. *Journal of Hospitality Marketing & Management*, 19(6), 629–657.
- Bladen, C., Kennell, J., Abson, E. & Wilde, N., (2022). *Events management: An introduction*. Routledge.
- Brito, P. Q., & Rambocas, M. (2016). Assessing the impact of mystery client traits on service evaluation. *The Journal of Services Marketing*, 30(4), 411–426.

- Curri-Mehmeti, A. (2020). Mystery shopping – A process of understanding consumers opens the space for creating contemporary competitive trends. *Economic vision. International Scientific Journal in Economics, Finance, Business, Marketing, Management and Tourism*, 7(13–14), 22–27.
- Deming, W. E. (2000). *Out of the crisis*. MIT Press.
- Finn, A., & Kayandé, U. (1999). Unmasking a phantom: A psychometric assessment of mystery shopping. *Journal of Retailing*, 75(2), 195–217.
- Getz, D. & Page, S.J., (2019). *Event studies: Theory, research and policy for planned events*. Routledge.
- Grisseemann, U., Plank, A., & Brunner-Sperdin, A. (2013). Enhancing business performance of hotels: The role of innovation and customer orientation. *International Journal of Hospitality Management*, 33(1), 347–356.
- Halvorsrud, R., Kvale, K., & Følstad, A. (2016). Improving service quality through customer journey analysis. *Journal of Service Theory and Practice*, 26(6), 840–867.
- Hollebeek, L. D., Srivastava, R. K., & Chen, T. (2019). S-D logic–informed customer engagement: integrative framework, revised fundamental propositions, and application to CRM. *Journal of the Academy of Marketing Science*, 47(1), 161–185.
- Jacob, S., Schiffino, N., & Biard, B. (2018). The mystery shopper: A tool to measure public service delivery? *International Review of Administrative Sciences*, 84(1), 164–184.
- Kotler, P., Keller, K. L., Brady, M., Goodman, M., & Hansen, T. (2016). *Marketing management* (3rd edition.). Pearson.
- Lim, A., Krishnan, S., Singh, H., Furletti, S., Sarkar, M., Stewart, D., & Malone, D. (2023). Linking assessment to actual life practice – comparing work-based assessments and objective structured clinical examinations using mystery shopping. *Advances in Health Sciences Education: Theory and Practice*.
- Lovelock, C. & Patterson, P., (2015). *Services marketing*. Pearson Australia.
- Minghetti, V., & Celotto, E. (2014). Measuring Quality of Information Services: Combining Mystery Shopping and Customer Satisfaction Research to Assess the Performance of Tourist Offices. *Journal of Travel Research*, 53(5), 565–580.
- Morrison, L. J., Colman, A. M., & Preston, C. C. (1997). Mystery customer research: Cognitive processes affecting accuracy. *International Journal of Market Research*, 39(2), 349–361.
- Parasuraman, A., Zeithaml, V. A., & Berry, L. L. (1988). SERVQUAL: A Multiple-Item Scale for Measuring Consumer Perceptions of Service Quality. *Journal of Retailing*, 64(1), 12–.
- Pine, B. J., & Gilmore, J. H. (1998). Welcome to the experience economy. In *Harvard Business Review* (Vol. 76, Issue 4, pp. 97–105). Harvard Business School Publishing Corporation.
- Solomon, M. R. (2019). *Consumer behaviour: a European perspective* (Seventh edition.). Pearson Education.
- Strähle, J. (2013). Online fashion shopping: mystery shopping-based evaluation of online German fashion stores. *Journal of Global Fashion Marketing*, 4(3), 193–210.
- Wiele, T. V. der, Hesselink, M., & Iwaarden, J. V. (2005). Mystery shopping: A tool to develop insight into customer service provision. *Total Quality Management & Business Excellence*, 16(4), 529–541.
- Wilson, A. M. (1998). The Use of Mystery Shopping in the Measurement of Service Delivery. *The Service Industries Journal*, 18(3), 148–163.
- Wilson, A. M. (2001). Mystery shopping: Using deception to measure service performance. *Psychology & Marketing*, 18(7), 721–734.
- Wong, I. A., Xu, Y. H., Tan, X. S., & Wen, H. (2019). The boundary condition of travel satisfaction and the mediating role of destination image: The case of event tourism. *Journal of Vacation Marketing*, 25(2), 207–224.
- Woodside, A. G., Caldwell, M., & Calhoun, J. R. (2020). Service breakdown prevention: Delivering requisite variety and training for achieving a highly reliable service organisation. *International Journal of Contemporary Hospitality Management*, 32(2), 889–912. <https://doi.org/10.1108/IJCHM-02-2019-0152>
- Zhao, Y. L., & Di Benedetto, C. A. (2013). Designing service quality to survive: Empirical evidence from Chinese new ventures. *Journal of Business Research*, 66(8), 1098–1107. <https://doi.org/10.1016/j.jbusres.2012.03.006>

The Relationship Between the Perception of Environmental Pollution With the Tourist Experience of Visitors to Chimbote Bay

Marcia Cabala Hernandez¹, Cecilia Rivas Medina¹, Rocio Salas Laines¹ and Sandra Cherro Osorio²

¹School of Hospitality and Tourism Management, Universidad Peruana de Ciencias Aplicadas, Lima, Peru

²Business and Construction Department, Melbourne Polytechnic, Melbourne, Victoria, Australia

marcia_cabala@outlook.com

ana.rivas@upc.pe

rocioslai@gmail.com

sandraosorio@melbournepolytechnic.edu.au

Abstract: Several studies have addressed the impact of tourism on the environment, but few have focused on how the environment can influence the tourism activity and visitor's experience. Visitors' perceptions of environmental contamination could pose a significant barrier to the optimal development and success of tourism destinations. This is the case of the Chimbote Bay, that has - high levels of contamination due to industrial activity and untreated waste. The main objective of this research was to determine the relationship between the perception of environmental pollution and the tourist experience and in intention to revisit Chimbote Bay. A mixed methodology was employed with the qualitative phase following an interpretative design and the quantitative phase used a non-experimental correlational design. The results showed that visitors to the destination perceived three types of environmental pollution in the bay namely air, water and soil, which highlighted the evidence of an environmental problem in the area. The study also determined an inverse relationship existed between the perception of environmental pollution with the tourist experience. As the perception of pollution increased, the tourist experience decreased. Similarly, an increased perception of environmental pollution reduced the intention to revisit the bay.

Keywords: Chimbote Bay, Coastal destination, Environmental pollution, Intention to revisit, Peru, Tourist experience

1. Introduction

In recent years, environmental pollution has become a global issue as it affects ecosystems, air, water and soil causing mortality among human populations. This phenomenon is defined as the presence of substances that degrade water, soil or air harming senses such as sight, taste or smell, and posing a health hazard (United States Environmental Protection Agency [EPA], n.d).

The tourism sector is heavily reliant on the environment so any negative impact on it will likely lead to a decline of visitation (Eusébio *et al*, 2020) and disruption on tourism development). Environmental pollution, for instance, impacts directly the image of a destination affecting the experience and satisfaction of tourists in a negative way (Huiming *et al*, 2020).

Coastal destinations are globally regarded as attractive to tourists because their natural surroundings and favourable climate. Previous studies, however, have identified that environmental pollution undermines the enjoyment of tourists due to perceptions of poor cleanliness (Castillo *et al*, 2022; Huiming *et al*, 2020). Considering that experiences related to the environment determine the tourist's attitude towards a destination, polluted coastal destinations cause tourist dissatisfaction making their stays shorter and the likelihood of revisiting lower (Huiming *et al*, 2020).

Previous studies have examined the impact of environmental pollution on tourism activities and its effects on ecosystems, however, few studies have explored the relationship between the perception of environmental pollution and the tourist experiences, particularly in coastal destinations (Eusébio *et al*, 2020; Huiming *et al*, 2020; Nabirye, 2018). Hence, this study aimed to explore the relationship between perceived environmental pollution and the tourist experience, and the intention to revisit a coastal destination.

This study is situated in Peru, a country with 2,250 km Pacific coastline, offering a wide array of coastal destinations. In the 1950s, Chimbote Bay was a popular sun-and-beach destination (Loayza, 1998). However, by the 1970s, overexploitation of marine resources and pollution from fish meal and oil factories, fish canning plants, and steel production had severely degraded its environment. As a result, it is now considered one of the most polluted coastal areas in the country (Grandez, 2017). This high level of pollution has caused loss of biological diversity and disappearance of scenic qualities (Loayza, 2022). Chimbote, often called "the city that

smells like fish," has long been avoided by both locals and tourists due to its reputation (Cajusol, 2023). However, its thriving fishing, industrial, commercial, and service sectors have gradually attracted people back over time. In 2022, Chimbote welcomed 437,097 domestic visitors (Dirección Sub Regional de Comercio Exterior y Turismo-Chimbote, 2023).

The main objective of this research was to determine the relationship between the perception of environmental pollution and the tourist experience and intention to revisit Chimbote Bay. For this purpose, three specific objectives were outlined as (i) establish the levels of visitor's perception of the types of environmental pollution (ii) determine the relationship between the types of pollution perceived and the visitor's tourist experience on the bay, and (iii) determine the relationship between the visitor's perception of environmental pollution and the intention to revisit. The results of this research expect to offer valuable insights into the relationship between the perception of environmental pollution, the tourist experience and the intention to revisit a coastal destination.

2. Literature Review

2.1 The Perception of Environmental Pollution and its Relationship With Tourism in Coastal Destinations

Environmental pollution impacts natural resources by diminishing their quality particularly, ecosystems and their elements such as fauna, flora, water, soil and air. Considering that the tourism industry relies on the environment as a source of activities and recreation for tourists, any issues such as destruction of biological diversity or pollution would hinder its development (Amobonye *et al*, 2023). Depletion of natural resources in tourism destinations, for instance, has an impact on the sustainable growth of the place (Chien *et al*, 2022).

In the tourism sector, pollution levels serve as key sustainability indicators for governments, companies and communities. As a result, effective ecosystems management is crucial for the long-term sustainability of the sector (Kusumawati *et al*, 2020). In coastal environments, solid waste in the sea specially plastics significantly reduces the destination's appeal (Aparicio-Serrano and Mate-Sanchez-Val, 2022); soil contamination impairs cleanliness and aesthetics on coastal areas (Huiming *et al*, 2020); and air pollution impacts tourism activities because is perceived as a health risk (Kang *et al*, 2020).

2.2 Visitor Reactions to Pollution in Tourist Destinations

Nowadays, a growing number of tourists prefer destinations that offer activities designed to protect and preserve ecosystems. Consequently, tourists tend to avoid severely polluted coastal destinations because the environmental damage diminishes their value and overall appeal (Eusébio *et al*, 2020; Kusumawati *et al*, 2020; Nabirye, 2018). Furthermore, tourists often made subjective assessments when avoiding high polluted destinations considering the potential negative impacts on their health (Aparicio-Serrano and Mate-Sanchez-Val, 2022; Landowski *et al*, 2020).

Perceptions of the environmental condition of coastal zones are not well understood; however, they are likely influenced by personal experience, word of mouth, media coverage, and reports from travel agencies (Cox *et al*, 2003). Few empirical studies have examined visitors' perceptions of various types of environmental pollution in coastal destinations. Most research have focused on a single aspect such as air pollution (Bogalecka and Grobelna, 2023), debris or litter (Krelling *et al*, 2017) and water pollution (Lee and Lee, 2015). In contrast, this study will consider three types of environmental pollution in tourists' perceptions. Hence, the first research question is:

RQ1: What are the types and levels of pollution perceived by tourists visiting Chimbote bay?

2.3 The Tourist Experience and its Elements

Tourist experiences are influenced by the perceived quality of factors including infrastructure, facilities, cleanliness, safety, hospitality and authenticity (Maunier and Camelis, 2013). The tourist experience cycle begins with information gathering, followed by selecting a suitable destination, planning the trip, experiencing the location and reflecting on the possibility of revisit (Godovykh and Tasci, 2020). The decision-making process is influenced by tourist's image of the destination that is shaped by their expectations and prior experiences (Landowski *et al*, 2020). Additionally, the quality of the experience can impact satisfaction levels leading to either positive or negative feelings about the destination (Huang *et al*, 2019; Nabirye, 2018).

Klaus *et al* (2022) identify five key elements of the tourist experience: reverie, tourist landscape, reflection, transformation, and enjoyment. Reverie, or daydreaming, refers to the feeling of escaping to another reality, influenced by sensory stimuli such as the natural environment, climate, sounds, aromas, and colors of the

destination. Tourist landscape encompasses the physical characteristics of the place, including its natural surroundings and environmental conditions, which shape tourists' perceptions. Reflection involves travelers assessing their personal growth during the trip while also considering the destination's sustainability. Transformation relates to the knowledge and learning acquired during the journey, fostering curiosity and a deeper understanding of the place visited. Finally, enjoyment depends on individual preferences and the level of satisfaction with activities, influencing how entertaining and fulfilling the experience is.

2.4 The Relationship of Environmental Pollution to the Five Elements of the Tourism Experience

Tourists are attracted to destinations with higher environmental quality but when environmental damage occurs, it affects each of the five elements of the tourist experience. The first element, reverie, is influenced by perceptions of pollution which diminishes the destination's value and reduce its appeal when tourists consider places to visit (Kusumawati *et al*, 2020). Pollution damages the environmental conditions of the tourism landscape, a deterioration that is perceived through the senses: sight, taste, smell, hearing and touch (Godovykh and Tasci, 2020). Signs of pollution could be perceived as lack of sustainable actions to preserve the environment which have a direct impact on the element of reflection (Castillo *et al*, 2022). Transformation occurs when tourists perceive that protective actions to mitigate pollution have been effective or not potentially leading to a caring attitude towards a destination (Kusumawati *et al*, 2020) or raising awareness in third parties (Chih *et al*, 2023). The enjoyment element may be diminished by environmental pollution which can adversely impact on tourist activities. High air pollution can negatively affect tourists' mood by impairing sight and breathing (Kang *et al*, 2020).

2.5 Pollution in Coastal Destinations and its Relation to the Tourist Experience

Pollution in coastal destinations significantly impacts the tourist experience. Key factors like climate, beaches, and the natural environment shape satisfaction, but environmental quality—air, water, and soil—is crucial due to tourists' direct interaction with their surroundings. Pollution, including debris and water contamination, disrupts recreational activities and diminishes overall enjoyment, affecting the quality of the visitor experience (Dzitse *et al*, 2023).

The second research question is:

RQ2: What is the relationship between visitors' perception of environmental pollution and each one of the elements of the tourist experience?

2.6 Effects of the Perception of Environmental Pollution in Tourist Destinations: Reduction of Stay and Revisit

Recollection of previous experiences, particularly negative ones, can significantly influence tourists' decisions (Huang *et al*, 2019) including whether to revisit a destination (Nabirye, 2018). Pollution, for instance, had adverse effects on visitors' experiences and their intention to revisit (Cajusol, 2023; Chien *et al*, 2022). Therefore, perceptions contribute to the tourist's decision-making process (Santos *et al*, 2020). For this reason, the third research question is:

RQ3: Which is the relationship between the visitor's perception of environmental pollution of Chimbote Bay and the intention to visit or revisit?

3. Methodology

The main objective of this research was to determine the relationship between the perception of environmental pollution and the tourist experience and intention to revisit Chimbote Bay. The specific objectives were (i) to establish the levels of visitor's perception of the types of environmental pollution (ii) to determine the relationship between the types of pollution perceived and the visitor's tourist experience on the bay, and (iii) to determine the relationship between the visitor's perception of environmental pollution and the intention to revisit.

The limited number of previous studies exploring the relationship between environmental pollution and the tourist experience has created a gap in the literature. This exploratory study aimed to better understand the issue of environmental pollution at a coastal destination in Peru. To achieve this, a qualitative methodology was initially employed to explore the problem in depth. Following this, quantitative research was conducted to measure relationships between variables identified in the first phase (Truong *et al*, 2020). This mixed method approach provided a more effective way to address the research objectives and offer a clear understanding of the topic (Dawadi *et al*, 2021). As such, the qualitative phase used an interpretative design that focused on

understanding the underlying perspectives and experiences of participants, in this case the environmental issues in the bay. The quantitative phase employed a non-experimental correlational design to identify connections between variables without manipulating them.

3.1 Sample and Techniques

The population was national citizens non-residents of Chimbote, over 18 years of age that visited the area during March 2024. During the qualitative phase, 12 visitors to the bay (six women and six men) were selected by opportunity sampling to facilitate the rapid collection of data from individuals readily accessible (Hernández *et al*, 2014). In-depth interviews were conducted with these individuals that voluntarily agreed to participate in the study.

For the quantitative phase, a sample size of 385 visitors was determined with a margin error of 5% and a level of confidence of 95%. Convenience sampling was used due to specific characteristics identified by the researcher namely availability and willingness to respond (Hernández-Sampieri and Mendoza, 2018). This approach allowed the study to focus on individuals who were easily accessible and open to providing responses. A virtual survey was distributed via social media outlining the eligibility criteria and using filter questions to identify the target population.

3.2 Instruments

In the qualitative phase an inquiry guide was used to ensure key topics were covered while allowing researchers to explore responses in depth. The survey consisted of 21 open questions about environmental pollution, perceptions of visitors to the bay and the influence of environmental pollution on the tourist experience and intention to revisit.

Variables that emerged from the qualitative phase, such as the types of environmental pollution (air, water and soil) were included in the quantitative instrument so these perceptions could be measured. Similarly, variables defined by participants regarding the tourist experience and revisit intention were used to develop clear and precise items in the next part.

For the quantitative phase, a questionnaire that measured three variables through 23 items was used (Refer to figure 1 below) This instrument included Likert scale (ranging from 0 to 6) and socio-demographic questions as detailed below:

- Variable 1. Perception of Environmental pollution: 8 items
- Variable 2. Tourist Experience: 10 items
- Variable 3. Revisit Intention: 5 items

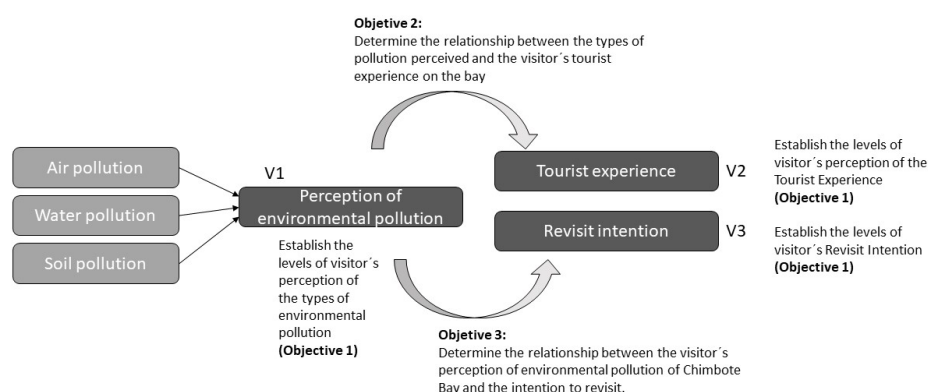


Figure 1: Variables and specific objectives of the study. Source: Own elaboration

3.3 Content Analysis

The content of the interviews was transcribed, and open code was used to identify categories through common themes. Axial coding was used to select relevant categories based on frequency and to group them into specific themes. Selective coding was also used to determine central themes related to the perception of environmental pollution and the tourist experience. Once no new themes or categories emerged, it was concluded that theoretical saturation had been reached (Hernández-Sampieri and Mendoza, 2018).

3.4 Data Analysis

SPSS was used to carry out the analysis of the three variables. The first objective was analyzed descriptively using frequencies and percentages; while to respond to objectives 2 and 3, non-parametric correlation tests were used. The Spearman coefficient was employed because normality tests have previously determined that some of the variables did not follow a normal distribution.

4. Results

4.1 Perceptions of Environmental Pollution

Participants' testimonies indicated that they perceived - three types of environmental pollution: air, water and soil through their senses. They also agreed on three main sources of environmental pollution from "fishing boats (E03)", "fishing factories (E08)" and "local residents: *Chimbotanos* (E09)". In the survey, the perception of environmental pollution was considered at very high level (96,92%) levels. Similarly, the types of pollution in the air, soil and water pollution were also identified the highest levels of perception with averages of 5,653, 5,672, 5,658 respectively. While differences in the perception means between the dimensions were noted, these were not significant.

4.2 Visitors' Perceptions of Environmental Pollution and the Tourist Experience

Using the five elements of the tourist experience, interviews revealed that regarding *reverie*, first-time visitors to the area had the illusion of finding a place where they could enjoy family outings and beautiful beaches, since "when you think of a bay, you expect blue sea, blue sky, sand (E10)". But once at the place, they had negative visual and olfactory effects due to pollution in the air, water and soil. This affected their perception of the *tourist landscape*, with some participants further pointing that the lack of fauna, such as birds and fish, was probably due to the high levels of pollution. While assessing their concerns during *reflection*, participants emphasised the need for stricter sanctions for polluters including those that throw garbage on the streets. They further noted the need for environmental education among local population to assist in improving conditions at the bay. In the *transformation element*, participants expressed concerns about the bay's environmental state with some feeling responsible for preventing littering and helping dispose of trash properly. For *recreation*, participants agreed that the environmental pollution limited tourist activities including "seeing fish (E01)", "swimming (E10, E12)", "photographing the landscape (E01)" and/or "walking or running (E05, E07)" or even enjoying the bay (E07 and E08).

Survey results showed that visitors had a very low-quality experience at 38.05%, and low quality at 61,18%. They also stated that while the destination evoked thoughts of beach days with the family (Mean=4,16), the current environmental conditions did not allow them to engage in planned tourist activities (Mean=1,21) and even they considered their health was affected (Mean=1,92).

The Spearman coefficient was used for the evaluation analysis between the perception of environmental pollution and the tourist experience, finding a significant inverse relationship (pvalue=0.000) but weak ($\rho=-0.231$) since it was less than 0.25 (Hernández-Sampieri and Mendoza, 2018).

Correlation tests were also carried out between the tourist experience and each of the dimensions of environmental pollution: air, soil and water; finding significant relationships in the three cases: tourist experience*air pollution (Pvalue=0.000), tourist experience*water pollution (Pvalue=0,000), tourist experience*soil pollution (Pvalue=0,000). However, the relationships were also weak (-0,284, -0,196, -0,199 respectively).

4.3 Visitors' Perceptions of Environmental Pollution and Intention to Revisit

The presence of garbage, bad odors and lack of cleanliness negatively impacted the overall visitor experience reducing the likelihood of returning. However, anticipation of future improvements and potential actions to mitigate pollution were factors that could influence their intention to return. In effect, the strongest reasons for

returning were improvements (4,54) and likeness to the bay (4,05). Additionally, personal and emotional connections to the place may further shape the decision to revisit as 73,43% of visitors had a medium or moderate intention to revisit, while 14,91% had low intention, and 0,77% very low intention. The evaluation test carried out between perceived environmental pollution and the intention to revisit resulted in a significant and moderate relationship ($P\text{value}=0.000$, $\rho=-0,365$).

5. Discussion

This study determined that the relationship between the perception of environmental pollution with the tourist experience and the revisit intention of visitors to Chimbote Bay were inverse. Visitors' perceptions of high pollution at the destination decreased their experience and intention to revisit. This finding coincided with Nabirye (2018) that identified the importance of aesthetic value in the creation of positive tourist experiences. Similarly, the study provided evidence to the dependence of coastal tourism on the environmental quality of the destination as noted by Aparicio-Serrano and Mate-Sanchez-Val (2022).

Visitors to the bay, without exception, were able to identify each type of environmental pollution (air, water and soil) which highlights the notoriety of the environmental problem in the area. As noted by Godovykh and Tasci (2020) humans perceive the environment through their senses, which in turn shapes their own perceptions. The fact that the three types of environmental pollution were perceived in practically the same magnitude showed that visitors to Chimbote Bay were also aware of the different sources of pollution namely fishing boats, fishing factories and even the local community. As previously mentioned, uncontrolled exploitation of fishery resources, industrial pollution, and urban sprawl contributed to the perception that Chimbote was solely a transit point (Loayza, 2022).

This study confirmed that environmental pollution affects the reputation of a tourist destination including the experience and satisfaction of tourists (Huiming *et al*, 2020). In addition, environmental issues also influenced the five elements of the tourism experience proposed by Klaus *et al* (2022).

Regarding reverie, when comparing perceptions of a coastal environment, visitors were faced with a place with high level of pollution. This caused disillusionment that adversely impacted the image of the place. Previous research showed the importance of how tourists process and evoke perceptions of a destination, as this directly influences their travel decision (Santos *et al*, 2020).

For the tourist landscape, the presence of pollutants and absence of fauna altered both the olfactory and visual perception diminishing the natural attractiveness of the place and experience of observing the ecosystem, essential for tourist enjoyment. As demonstrated by Godovykh and Tasci (2020) that indicated the natural landscape influences the tourist experience through the human senses.

Reflection was linked to the environmental situation of Chimbote Bay. Visitors reflected that the destination required intervention from the local government, companies and community to improve the conditions of the place. This showed that the absence of competent authorities and engaged stakeholders could lead to increased pollution in coastal destinations.

In the transformation element, this study revealed that visitors were willing to contribute to environmental protection. This demonstrated a genuine concern for the bay's condition and a proactive desire to preserve and improve the natural environment. It can thus be affirmed that the tourist experience was educational, sparking visitors' curiosity (Klaus *et al*, 2022) and encouraging to adopt a proactive stance toward environmental protection.

Regarding the recreational element, visitors perceived that the possibility of recreational activities was limited due to the presence of pollutants. This further contributed to an unwelcoming environment that generated negative emotions in visitors. This contrasts with Chien *et al* (2022) that stated that the natural environment is the source of recreation for tourists.

6. Conclusion

This study confirmed that visitors perceived high levels of all types of environmental pollution in Chimbote Bay, with clear evidence of deterioration caused by fishing activity. This resulted in noticeable pollution, as visitors could distinctively sense unpleasant odors and observe solid waste in the area. Furthermore, perceptions of air, water and soil pollution had an inverse relationship to tourists' engagement and participation in activities.

An inverse relationship also existed between the perception of environmental pollution in Chimbote Bay and the intention to revisit the destination. Visitors felt demotivated with the poor environmental quality of the area.

The study contributed to the literature on the relationship between the perception of environmental pollution and the tourist experience and the intention to revisit by examining factors within the specific geographic context of the Chimbote Bay, highlighting the issue of environmental pollution in the area. The inverse relationship between perceived environmental pollution with the tourist experience and revisit intention underscores the need for local government intervention to improve the bay's conditions to promote tourism. Active participation from other stakeholders including businesses and local community is essential to reduce environmental problems and enable tourism as contributor to the local economy.

While this study contributed to the literature and tourism sector by presenting the tourists' perspective on the impact of the environment, it also acknowledges some limitations related to the constrained timeframe for quantitative data collection. The research needed to be conducted in the field to accurately assess the tourism experience while it was occurring. However, due to time constraints, researchers were unable to travel to Chimbote for in-person data collection and had to rely on virtual methods instead. In addition, during the period of this research, Chimbote was not in high season, therefore, visitors that could have been encountered were scarce.

Recommendations for future research include quantitative research to evaluate the tourist experience of visitors during the city's peak tourism season, a comparative or longitudinal study, interviews with local authorities and surveys to the local population. In addition, participant observations at tourist sites could assist in capturing visitor behavior and interactions with local services offering a more comprehensive understanding of their experiences.

Acknowledgements

Dirección de Investigación de la Universidad Peruana de Ciencias Aplicadas E-035-2025

Disclosure Statement: The authors don't declare any possible conflict of interest.

References

- Amobonye, A., Ashokkumar, V., Awasthi, M., Bhattacharjee, G., Flora, G., Kumar, V., Pillai, S., Singh, V., Sirohi, R., Zhang, Z. and Zhou, Y. (2023) "Current research trends on cosmetic microplastic pollution and its impacts on the ecosystem: A review", *Environmental Pollution*, 328(1), pp. 1-20. DOI: <https://doi.org/10.1016/j.envpol.2023.121623>
- Aparicio-Serrano, G. and Mate-Sanchez-Val, M. (2022) "Seawater deterioration and the tourist beta convergence process: A geospatial big data analysis of the Spanish Mediterranean coast", *Current Issues in Tourism*, 25, pp. 2922-2938. DOI: <https://doi.org/10.1080/13683500.2021.2021156>
- Bogalecka, M. and Grobelna, A. (2023) "Air Pollution and Its Potential Consequences for Tourism and Career Development from Students' Perspective: A Case Study of the Gdańsk Agglomeration in Poland". *International Journal of Environmental Research and Public Health* i.,20(3):2651. DOI: <https://doi.org/10.3390/ijerph20032651>
- Cajusol, E. (2023) *Análisis de la factibilidad ecoturística del desembarcadero pesquero artesanal en la bahía de Chimbote*. Trabajo de investigación de Bachiller. Universidad Peruana de Ciencias Aplicadas. Repositorio Institucional de la UPC. Available from: <http://hdl.handle.net/10757/660852> [Accessed 04 October 2023].
- Castillo, J., Núñez, V. and Orgaz-Agüera, F. (2022) "Calidad de las aguas en ríos que desembocan en las playas turísticas. Estudio de caso en República Dominicana", *TURYDES: Revista sobre Turismo y Desarrollo Local Sostenible*, 15(32), pp. 1-17. DOI: <https://doi.org/10.51896/TURYDES>
- Chien, F., Hieu, M., Sadiq, M., Sharif, A. and Zhang, Y. (2022) "Does air pollution affect the tourism industry in the USA? Evidence from the quantile autoregressive distributed lagged approach", *Tourism Economics*, 29(5), pp. 1164-1180. DOI: <https://doi.org/10.1177/13548166221097021>
- Chih, S., Chung, H., Hsiao, L., Tzu, L., Ying, L. and Zhou, L. (2023) "In the context of the COVID-19 pandemic, can the development of coastal ecological resources create a safe leisure and tourism environment, maintain ecology, and promote economic development in villages?", *Marine and Freshwater Research*, 74(9), pp. 780-795. DOI: <https://doi.org/10.1071/MF22122>
- Cox, M., Johnstone, Ron W., and Robinson, J. J. (2003) *A conceptual model of impacts of environmental change on human well-being: Assessing the Social Economic impacts of change in coastal ecosystems*. Airs Waters Places Transdisciplinary Conference on Ecosystem Health in Australia, University of Newcastle, Australia, 14-16 April 2003. Australia: University of Newcastle.
- Dawadi, S., Shrestha, S. and Giri, R. (2021) "Mixed-Methods Research: A Discussion on its Types, Challenges, and Criticisms", *Journal of Studies in Education*, 2(2), pp. 25-36. DOI: <https://doi.org/10.46809/jpse.v2i2.20>

- Dirección Sub Regional de Comercio Exterior y Turismo-Chimbote (2023). Arribos Chimbote 2017-2022. [Accessed 25 October 2023]
- Dzitse, C., Doku, S. y Mwinuore, M. (2023) "Recreational experience among beach users in Ghana: Insights for beach management", *European Journal of Tourism, Hospitality and Recreation*, 13(2), pp. 236-251. DOI: <https://doi.org/10.2478/ejthr-2023-0019>
- Eusébio, C., Carneiro, M. J., Madaleno, M., Robaina, M., Rodrigues, V., Russo, M., ... and Monteiro, A. (2021) "The impact of air quality on tourism: a systematic literature review", *Journal of Tourism Futures*, 7(1), pp. 111-130. DOI: <http://dx.doi.org/10.1108/JTF-06-2019-0049>
- Godovych, M. and Tasci, A.D.A. (2020) "Customer experience in tourism: A review of definitions, components, and measurements", *Tourism Management Perspectives*, 35, pp. 1-10. DOI: <https://doi.org/10.1016/j.tmp.2020.100694>
- Grandez, P. (2017). El Ferrol, la Bahía que se resiste a morir. IPAMA. Available from: <http://ipama.org.pe/2017/10/30/ferrol-la-bahia-se-resistemorir/#:~:text=En%20la%20d%C3%A9cada%20de%20los,llegaban%20muchos%20extranjeros%20para%20vera%20near> [Accessed 08 September 2023].
- Hernández-Sampieri, R. and Mendoza, C. (2018) *Metodología de la investigación: Las rutas cuantitativa, cualitativa y mixta*. McGraw-Hill.
- Huang, K., Wei, C., Zhang, C. and Zhao, W. (2019) "Psychological factors affecting memorable tourism experiences", *Asia Pacific Journal of Tourism Research*, 24(7), pp. 619-632. DOI: <https://doi.org/10.1080/10941665.2019.1611611>
- Huiming, X., Manhong, S. and Mengmeng, Q. (2020) "Loss of tourism revenue induced by coastal environmental pollution: a length-of-stay perspective", *Journal of Sustainable Tourism*, 28, pp. 550-567. DOI: <https://doi.org/10.1080/09669582.2019.1684931>
- Kang, S., Ruan, W. and Song, H. (2020) "Applying protection motivation theory to understand international tourists' behavioural intentions under the threat of air pollution: A case of Beijing, China", *Current Issues in Tourism*, 23, pp. 2027-2041. DOI: <https://doi.org/10.1080/13683500.2020.1743242>
- Klaus, P., Kuppelwieser, V. and Manthiou, A. (2022) "Reevaluating Tourism Experience Measurements: An Alternative Bayesian Approach", *Current Issues in Tourism*, 26, pp. 2948-2964. DOI: <https://doi.org/10.1080/13683500.2022.2106193>
- Krelling, A.P.; Williams, A.T. and Turra, A. (2017) "Differences in perception and reaction of tourist groups to beach marine debris that can influence a loss of tourism revenue in coastal areas" *Marine Policy*, Volume 85, 2017, pp 87-99. DOI: <https://doi.org/10.1016/j.marpol.2017.08.021>
- Kusumawati, A., Suharyono, S., Sunarti, S. and Utomo, H. (2020) "Effects of sustainability on WoM intention and revisit intention, with environmental awareness as a moderator. *Management of Environmental Quality*, 31(1), 273-288. DOI: <https://doi.org/10.1108/MEQ-03-2019-0064>
- Landowski, M., Lapko, A., Panasiuk, A. and Strulak-Wójcikiewicz, R. (2020) "The State of Air Pollution as a Factor Determining the Assessment of a City's Tourist Attractiveness—Based on the Opinions of Polish Respondents", *Sustainability*, 12(4), pp. 1-21. DOI: <https://doi.org/10.3390/su12041466>
- Lee, L.H. and Lee, Y.D. (2015). "The impact of water quality on the visual and olfactory satisfaction of tourists", *Ocean & Coastal Management*, 105, pp 92-99. DOI: <https://doi.org/10.1016/j.ocecoaman.2014.12.020>
- Loayza, R. (2022) "Avances en la recuperación ambiental de la bahía El Ferrol (Chimbote, Perú): evaluación rápida", *Revista del Museo de Historia Natural. Arnaldoa*, 29 (2), pp. 319-332. DOI: <http://doi.org/10.22497/arnaldoa.292.29108>
- Loayza, R. (1998) *Génesis de la Perturbación de la Bahía "El Ferrol"*. Instituto Ecologista Natura; Universidad Nacional del Santa. 104 p.
- Maunier, C., & Camelis, C. (2013) "Toward an identification of elements contributing to satisfaction with the tourism experience", *Journal of Vacation Marketing*, 19(1), pp. 19-39. <https://doi.org/10.1177/1356766712468733>
- Nabirye, R. (2018) *The effect of beach pollution on tourist satisfaction*. Tesis de maestría. Universidad de las Islas Baleares]. Repositorio Institucional UIB. Available from: https://dspace.uib.es/xmlui/bitstream/handle/11201/149333/tfm_2017-18_METM_rna781_1686.pdf?sequence=1&isAllowed=y [Accessed 16 August 2023].
- Santos, L., Cardoso, L., Araújo, N. and Fraiz, A. (2020) "Sustainability Perceptions in Tourism and Hospitality: A Mixed-Method", *Sustainability*, 1, pp. 1-19. DOI: <https://doi.org/10.3390/su12218852>
- Truong, D., Xiaoming Liu, R. and Yu, J. (2020) "Mixed methods research in tourism and hospitality journals", *International Journal of Contemporary Hospitality Management*, 32(4), pp. 1563-1579. DOI: <https://doi.org/10.1108/IJCHM-03-2019-0286>
- United States Environmental Protection Agency. (n.d). Vocabulary Catalog. Available from: https://sor.epa.gov/sor_internet/registry/termreg/searchandretrieve/glossariesandkeywordlists/search.do [Accessed 07 September 2023].

Driving Transformation: Increasing Customers' Willingness to Pay in Transformative Travel Services

Henri Karppinen¹ and Katja Pasanen²

¹Faculty of Business and Hospitality Management, LAB University of Applied Sciences, Lappeenranta, Finland

²Business School, Faculty of Social Sciences and Business Studies, University of Eastern Finland, Joensuu, Finland

henri.karppinen@lab.fi

katja.pasanen@uef.fi

Abstract: Why does pricing fail to meet consumer expectations? According to Zeithaml et al. (2020), more attention is needed in service research to understand how customer value is associated with products and services, and how value is assessed. One area of interest is transformative services, where interactions between service providers and consumers influence the well-being of both (Anderson et al., 2013). Within this field, transformative value represents the social dimension of value creation that promotes well-being, as defined by Blocker and Barrios (2015). This study focuses on transformative services and value creation from two perspectives: the consumer's willingness to pay and value creation mechanisms. Brandenburger and Stuart (1996) define total value created (TVC) as the difference between the consumer's willingness to pay (WTP) and service input costs (C). Biloshapka and Osiyevskyy (2018) refine this by adding price (P) and dividing TVC into the consumer's value capture (WTP - P) and business value capture (P - C). The consumer's value capture is supported by value creation mechanisms—including value proposition, targeting, delivery, and appropriation (Biloshapka and Osiyevskyy, 2018). The study adopts a qualitative and exploratory approach, utilizing panel survey data (n = 1040) to identify potential implications for value creation mechanisms in transformative travel services. Survey participants were asked to assess their interest in and willingness to pay for 29 tourism services and products. The focus of the analysis was on identifying value creation mechanisms and exploring their adaptation options within each group. The findings indicate that value creation mechanisms in relation to willingness to pay are crucial in transformative services. The study concludes that: (1) transformative services benefit from new types of value creation mechanisms, and (2) the willingness-to-pay approach might overlook the transformative nature of the service. Further research is proposed to explore the implications of extended value creation mechanisms for service design.

Keywords: Transformative travel service, Value creation mechanisms, Willingness to pay

1. Introduction

It is not uncommon to operate a service without any formal design or understanding of value creation aspects. While science has advanced and contributed to service business in practice, major gaps still exist between business and conceptual scientific understandings of services. Brandenburger and Stuart (1996) raised a fundamental question that remains crucial today: What exactly constitutes “value” in a business context? Consumer behavior and expectations have also diversified over the years. Pine and Gilmore (2013) described this transition as a movement from extracting commodities to staging experiences.

One field of staging experiences is the so-called transformative services. Transformative services differ from traditional output-driven services in that they aim to support consumer well-being and broader social impacts (Blocker and Barrios, 2015). The transformative nature of these services expands or challenges traditional views: in transformative contexts, the consumer's role in creating value is typically more pronounced than the provider's. While Anderson and Ostrom (2015) identified transformative value as a property of the provider's resource, it could be argued that in most cases, the business party still aims to capture the traditional business value.

This study focuses on transformative travel services as a specific form of transformative services. The main objective of this study is to analyze consumers' willingness to pay (WTP) in six transformative services and to compare these findings with actual prices. Using a qualitative approach, the study explores how WTP insights can enhance the understanding of value creation mechanisms in transformative contexts. The primary research question is: How should value creation mechanisms be adapted to meet the requirements of transformative (travel) services?

The paper is structured as follows: the introduction is followed by a theoretical background that presents contradictions in existing research. These misalignments inform a conceptual framework aimed at analyzing the qualitative aspects of WTP data. The research design section explains the conceptual process, and the

findings focus on direct observations from the data. The discussion section explores and proposes potential explanations, before concluding the study and suggesting directions for future research.

2. Theoretical Background

Vargo et al. (2008) distinguish between value-in-exchange and value-in-use as two contrasting approaches to understanding value creation in services. Value-in-exchange refers to the traditional, goods-oriented view. Value is predetermined by the provider and transferred to the consumer through economic transactions, often measured by the price the consumer is willing to pay. Whereas value-in-use means that value emerges only through the consumer's active engagement with the service in their specific context. According to Vargo et al. (2008), this perspective sees value as co-created by both provider and consumer, developing dynamically as the service integrates into the consumer's life. Value-in-use emphasizes interaction and experiential engagement, where the consumer's application of resources, such as knowledge or skills, shapes the realized value.

Edvardsson, Tronvoll, and Gruber (2011) expand the understanding of value creation by introducing value-in-social-context. This perspective emphasizes that value is not only co-created in direct service interactions but is also fundamentally shaped by the broader social context. Edvardsson, Tronvoll, and Gruber (2011) argue that value arises through interactions embedded within social systems, where roles, relationships, and societal norms influence how value is perceived and realized. This approach underscores the importance of considering social influences and shared meaning in value creation, expanding the scope of service-dominant logic to include the collective, socially constructed aspects of value.

2.1 Transformative Services and Value Creation

Transformative services focus on "creating uplifting changes and improvements in the well-being of individuals, families, social networks, communities, cities, nations, collectives, and ecosystems" (Anderson and Ostrom, 2015, 243). Blocker and Barrios (2015) define transformative value as a socially oriented dimension of service value that generates significant, uplifting changes for individuals and collectives, often with implications beyond personal well-being. Anderson and Ostrom (2015) identify core themes in transformative services such as service access, employee well-being, and service co-creation while calling for more research on unintended value destruction and the role of social and collective influences in service settings. Rosenbaum et al. (2011) contribute discussion by highlighting the transformative potential of both inherently transformative services, such as healthcare, and everyday services.

Transformative travel services form a special area in the field of transformative services. Zhao and Agyeiwaah (2023) define transformative travel services as tourism experiences that facilitate profound personal change by immersing tourists in reflective, challenging, and novel environments. Such experiences encourage a re-evaluation of pre-existing values, beliefs, or behaviors, fostering shifts in perspective that endure beyond the travel context. These transformations may occur across multiple dimensions—behavioral, psychological, social, and spiritual—resulting in sustained impacts that can alter tourists' subsequent life choices, interpersonal relationships, and self-concept.

Blocker and Barrios (2015) also highlight the experience-related aspect of transformative value which targets the individual consumer's subjective engagement with the service. Here, value is derived from deeply meaningful interactions that facilitate personal growth, agency, and emotional transformation, creating what Blocker and Barrios (2015) describe as "anti-structural" spaces that empower individuals, particularly those from vulnerable backgrounds. This perspective aligns with Zeithaml et al.'s (2020) interpretive paradigm, which views value as subjective and context-specific, although transformative value intensifies this by directly supporting individual empowerment.

2.2 Business Model View on Transformative Value Creation

Biloshapka and Osiyevskyy (2018) present a structured framework for value creation within business models, identifying four core mechanisms: value proposition, value targeting, value delivery, and value appropriation. The model emphasizes internal coherence, focusing on how businesses systematically create and capture value by clearly defining value propositions, targeting appropriate customer segments, ensuring effective delivery, and capturing returns. Costa Climent and Haftor (2020) propose a more adaptive framework by promoting business models that adapt flexibly to changing external conditions. This perspective contrasts with the structured approach of Biloshapka and Osiyevskyy (2018) by underscoring that sustained value creation

often requires flexibility and responsiveness to the business environment, especially under conditions of rapid change.

Further extending this adaptive view, Sjödin et al. (2020) emphasize the importance of co-alignment between value creation and capture in outcome-based services. In their framework, alignment is continuously refined throughout the service relationship, allowing providers and customers to collaboratively adapt value mechanisms in response to evolving needs and relational dynamics. This process-oriented approach aligns with Costa Climent and Haftor (2020) who emphasis on adaptability but adds a relational dimension where value creation is dynamically co-managed to ensure sustained value realization.

3. Conceptual Framework

The base for the conceptual framework in this study is the following argument: If flexibility components are added to the business model, how could the applicability of the value mechanism model within transformative services be improved? Flexibility would enable the model to better capture the context-sensitive and socially embedded nature of value creation (Edvardsson, Tronvoll, and Gruber, 2011) as well as the transformative value (Blocker and Barrios, 2015), where value arises through individual empowerment and collective impact. Integrating adaptive elements, as advocated by Costa Climent and Haftor (2020) and Sjödin et al. (2020), would enable the model to respond to evolving service environments, aligning with both immediate and long-term shifts in needs.

In a transformative service context, value cannot be fully captured by consumer's willingness to pay adjustments alone, as it encompasses elements such as consumer participation, the quality of interactions, and the ability to respond to consumer feedback. The consumers' willingness to pay cannot be either overseen. Traditional WTP models in the service context consider the value proposition primarily through the principle of value as exchange, where the consumer's willingness to pay (WTP) directly aligns with a clearly defined offering (Biloshapka and Osiyevskyy, 2018). The price paid by the consumer reflects the immediate utility of a service and the value proposition is fixed.

Traditionally, the processes of value creation (consumer) and value capture (business) are assumed to be outcomes of the value delivery process. Delivery here is understood as the operationalization of the value proposition rather than as an interactive process. While the framework by Biloshapka and Osiyevskyy (2018) categorizes value creation and capturing mechanisms through price- and cost-related dynamics, it presents a limitation by focusing predominantly on value as exchange. This emphasis on mechanisms such as value proposition, targeting, delivery, and appropriation—geared towards optimizing willingness to pay (WTP) and controlling costs—does not fully account for the co-creative processes central to experiential value.

3.1 Flexibility in Value Propositions and Value Delivery

Biloshapka and Osiyevskyy (2018) define the value proposition as “the promised set of benefits the firm offers to its consumers” or “a multidimensional commitment that includes different levels of promised benefits across dimensions such as speed, reliability, accessibility, capacity, or status.” Kowalkowski (2011) argues that the value creation implied in the value proposition is rarely delivered directly. Instead, it emerges through interactions and resource sharing between the service provider and the customer. In the transformative service context, the value proposition functions as a “frame for action,” indicating an inherent flexibility in both value proposition and delivery.

Biloshapka and Osiyevskyy (2018) consider value delivery as the mechanism by which a business model fulfills the promises embedded in the value proposition. Their business model framework includes (a) the revenue model, (b) the go-to-market model, (c) the production model, and (d) the product development model. In relation to experiential services, Bueno et al. (2019) found a conceptual distinction between customer experience and service experience: the former refers to the subjective, internal responses customers have during interactions with a company, spanning pre-purchase, purchase, and post-purchase stages. The latter, service experience, encompasses the perspectives of all stakeholders within the service ecosystem, including providers and other actors, making it broader and more holistic.

Based on the literature, it is proposed that the value proposition and value delivery must be adaptable, addressing both the transactional aspect of purchasing and the experiential component that evolves throughout the service journey. In practice, this flexibility in the value proposition might manifest as options or potential outcomes tailored to consumer needs. Similarly, flexibility in service delivery is essential in

transformative contexts, as adjustable components are necessary to ensure that the consumer can perceive and experience the intended transformation fully.

3.2 Adapting Value Creation Mechanisms to Transformative Service Context

Biloshapka and Osiyevskyy (2018) categorize service business models into four categories based on the relationship between consumer value and business value: i) **Winner**: Represents the ideal business model, achieving both high consumer value and high business value, ii) **Giver**: High consumer value is created but fails in capturing sufficient business value, often leading to unsustainable operations, iii) **Taker**: High business value capture but low consumer value, this model can arise in monopolistic or coercive contexts, where consumers pay more than their perceived value received and iv) **Loser**: Reflects a failed business model where both consumer and business values are negative.

The conceptual framework is presented in Table 1, where flexibility propositions in each category are presented. Flexibility is added to both value proposition and value delivery. Willingness to pay (WTP) - Price (P) represents the consumer value and Price (P) - Cost (C) the business value.

Table 1: Consumer and business value mechanisms across transformative service model configurations

	Fixed value proposition	Flexible value proposition
Preset value delivery	Standardized service: WTP-P: Stable customer value due to standardization, but limited personalization may reduce willingness to pay. P-C: High business value through predictable processes and economies of scale.	Modular service: WTP-P: Higher customer value with customizable add-ons, potentially increasing willingness to pay. P-C: Slightly lower business value due to added modular costs, managed by limiting choices.
Flexible value delivery	Reactive service: WTP-P: Increased customer value through responsive delivery that addresses individual needs, enhancing willingness to pay. P-C: Reduced business value due to high delivery costs; efficient cost control is necessary.	Adaptive service: WTP-P: Highest customer value as offerings adapt to individual preferences, maximizing satisfaction and willingness to pay. P-C: Volatile business value due to high flexibility costs and unpredictability; premium pricing may be needed to maintain profitability.

4. Research Design

The research design of this study is based on process of exploration and discovery in the context of transformative travel services. Stebbins (2001) defines social science exploration as a comprehensive, intentional, and systematic process aimed at uncovering generalizations that help describe and understand social or psychological phenomena, highlighting the role of discovery. In the field of conceptual studies, Creswell's (2009) principles of research design and Yin's (2003) criteria (construct validity, internal validity, external validity, and reliability) provide a solid basis for rigorous study. Construct validity ensures clear, well-defined concepts aligned with research objectives; internal validity maintains logical coherence within the theoretical framework; external validity considers the framework's applicability across contexts; and reliability emphasizes a systematic, transparent approach to pre-theory building, allowing for replication or adaptation in similar studies. This approach prioritizes discovery over the confirmation of existing assumptions.

The main research question of the study is: *How should value creation mechanisms be adapted to meet the requirements of transformative (travel) services?*

4.1 Methodology

The thematic framework analysis in this study is a modification of a structured process, as outlined by Gale et. al. (2013) and Ritchie et. al. (2003), to ensure clarity and consistency in qualitative data handling. First, familiarization with the data allows for initial insights, leading to the development of a thematic conceptual framework. Second, indexing and charting categorize data systematically, ensuring all relevant information is captured within thematic codes. Finally, mapping and interpretation analyze relationships across themes, drawing meaningful insights on consumer perceptions of value and willingness to pay. This approach provides

a transparent, rigorous methodology suitable for transforming quantitative data into context-rich, qualitative insights.

The data in this study, while containing quantitative elements (willingness to pay and actual service price in euros), is fundamentally qualitative in nature. Service descriptions provide contextual depth to these price values, revealing qualitative characteristics that quantitative data alone cannot capture. Additionally, consumer willingness to pay, though expressed numerically, reflects subjective value judgments, influenced by personal perceptions and experiences. The true price alone lacks interpretive meaning without understanding consumers' reasoning and value assessment.

4.2 Data

The study data was collected through an online survey distributed via a consumer panel. The survey targeted Finnish and German consumers over 18 years of age who were interested in tourism in Finland. In each country, the survey was conducted in the respondents' native language. A total of 538 responses were received from Finland and 502 from Germany. The survey focused on interest in transformative travel and different transformative travel products. Respondents were presented with a total of 29 products enabling transformative travel experiences, which are offered by Finnish tourism companies.

Previous studies (e.g., Pung, Gnoth, and Del Chiappa, 2020; Zhao and Agyeiwaah, 2023) have identified elements and types of trips with a greater potential to generate transformative experiences. Respondents rated each service on a seven-point Likert scale based on their level of interest. Additionally, respondents were asked about their willingness to pay for six different transformative travel products, selected from the 29-item list. These six products represented various types of transformative travel offerings. For each product, the actual price was provided, and respondents were asked to adjust a slider to indicate what they would be willing to pay.

4.3 Analysis – Indexing, Charting and Thematic Coding

The analysis in this study focuses on the willingness to pay (WTP) for transformative travel services across two distinct customer groups: group A (Finland) and group B (Germany). Six services were included in the study: 1) a guided rooftop walk in the city, 2) a cooking course featuring local cuisine, 3) a forest bathing session, 4) a husky safari in Lapland, 5) a shepherd holiday and 6) a personal development retreat.

Respondent data was collected separately for each service with substantial sample sizes from both groups. For each service, the number of respondents was recorded to enable comparative analysis. Group A responses ranged from 248 to 373 per service, while group B responses ranged from 277 to 431 per service. The thematic coding included organizing data based on willingness to pay/service (perceived value proposition), price/service (consumer price set by the provider), median willingness to pay (middle value) and share of price-premium consumers/service (respondents with WTP>P). Thematic coding provided a basis for identifying flexibility potential in value propositions and value delivery mechanisms.

5. Findings

The data revealed multiple aspects of willingness to pay in relation to actual prices. Group A generally valued products below their actual prices, with the largest gaps for experiences like the "Husky safari" and "Forest bathing" valued 50% and 29% below actual prices, respectively. Group B, in contrast, showed a higher willingness to pay than Finnish respondents, with some products, such as the "Guided roof walk," showing a willingness to pay up to 137% above the actual price. For both groups, products like the "Husky safari" and "Shepherd holidays" showed significant differences between actual prices and willingness to pay, with consistently smaller gaps among German respondents.

Willingness to pay a premium varied also: Only a small portion of Group A respondents were willing to pay a premium, ranging from 4% to 12% of all Group A respondents, with average premium willingness notably lower than that of Germans. Group B displayed a higher premium-paying willingness (19% to 38% of all Group B respondents) across products, particularly for experiences like the "Guided roof walk" and "Cooking course," where premiums were higher. "Shepherd holidays" and "Self-development retreat" held the highest premium values among both groups, with greater acceptance among Germans.

Median WTP differences provided interesting views: Group B consistently showed a higher median WTP relative to the price, particularly in services 1, 2, and 3. For example, in service 1, Group B's median WTP was +137% above the price, compared to -8% for Group A. Similar patterns were noted for other services. For each

service, Group B had a significantly higher proportion of respondents willing to pay above the listed price. For instance, in service 1, 38% of Group B respondents were willing to pay more than the price, compared to 12% of Group A.

The analysis provided some evidence, that response (WTP) to value propositions can be very different within the same service. Four distinct consumer segments were identified:

1. $P > WTP$: Where consumers' willingness to pay is below the service price.
2. $P < WTP$: Where consumers' willingness to pay exceeds the service price.
3. $P = WTP$: Where consumers' willingness to pay closely aligns with the service price ($\pm 10\%$).
4. $P > WTP$ and $P < WTP$: Where consumers within the same group show both willingness to pay above and below the service price.

It should be emphasized that these groups represent reactions to value propositions presented in a standard format, without flexibility applied.

6. Discussion

The findings suggest that instead of merely increasing flexibility within a single value proposition, distinct propositions tailored to each consumer group may more effectively support unique perceptions of value and flexibility in the delivery phase. The theme of perceived value propositions has received limited attention in existing service literature. This study tentatively suggests that how consumers perceive value propositions shapes their value expectations (WTP-P). That is fundamentally a different view than the actual consumer value, after the service consumption. If a provider sees an opportunity to raise prices, this could strongly influence consumers' perception of the value creation opportunity.

As Biloshapka and Osiyevskyy (2018) argue, effective value targeting allows a provider to offer specific value propositions to consumer groups who will appreciate them most. Based on this study, perceived value propositions and perceived value delivery together define consumer value. In transformative and transformative travel services, however, value targeting often relies on assumptions about perceived value delivery, usually limited to the phase when the provider interacts with the consumer. Consumers often base purchasing decisions on the value proposition and the expectations it sets for value creation (i.e., is it worth it?).

If the transformative nature of the service is sustained, the benefits—or value created—may emerge long after the interactive phase has concluded. Does the provider consider the consumer value creation that takes place after or even before the interactive phase of value creation? Could the provider efficiently support consumers' value creation before and after the interactive phase? How cost-efficient is it to adapt to and commit to individual value creation efforts? Based on existing literature, it seems that a business-oriented view considers value creation as a mechanistic process, while transformative approaches highlight non-direct and dynamic value creation 'spaces.'

A basic assumption of feasible business is that the company is able to capture value. Biloshapka and Osiyevskyy (2018) define it as the difference between the consumer price and the cost of inputs. Their view is typical in considering the firm's bargaining power and competitive advantages in the market. It also follows the logic in which value or service delivery is considered to be a one-time event. As pointed out earlier, value appropriation seems closely linked to how consumers perceive the value proposition. The more flexibility there is built into the value proposition, the more flexibility there is in value delivery. For example, the value proposition related to a roof walk experience could vary greatly between a summer evening and a winter evening. Depending on the value proposition and value targeting, consumer value and business value can be significantly different, even though the service delivery cost is approximately the same.

6.1 Proposed Additional Value Mechanisms

Based on literature and findings on flexibility in value delivery, value alignment is proposed as new value creation mechanism that encompasses both the consumer's perception of interaction and the firm's interaction inputs, contributing directly to the overall service experience. On the consumer side, value alignment enhances perceived value by actively involving the customer in the service process, fostering a sense of engagement and personalization that increases willingness to pay (WTP). On the business side, interaction inputs support real-time responsiveness, allowing the firm to adjust the service to meet emerging or evolving consumer needs. Relational appropriation is a proposed value capture mechanism that positions each instance of value delivery as an integral part of the future value proposition, fostering a cumulative

consumer relationship over time. Relational appropriation captures value by reinforcing consumer trust, satisfaction, and loyalty with each service experience.

6.2 Reliability and Limitations

The reliability of this explorative study highlights several open questions that must be addressed. The main limitations include reliance on self-reported willingness-to-pay (WTP), which may introduce hypothetical bias, as responses could differ from actual purchase behavior. The data does however provide enough input to identify potential categories. Additionally, the study's focus on Finnish and German consumers limits generalizability across diverse cultural contexts. Finally, categorical WTP classifications (e.g., $P < WTP$, $P = WTP$, $P > WTP$) may oversimplify consumer perceptions, potentially overlooking value dynamics. Future research with a mixed-methods approach and broader samples could enhance both the external validity and depth of findings.

6.3 Conclusions and Future Research

This study contributes to transformative service research by exploring distinct patterns in consumer willingness to pay (WTP) that challenge traditional, uniform value propositions and value creation mechanisms. By identifying consumer segments with varying WTP relative to actual prices, the study challenges knowledge on how differentiated service models may enhance the consumer experience and perceived value in transformative travel services. The segmentation framework ($P > WTP$, $P < WTP$, $P = WTP$, and mixed cases) provides a structured basis for analyzing value proposition perceptions, offering transformative service providers practical insights for adapting pricing and service models to meet diverse consumer needs.

The categorization of consumer groups based on willingness to pay (WTP) advances understanding of diverse value perceptions, addressing calls by Payne, Frow, and Eggert (2017) to explore differentiated CVP (customer value propositions) design for varied consumer needs. This segmentation provides insight into the need for adaptable service models, aligning with transformative service research's emphasis on designing services that effectively meet the needs of diverse consumer segments (Anderson et al., 2013). The main contribution to future research is to clarify the concept of transformative service to reveal the full variety, proposing that it can serve as a foundation for a business model. This perspective extends beyond transformative services traditionally focused on consumer well-being and personal transformation, with expected implications for the field of service design and especially transformative travel services.

References

- Anderson, L., Ostrom, A.L. (2015) "Transformative service research: Advancing our knowledge about service and well-being", *Journal of Service Research*, Vol 18, No. 3, pp. 243-249.
- Anderson, L., Ostrom, A.L., Corus, C., Fisk, R.P., Gallan, A.S., Giraldo, M., Mende, M., Mulder, M., Rayburn, S.W., Rosenbaum, M.S., Shirahada, K., and Williams, J.D. (2013) "Transformative service research: An agenda for the future", *Journal of Business Research*, Vol 66, No. 8, pp. 1203-1210.
- Biloshapka, V. and Osiyevskyy, O. (2018) "Value creation mechanisms of business models: Proposition, targeting, appropriation, and delivery", *The International Journal of Entrepreneurship and Innovation*, Vol 19, No. 3, pp. 166-176.
- Blocker, C.P. and Barrios, A. (2015) "The transformative value of a service experience", *Journal of Service Research*, Vol 18, No. 3, pp. 265-283.
- Brandenburger, A.M. and Stuart, H.W. (1996) "Value-based business strategy", *Journal of Economics & Management Strategy*, Vol 5, No. 1, pp. 5-24.
- Bueno, E.V., Weber, T.B.B., Bomfim, E.L., and Kato, H.T. (2019) "Measuring customer experience in service: A systematic review", *The Service Industries Journal*, Vol 39, No. 11-12, pp. 779-798.
- Costa Climent, R. and Haftor, D.M. (2021) "Value creation through the evolution of business model themes", *Journal of Business Research*, Vol 122, pp. 353-361.
- Creswell, J.W. (2009) *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches*, 3rd ed., Sage Publications, Thousand Oaks, CA.
- Edvardsson, B., Tronvoll, B., and Gruber, T. (2011) "Expanding understanding of service exchange and value co-creation: A social construction approach", *Journal of the Academy of Marketing Science*, Vol 39, No. 2, pp. 327-339.
- Gale, N.K., Heath, G., Cameron, E., Rashid, S., and Redwood, S. (2013) "Using the framework method for the analysis of qualitative data in multi-disciplinary health research", *BMC Medical Research Methodology*, Vol 13, Article 117, pp. 1-8.
- Kowalkowski, C. (2011) "Dynamics of value propositions: Insights from service-dominant logic", *European Journal of Marketing*, Vol 45, No. 1/2, pp. 277-294.

- Payne, A., Frow, P., and Eggert, A. (2017) "The customer value proposition: Evolution, development, and application in marketing", *Journal of the Academy of Marketing Science*, Vol 45, No. 4, pp. 467-489.
- Pine, B.J. and Gilmore, J.H. (2013) "The experience economy: Past, present and future", In: Sundbo, J. and Sørensen, F., eds., *Handbook on the Experience Economy*, Edward Elgar Publishing, Cheltenham, pp. 21-40.
- Pung, J.M., Gnoth, J., and Del Chiappa, G. (2020) "Tourist transformation: Towards a conceptual model", *Annals of Tourism Research*, Vol 81, No. 2, 102885.
- Ritchie, J., Spencer, L., and O'Connor, W. (2003) "Carrying out qualitative analysis", In: Ritchie, J. and Lewis, J., eds., *Qualitative Research Practice: A Guide for Social Science Students and Researchers*, Sage Publications, London, pp. 219-262.
- Rosenbaum, M.S., Corus, C., Ostrom, A.L., Anderson, L., Fisk, R.P., Gallan, A.S., Giraldo, M., Mende, M., Mulder, M., Rayburn, S.W., Shirahada, K., and Williams, J.D. (2011) "Conceptualisation and aspirations of transformative service research", *Journal of Research for Consumers*, Vol 19, pp. 1-6.
- Sjödin, D., Parida, V., Jovanovic, M., and Visnjic, I. (2020) "Value creation and value capture alignment in business model innovation: A process view on outcome-based business models", *Journal of Product Innovation Management*, Vol 37, No. 2, pp. 158-183.
- Stebbins, R.A. (2001) *Exploratory Research in Social Sciences*, Sage University Paper Series on Qualitative Research Methods, Vol 48, Sage Publications, Thousand Oaks, CA.
- Vargo, S.L., Maglio, P.P., and Akaka, M.A. (2008) "On value and value co-creation: A service systems and service logic perspective", *European Management Journal*, Vol 26, No. 3, pp. 145-152.
- Yin, R.K. (2003) *Case Study Research: Design and Methods*, 3rd ed., Sage Publications, Thousand Oaks, CA.
- Zeithaml, V.A., Verleye, K., Hatak, I., Koller, M., and Zauner, A. (2020) "Three decades of customer value research: Paradigmatic roots and future research avenues", *Journal of Service Research*, Vol 23, No. 4, pp. 409-432.
- Zhao, Y. and Agyeiwaah, E. (2023) "Understanding tourists' transformative experience: A systematic literature review", *Journal of Hospitality and Tourism Management*, Vol 54, pp. 188-199.

The Role of Film Festivals in Promoting Cultural Identity of Tourism Destinations

Alexandra Lavaredas, Dora Gomes and Francisco Dias

Citur, Institut Polytechnique of Leiria, Portugal

alexandra.lavaredas@ipleiria.pt

Dora.gomes@ipleiria.pt

Francisco.dias@ipleiria.pt

Abstract: Film festivals have become increasingly important in the tourism industry, providing a unique opportunity to highlight the diverse cultural heritage of the regions where they are hosted. This study aims to explore the role of film festivals in promoting and shaping the cultural identity of tourism destinations, focusing on how they contribute to the crafting and dissemination of a destination's cultural identity. This research employs a qualitative approach, using content analysis of videos from the 17th edition of the ART&TUR Festival (2024) to evaluate how dimensions of cultural identity are reflected in tourism promotional videos. The findings from this study reveal that tourism promotion videos are strategically incorporating a variety of cultural elements to craft the identity of each destination. Film festivals, particularly those focused on tourism promotion, act as important platforms for both showcasing and preserving cultural identity. Tourism promotional videos, as key tools in cultural diplomacy, allow destinations to showcase their heritage, but they also risk reinforcing stereotypes or oversimplifying complex identities. For local communities, the study emphasizes the importance of being actively involved in the creation of tourism promotional materials, promoting cultural preservation while still embracing the economic opportunities tourism brings. The paper concludes by summarizing the key insights and offering recommendations for future research and practice in this area.

Keywords: Film festivals, Promotional videos, Tourism destination, Cultural identity, Tourism films

1. Introduction

Film festivals have evolved into influential platforms for the expression and promotion of cultural identities, offering a unique opportunity to highlight the diverse cultural heritage of the regions where they are hosted. These events go beyond the realm of cinema, serving as key instruments for positioning a destination as culturally vibrant and distinct. By showcasing local customs, traditions, and values through storytelling, films not only enhance the image of the destination but also help construct a compelling narrative around its cultural identity (Davis, 2023). As an increasingly important tool in tourism marketing, film festivals allow regions to engage a global audience, facilitating a deeper understanding and appreciation of local culture. Given their growing significance in the tourism industry, this study aims to explore the role of film festivals in promoting and shaping the cultural identity of tourism destinations, focusing on how they contribute to the crafting and dissemination of a destination's cultural identity and image.

This paper is organized into six sections. Following the introduction, the literature review provides an overview of existing research and identifies key gaps, setting the foundation for this study. The methodology section outlines the research design and approach used in the analysis. The results and discussion sections present the findings from the study, providing insights into the role of film festivals in cultural identity promotion. Finally, the paper concludes by summarizing the key insights and offering recommendations for future research and practice in this area.

2. Literature Review

2.1 Cultural Identity

Since identity is a dynamic, flexible, and constantly evolving process, compounded by the fragmentation of traditional reference frameworks that once anchored individuals and their interactions with the social world, identity becomes a "mobile celebration: continually formed and transformed in relation to the ways in which we are represented or interpellated in the cultural systems that surround us" (Hall, 2006:2).

We are represented according to our location within global economic, political, ideological and other power relations, as Brah (2006) suggests. This multiplicity of identities to which individuals belong led Smith (1991) to introduce the concept of identity collectives, highlighting gender, class, territory, ethnicity and religion as categories in which different identities find a substrate or common ground to which people feel a need to belong. Becoming part of a nation means getting represented by symbols and traditions that seek to recall established values, a collective heritage and cultural connection, thereby strengthening the sense of common identity. It is

from this context that the concept of national identity emerges, which, through the prism of a collective personality and a unique culture, gives its members a sense of definition and place in the world (Smith, 1991).

According to Smith (1991), the symbols and traditions provided by the various systems in which citizens are embedded serve to remind of the established values of a given collective entity. For the author, this is how the different members remember their common heritage and cultural connection. This cultural connection can be described as dynamic group identifications that emerge as shared locations of speaking, acting, and producing and is constructed in social interaction (Collier, 2005). Therefore, cultural identity involves the expression and negotiation of social affiliations by group members within specific contexts (Collier, 2005), shaped by contextual structures and public discourses that create representations and individual judgements (Collier, 2005, 2009).

Cultural identity refers to the emotional and physical connection an individual has to a specific culture, which shapes their choices, behaviors, religion, skills, language, and preferences in ways that align with those of others in the same cultural group. This shared identity allows members of the group to recognize each other as part of the same community. Cultural identities are evident in daily life. Members of a culturally distinct group employ similar skills, art forms, symbols, languages, and share common perspectives, ideas, and interpretations which collectively distinguish members of the same culture (Yeo & Cao, 2021). Within this scope, the Cultural Identity Theory examines how individuals express their cultural identities across diverse social contexts and how these identities—both personal and collective—are negotiated, sustained, and occasionally challenged through communication. It suggests that identities are not static attributes but are instead constructed, maintained, and conveyed through social interactions, shaped by cultural norms and power relations. This perspective emphasizes identity as an evolving, communicative process, highlighting its fluidity and sensitivity to contextual influences (Collier, 2005).

2.2 Branding the Identity of a Tourism Destination

Identity of a place becomes even more relevant when we come across the touristic needs of a destination. The increasing search for tourism products and services has led to a pressing need for tourism destinations to differentiate themselves and let tourists know of their existence (Qu et al., 2011). Yet, to keep the reality in accordance with expectations, tourism destinations have to showcase their unique identities, to also stand out among numerous similar offerings. This differentiation centres on the clear identification and promotion of the tourism destination's identity, transforming it into a distinct brand that resonates with potential tourists. Destination branding, therefore, becomes an essential strategy for enhancing the attractiveness and competitiveness of a tourism destination (Qu et al., 2011), and encapsulates its vision, promise, and meaning, guiding how it is perceived by visitors and other stakeholders (Kah et al., 2020).

Branding is a strategic approach that uses a range of markers—such as names, symbols, logos, slogans, and colour schemes—to distinguish a product or service from others (Kotler, 1997; Tasci & Gartner, 2009). In the context of tourism, branding encompasses the development of a destination's unique identity, which is constructed from various elements such as history, culture, natural landscapes, and local values (Cai, 2002). This identity represents a set of unique attributes and associations that collectively shape how a tourism destination is perceived in the global market (Kah et al., 2020). Destination branding is not only about creating a logo or visual identity but also about embedding deeper socio-cultural elements that convey the essence of the tourism destination to its audience. These elements must reflect the destination's social identity, community values, and sustainability efforts, which are crucial for making a destination recognisable and attractive to tourists.

2.2.1 Films as tools to brand the identity of a tourism destination

To effectively promote tourism destination brands, visual and narrative tools such as films and promotional videos have become indispensable. These mediums not only capture the attention of potential visitors but also offer an immersive, multi-sensory experience that extends beyond simple visual representation. For the community, films enable local filmmakers to present stories that resonate with their cultural heritage, thereby reinforcing a sense of community identity (Hsu & Huang, 2020). Through cinematic storytelling, films and videos can authentically convey the cultural essence and symbolic values of a tourism destination, building a deep connection with the audience (Riley et al., 1998).

Film locations can be turned into "icons" by associating them with specific concepts, themes, or emotions that go beyond the inherent characteristics of the place itself (Riley et al., 1998). Physical film location attributes encompass a range of elements that contribute to a destination's unique appeal, including natural attractions like scenic landscapes, mountains, diverse flora and fauna, wildlife, beaches, islands, waterfalls, and rivers; modern architectural landmarks, such as skyscrapers, sculptures, innovative architectural styles, and high-tech

buildings, add to the visual and experiential allure of a location; cultural attractions, featuring historical sites, monuments, museums, religious landmarks; and expressions of local culture, such as traditional foods, festivals, attire, and handicrafts, which collectively convey the essence of the destination's identity (Aitcheson & Reeves, 1998; Rahman et. al, 2019). By highlighting these elements, films can create a memorable "visual image" of the destination, which helps to establish it as a symbol of cultural heritage and tradition (Hudson & Ritchie, 2006; Beeton, 2016).

Films and videos that promote tourism destination identities rely on several key elements of branding to communicate the destination's unique attributes. These elements include natural attractions, cultural landmarks, historical sites, local lifestyle, and the social environment (Baloglu & McCleary, 1999). Through the strategic use of audiovisual techniques, filmmakers highlight these aspects, weaving them into the narrative to represent the destination's identity in an emotionally compelling way. Films are also instrumental in showcasing the cultural richness of a tourism destination, as they provide an authentic representation of local customs, traditions, and everyday life. The cultural identity of a destination, expressed through its geography, traditions, and behaviours, is a key element of its brand (Berrozpe et al., 2017). Films can highlight these cultural elements, from local festivals to traditional cuisine and attire, offering viewers a glimpse into the destination's lifestyle and inviting them to experience it first-hand.

Beyond the visual elements, narration and music in films and promotional videos further contribute to building the destination's identity. Filieri et al. (2021) highlight that narrative message in short tourism videos provide interpretative descriptions that enrich the visual content, offering insights into the destination's culture, history, and values. Music, as Cohen (2001) argues, plays a significant role in shaping the emotional experience of the viewer, since it enhances the visual content by conveying moods, emotions, and nostalgia, which contribute to the viewer's overall perception of the tourism destination. By showcasing the destination's natural beauty, cultural heritage, and local lifestyle, films help to establish a destination as an iconic place that attracts tourists through both its tangible and symbolic qualities.

Film festivals are one of the places where tourism films have the most visibility facilitate cross-cultural dialogue, encouraging greater understanding and appreciation of local customs, traditions, and values (Duvignau, 2019). While film festivals have the potential to enhance cultural identity, several challenges must be addressed. One concern is the commercialization of culture, which can lead to the dilution of authentic cultural expressions (Maitland & Bianchini, 2017). As festivals grow in popularity, there is a risk that local narratives may be overshadowed by mainstream representations that cater to broader audiences. Therefore, it is important to understand how identity is being portrayed at films and learn the best practices to keep films as a tool not only to showcase the cultural values of a destination, but also to attract new visitors and improve community representation and sense of pride.

3. Methodology

This research adopts a qualitative approach, employing content analysis of videos from the 17th edition of the ART&Tur Festival (2024). Data was collected from 42 films that were selected as finalists at ART&Tur festival (17th edition, 2024). Given the subject in study and time constraints only films promoting tourism destinations, with less than 5 minutes of length have been selected for analysis. On total, the sample comprised 16 films.

As far as content analysis is concerned, the films were visualized in two moments: a first viewing, as a leisure viewer, which allowed the authors to gather initial impressions; a second moment to verify if the dimensions of analysis proposed in table 1 were present in the videos and a third moment to count how many times each dimension of cultural identity was reflected in the tourism promotional videos. A careful observation of the film was conducted, in order to list the visual and linguistic elements that directly allude to the elements under analysis. Data analysis consisted of relative frequencies distribution for items examination and was carried out with Microsoft Excel.

Table 1: Dimensions of analysis by author

Dimensions of analysis	Authors
Logo, design, or symbol; Tourism destination name; Colours and visual palette	Kotler, 1997; Tasci & Gartner, 2009
Iconic sites – only built heritage/architecture	Aitcheson & Reeves, 1998; Cai, 2002; Rahman et. al, 2019
Representations of cultural practices	Aitcheson & Reeves, 1998; Cai, 2002; Rahman et. al, 2019

Dimensions of analysis	Authors
Traditional attire and dress	Aitcheson & Reeves, 1998; Rahman et. al, 2019
Use of local materials	Aitcheson & Reeves, 1998; Rahman et. al, 2019
Local cuisine	Aitcheson & Reeves, 1998; Rahman et. al, 2019
Local people and lifestyles	Aitcheson & Reeves, 1998; Rahman et. al, 2019
Local music or sounds	Filieri et al. (2021) and Cohen (2001)
Traditional musical instruments	Aitcheson & Reeves, 1998; Rahman et. al, 2019
Languages or accents	Filieri et al. (2021) and Cohen (2001)
Traditional tales	Aitcheson & Reeves, 1998; Rahman et. al, 2019

4. Results

After carefully analyzing the videos and paying attention to the cultural elements in each of them, the following branding characteristics were identified in the tourism promotion videos: “tourism destination name”, “logo, design, or symbol”, “colors and visual palette”, “language or accents”, “message conveyed”, “iconic sites”, “cultural practices”, “local music and other sounds”, “traditional attire and dress”, “local people and lifestyle”, “local cuisine” and “art”.

Each of these branding characteristics appeared in at least one of the selected tourism promotional videos.

Table 2: Dimensions present in the films under analysis

Number	Project Title	Duration	Tourism destination name	Logo, design, or symbol	Colors and visual palette	Landscapes	Iconic sites – only built	Representations of	Traditional attire and	Use of local materials	Local cuisine	Local people and	Local music or sounds	Traditional musical	Languages or accents	Traditional tales	Desporto e Animação	Art	Written message
1	It's only 3 days	00:03:54	x	x		x	x	x		x	x	x		x			x	x	x
2	Grand Train Tour of Switzerland. The Ride of a Lifetime	00:03:45	x	x		x	x					x			x				x
3	Sweden (not Switzerland)	00:01:53	x	x	x	x						x					x	x	x
4	It's to Celebrate	00:02:15	x			x	x			x	x							x	x
5	Covilhã, have time for yourself	00:01:46	x	x		x	x	x		x	x	x		x				x	
6	For Sure, they are from the north.	00:01:48	x			x	x	x	x	x	x	x	x	x			x		x
7	Far From The World - A Bleu Evasion Story	00:01:36	x			x	x	x									x		x
8	Peru Wow	00:01:39	x	x		x	x	x	x		x	x					x		x

Number	Project Title	Duration	Tourism destination name	Logo, design, or symbol	Colors and visual palette	Landscapes	Iconic sites – only built	Representations of	Traditional attire and	Use of local materials	Local cuisine	Local people and	Local music or sounds	Traditional musical	Languages or accents	Traditional tales	Desporto e Animação	Art	Written message
9	Valley of Cambra, with great delight.	00:02:46	x			x	x	x		x	x	x					x	x	x
10	Operation 4	00:03:32	x			x	x	x	x		x	x	x				x		x
11	Bydgoszcz- More Beautiful Than You Think	00:02:03	x	x		x	x	x				x						x	x
12	Make your own movie	00:03:15	x			x	x	x	x		x	x					x	x	x
13	Coimbra, the right place	00:03:23	x			x	x	x				x	x	x				x	x
14	Greenland's Authentic Intelligence	00:02:15	x			x	x	x			x	x					x	x	x
15	You hit the bull's eye - Castelo Branco	00:04:11	x	x		x	x	x			x	x		x			x	x	x
16	Sintra, a land of timeless beauty	00:02:12	x	x		x	x					x		x					x

4.1 Tourism Destination Name

All tourism destinations have their name appearing on the screen, written or spoken.

4.2 Logo, Design, or Symbol

Only 50% of the films show the national flag or any other symbol that represent the tourism destination. The fact that only half of the film locations promote it on the screen lead us to assume that visitors don't associate the national symbol with the image they have of the tourism destination. Other destination attributes seem to be more important to attract tourism.

4.3 Colors and Visual Palette

Only one film (from Sweden Tourism Destination) seemed to have picked a palette of colors in accordance to the country national flag.

4.4 Language or Accents

None of the destinations featured in the films have English as their native language. Nevertheless, English seems to be the preferred linguistic code to communicate. If the name of the destinations seems to be of major importance to reinforce the identity of the tourism destination, the native language is less important. When it comes to cultural identity of tourism destinations the dimension 'languages of accents' seem to have minor importance, since the trend is to use a code that is understood by the majority of visitors. Although it is justified by the need to promote one destination worldwide (being English global language), this type of attitudes

speculates a start of the depravity of an identity, by taking the relevance of the mere pronunciation and typical sentences from the places being promoted.

It is worth mentioning that 90% of the films are either spoken in English or in the tourism destination native language but have subtitles in English. Switzerland seems to be very proud of their native languages since apart from English, also have some notes in French and German. Films narrated in local languages with subtitles in English not only provide cultural authenticity and understanding but also helps to preserve and promote these languages. This approach makes it possible for attendees to connect with the nuances of the language and expressions.

4.5 Message Conveyed

From the 16 tourism destinations analyzed, 11 have a message written in English. Only four have preferred to write in the destination native language (Portuguese or French). The most common messages shared by the tourism destination in analysis are:

- Give a sense of being in the right place: 'it's easy to like', 'right place',
- Call for action: 'you need', 'sign the agreement', 'make your own movie', with 31,5% of the tourism destinations mentioning the word visit directly.
- Give a feeling that there is more to discover: 'A lot to discover', 'more beautiful than you think', 'of a different nation'
- Go beyond mundane life: 'to celebrate', 'a place of dreams and magic'
- Sense of pleasure: 'with great delight', 'wow', or,
- Associate with relaxing ('l'in du monde', 'relax').

As per words spoken in the films that is word mentioning, 'saudade' appears in 25% of the films that feature the tourism destination Portugal, a very Portuguese word, without direct translation in any other language.

4.6 Iconic Sites

The films prominently feature a variety of iconic sites, with the most frequently depicted being cities (including rooftops, aerial views, and landscapes), historical villages or centers, manor houses, churches or convents, and walkways. Other notable sites include palaces, bridges, modern buildings, theatres or opera houses, ruins, fortresses, castles, libraries, and museums. Additionally, less prominent landmarks such as wine cellars, roads, train stations, geodesic landmarks, historical centers, fish-scale house walls, traditional houses, historical military and civilian buildings, universities, and cave paintings also make appearances. Aerial views of cities, urban landscapes, and historical centers dominate the visuals, followed by manor houses and religious buildings. Walkways are well-represented, highlighting the significance of outdoor and nature-related activities in tourism destinations. These walkways enhance the natural landscape, offering opportunities for healthy and nature-centered tourism.

In addition, palaces are frequently showcased, alongside both modern and ancient bridges, illustrating that cultural identity in tourism destinations is shaped not only by historical landmarks but also by contemporary architecture. The representation of theatres and other entertainment venues further suggests that leisure and amusement are important elements of a destination's appeal. The inclusion of ruins, fortresses, castles, and cultural institutions such as libraries and museums underscore the role of cultural heritage in tourism promotion. These landmarks not only provide a glimpse into the past but also contribute to a destination's ongoing cultural identity.

4.7 Representations of Cultural Practices

This category is represented through various elements, including handicrafts such as tile-making, painting, clay molding, gold filigree, lacework, stained glass craftsmanship, and gilded woodwork. It also encompasses celebrations, such as popular festivals, folklore events, Carnival, medieval festivities, and diverse forms of dance, both traditional and modern. Additionally, it highlights musical expression, featuring instruments like the Portuguese guitar, classical guitar, xylophone, accordion, and piano. Professional activities are also depicted, including fishing and cattle farming, offering a glimpse into traditional livelihoods.

Cultural practices are prominently featured in destination representations, often highlighting traditional activities such as fishing or cattle herding. However, these practices are frequently presented in a commercialized and curated manner, focusing more on creating visually appealing scenes than on depicting authentic, lived experiences. This approach can obscure the true essence of local traditions and the everyday

lives of residents, emphasizing spectacle over substance. As a result, cultural and traditional elements may be romanticized or simplified, portraying an idealized image that may not fully reflect the genuine cultural identity of the destination.

In this dimension, handicrafts and related activities lead the category, followed by music and dance celebrations, both religious and profane, ancient or modern. This includes playing musical instruments, like the classical and Portuguese guitar, the piano, the xylophone and the accordion, among other traditional devices.

4.7.1 Local music and other sounds

All videos have music playing while displaying the images. Nevertheless, instrumental popular music and other traditional music, like Fado or popular singing are shown. This tells us that music plays an important role in showcasing the identity of the destination, but tradition accommodates new trends.

4.7.2 Traditional attire and dress

The videos feature various images of traditional attire and dress, including fishermen and their wives in customary costumes, individuals dressed in local attire dancing or celebrating nature, and scenes from markets showcasing traditional clothing. Notable examples include a woman in traditional dress engaged in lacework and musicians adorned in local costumes. Traditional attire and dress are frequently depicted alongside music and dance, often in the context of showcasing ancient professions and handicrafts, highlighting their cultural and historical significance. Yet again, scenes are embellished to create a more cinematic image, sometimes overshadowing the deeper history of the destination.

4.8 Local People and Lifestyles

The films showcase various aspects of local people and lifestyles, depicting convivial moments such as gatherings in open-air hot tubs, on rooftops, at the beach, in coffee shops, and at traditional celebrations, as well as scenes of people playing cards, enjoying lakes and swimming pools, dancing in discos, and watching fireworks. People of all ages and roles appear, including celebrities, families, children, elderly individuals, university students in local costumes, a Portuguese woman from the north, and smiling individuals, alongside more personal moments like a mother and child painting a boat or groups sharing meals. Relaxation is portrayed through activities such as reading and playing outdoors, walking along marinas, and enjoying gardens with pets. Rural and everyday life are captured with images of picnics, clothes drying on lines, fishermen at work, and Coimbra's student houses, offering a glimpse into authentic lifestyles.

Conviviality and social gatherings are key elements in the films, appearing in various forms such as beach meetups, coffee shop interactions, and traditional games or celebrations. These gatherings predominantly feature older individuals and families, emphasizing close-knit, intergenerational connections. Hospitality is also a significant theme, with smiling faces frequently depicted, conveying warmth and openness. Native celebrities play a prominent role in the films, shaping local self-perception and fostering national pride. Additionally, some destinations link their identity to a sense of freedom and relaxation, portrayed through images of people enjoying outdoor activities like playing with pets or reading in public gardens. The films highlight various lifestyles, particularly those rooted in the countryside and open-air activities, where individuals feel more connected to nature, often gathering together to celebrate.

4.9 Local Cuisine

The films showcase various aspects of 'local cuisine,' including traditional products such as fish, olive oil, wine, and cheese, all of which are highlighted multiple times. Meals and cooking scenes are also prominently featured, with a focus on traditional dishes and local markets. The films highlight cooking ingredients like herbs, mushrooms, parsley, and sausage, and showcase the restaurant setting, often featuring chefs preparing local dishes. There are also moments capturing children and celebrities enjoying traditional pastries, as well as shrimp being transported from the fish market to the restaurant. A wine barrel is also shown, reinforcing the importance of local products in the culinary identity of the destination.

Gastronomy is present in 62,5% of the films, with a dominance of local products which appear being cooked or in a set meal.

4.10 Art

The films feature several notable items related to 'art,' including paintings and sculptures, which appear multiple times, as well as museums showcasing these art forms. Wall paintings, statues, and stained-glass windows are

also highlighted, contributing to the cultural richness of the destinations. Additionally, gilded woodwork, fashion, precious stones, and decorative tiles are showcased, further emphasizing the artistic heritage and craftsmanship integral to the identity of the places depicted.

Around 62,5% of the tourism destinations display different forms of art. Sculpture and painting are the most celebrated form of art. Either they appear on the screen in open air or inside museums. This dimension should be included when assessing the cultural identity. It is a form of people to express the feelings and ideas. It can be considered as a complement of the dimension 'representations of cultural practices'.

5. Conclusion and Discussion

Film festivals, particularly those focused on tourism promotion, act as important platforms for both showcasing and preserving cultural identity. They serve as microcosms of a region's heritage, offering a stage for local narratives, artistic expressions, and social issues. The findings from this study reveal that tourism promotion videos from the ART&Tur Festival (2024) strategically incorporate a variety of cultural elements to craft the identity of each destination. By showcasing films that depict local customs, values, and social issues, these events enhance the visibility of cultural identities on an international stage (Ishmael, 2017). Film festivals contribute to foster cultural identity that resonates with both residents and visitors. By attracting visitors interested in diverse narratives, film festivals create a sense of belonging among local communities (Davis, 2023).

Among the most prominent elements are iconic sites such as historical centers, manor houses, and religious buildings, which are consistently highlighted as central to the destination's identity. These iconic sites, often shown through aerial views or close-ups of architectural details, create a visual connection to the cultural heritage of the region. Additionally, modern infrastructure, such as bridges and theaters, plays an equally important role in portraying a dynamic blend of tradition and contemporary culture, signaling to viewers that the destination is not only historically rich but also evolving and welcoming to new forms of tourism. This representation of both the ancient and modern suggests that the identity of these destinations is shaped by a complex interplay of history and modernity, offering a multifaceted experience to potential visitors.

In addition to physical landmarks, the videos also emphasize cultural practices as vital components of the destination's identity. Handicrafts are showcased, reflecting a deep connection to local traditions and craftsmanship. Music and dance further enrich the cultural tapestry with instruments playing a significant role in representing local culture. These cultural practices are not only presented as static traditions but are often accompanied by celebrations, festivals, and gatherings that involve local people of all ages. This portrayal of conviviality and intergenerational interaction, particularly through scenes of family gatherings, social celebrations, and traditional activities, underscores the importance of community and social life in shaping the character of the destination. Furthermore, the presence of native celebrities in the videos plays a crucial role in fostering national pride and reinforcing a sense of identity, as they are seen as symbols of local authenticity and pride.

However, it is important to contextualize these representations through the lens of Cultural Identity Theory (CIT), which emphasizes the role of social context and power dynamics in shaping cultural identity (Collier, 2005). In tourism videos, the portrayal of a destination's culture is often influenced by the tourism industry, which has a vested interest in presenting an appealing, accessible, and sometimes idealized image. This can lead to power imbalances, where the voices of local communities may be minimized or redefined in favor of a narrative that aligns with tourists' expectations. To overcome this issue, local community may contribute to the film script.

5.1 Theoretical implications

This study has significant theoretical implications for the understanding of cultural identity in tourism media, particularly through the lens of Cultural Identity Theory (CIT). Tourism videos often highlight specific cultural elements—such as music, food, and attire—while downplaying others, creating a performative culture tailored to tourists' expectations. This selective portrayal reflects the ongoing negotiation of identity, where local communities may feel pressure to adapt or perform certain cultural traits to align with the tourism narrative.

Additionally, this study contributes to theories of cultural diplomacy and globalization by exploring how tourism media acts as a platform for local cultures to be presented on the global stage. Tourism videos, as key tools in cultural diplomacy, allow destinations to showcase their heritage, but they also risk reinforcing stereotypes or oversimplifying complex identities. Tourism videos, while preserving cultural elements, often reframe them for marketability, potentially altering their original meanings. This research deepens our understanding of how

cultural identity is both protected and transformed in the face of globalization, highlighting the intricate relationship between local culture, tourism industries, and global audiences.

5.2 Practical Implications

The core appeal of tourism films lies in their ability to present the identity of the destination as culturally attractive and unique. By focusing on specific cultural features, tourism films position these elements as differentiators that make the destination appealing. Film makers can use the cultural identity of a destination to create a sense of uniqueness and exclusivity, encouraging viewers to seek experiences that seem both authentic and distinctive.

For tourism marketers, understanding this is essential for creating respectful, nuanced portrayals that honor the diversity and authenticity of the culture they are promoting. A respectful approach enhances the visitor experience, foster pride in host community and create a more positive, sustainable relationship between visitors and the visited region. By carefully balancing the presentation of traditional and modern aspects of a destination, marketers can create more inclusive, authentic representations that reflect the dynamic nature of local cultures. This also includes avoiding the oversimplification or stereotyping of cultural practices, which could alienate local populations or mislead tourists about the true cultural landscape.

For local communities, the study emphasizes the importance of being actively involved in the creation of tourism promotional materials. This ensures that their culture is accurately and respectfully represented, and that any adaptations made for the tourism market do not result in the loss of cultural integrity. Lastly, cultural policymakers can use the insights from this research to foster collaborations between local stakeholders and the tourism industry, promoting cultural preservation while still embracing the economic opportunities tourism brings. This approach can enhance cultural diplomacy and contribute to a more sustainable and ethical tourism industry.

5.3 Limitations and Future Research

This study may not fully represent the diversity of approaches used by the global tourism industry in showcasing cultural identity. Since the sample is limited to videos from a particular festival and year, the findings may not be generalizable to all tourism promotional materials or global contexts. Future research could expand the scope by examining tourism videos from a broader range of festivals, countries, and promotional platforms, to provide a more comprehensive understanding of how cultural identity is communicated in contemporary tourism marketing.

While the study focuses on specific cultural elements, the interpretation of these elements may vary depending on the researcher's perspective and cultural background. Future studies could incorporate a more diverse range of perspectives, including those of local community members, to ensure that cultural representations are not only authentic but also inclusive of multiple viewpoints. It is suggested to evaluate a new dimension for promotional tourism videos—identity stereotyping—to understand the extent to which community practices, cultures, and values are being exploited and commercialized to create a visually appealing scene. Additionally, future research could investigate the long-term impact of tourism videos on local communities, exploring how continuous exposure to specific cultural portrayals influences local identity and tourism behavior.

Acknowledgement

Funded by project FAST, Agenda ATT | PRR

References

- Baloglu, S. and McCleary, K. (1999) 'A model of destination image formation', *Annals of Tourism Research*, 26, pp. 868–897.
- Berrozpe, A., Campo, S. and Yagüe, M. J. (2017) 'Understanding the identity of Ibiza, Spain', *Journal of Travel and Tourism Marketing*, 34(8), pp. 1–14. <https://doi.org/10.1080/10548408.2016.1272525>
- Brah, A. (2006). Diferença, diversidade, diferenciação. *Cadernos pagu* (26), 329-376.
- Cai, L. A. (2002) 'Cooperative branding for rural destinations', *Annals of Tourism Research*, 29(3), pp. 720–742. [https://doi.org/10.1016/S0160-7383\(01\)00080-9](https://doi.org/10.1016/S0160-7383(01)00080-9)
- Cohen, A. J. (2001) 'Music as a source of emotion in film', in P. N. Juslin and J. A. Sloboda (eds.) *Music and emotion: Theory and research*. Oxford: Oxford University Press, pp. 249–272.
- Collier, M. J. (2005) 'Context, privilege, and contingent cultural identifications in South African group interview discourses', *Western Journal of Communication*, 69(4), pp. 295–318. doi: 10.1080/10570310500305141

- Collier, M. J. (2009) 'Contextual negotiation of cultural identifications and relationships: Interview discourse with Palestinian, Israeli, and Palestinian/Israeli young women in a U.S. peace-building program', *Journal of International and Intercultural Communication*, 24, pp. 344–368. doi: 10.1080/17513050903177292
- Davis, L. (2023) 'Cultural identity in cinema: A study of the Montreal World Film Festival'.
- Duvignau, A. (2019) 'The role of film festivals in cultural exchange', *Cultural Studies Review*, 25(2), pp. 1–15.
- Filieri, R., Lin, Z., Pino, G., Alguezaui, S. and Inversini, A. (2021) 'The role of visual cues in eWOM on consumers' behavioral intention and decisions', *Journal of Business Research*, 135, pp. 663–675. <https://doi.org/10.1016/j.ibusres.2021.06.055>
- Hall, S. (2006). The centrality of culture: notes on the cultural revolutions of our time. In: THOMPSON, Kenneth (ed.). *Media and cultural regulation*. London, Thousand Oaks, New Delhi: The Open University; SAGE Publications, 1997. (Cap. 5). Disponível em http://www.gpef.fe.usp.br/teses/agenda_2011_02.pdf. [6 outubro 2024]
- Hsu, C. H. C. and Huang, S. (2020) 'The impact of film festivals on cultural identity', *Journal of Travel Research*, 59(7), pp. 1192–1205.
- Kah, J. A., Shin, H. J. and Lee, S. H. (2020) 'Traveler sensoryscape experiences and the formation of destination identity', *Tourism Geographies*, 24(2–3), pp. 475–494. <https://doi.org/10.1080/14616688.2020.1765015>
- Kotler, P. (1997) *Marketing management: Analysis, planning, implementation, and control* (9th ed.). Prentice Hall.
- Maitland, R. and Bianchini, F. (2017) 'Cultural events and urban change: The case of film festivals', *European Planning Studies*, 25(6), pp. 1033–1050.
- Qu, H., Kim, L. H. and Im, H. (2011) 'A model of destination branding: Integrating the concepts of the branding and destination image', *Tourism Management*, 32, pp. 465–476. <https://doi.org/10.1016/j.tourman.2010.03.014>
- Rahman, N., Md. Dawam, Z. and Chan, J. K. L. (2019) 'The characteristics of film products to induce tourism', *Journal of Tourism, Hospitality and Environment Management*, 4, pp. 84–99. <https://doi.org/10.35631/JTHEM.416007>
- Riley, R., Baker, D. and Van Doren, C. S. (1998) 'Movie-induced tourism', *Annals of Tourism Research*, 25(4), pp. 919–935. [https://doi.org/10.1016/S0160-7383\(98\)00045-0](https://doi.org/10.1016/S0160-7383(98)00045-0)
- Smith, A.D. (1991) *National Identity*. Penguin Books, London
- Tasci, A. and Gartner, W. (2009) 'A Practical Framework for Destination Branding', in *Bridging Tourism Theory and Practice*, 1, pp. 149–158. [https://doi.org/10.1108/S2042-1443\(2009\)0000001013](https://doi.org/10.1108/S2042-1443(2009)0000001013)
- Yeo, A. and Cao, F. (2021) 'A Creative Research Process for a Modern African Graphic Design Identity. The Case of Ivory Coast', *Art and Design Review*, 9, pp. 210–231. <https://doi.org/10.4236/adr.2021.92017>

Evaluating the Current Developments and Future Prospects of Agritourism: The Case of Cyprus

Stelios Marneros¹, Andreas Efstathiades², Nikolaos Boukas² and George Papageorgiou²

¹Department of Hospitality and Tourism Management, School of Tourism Management, Hospitality and Entrepreneurship, Cyprus University of Technology, Cyprus

²Department of Management and Marketing, School of Business Administration, European University Cyprus, Cyprus

Stelios.Marneros@cut.ac.cy

A.Efstathiades@euc.ac.cy

N.Boukas@euc.ac.cy

G.Papageorgiou@euc.ac.cy

Abstract: This paper aims to investigate the prospect of agritourism in the island of Cyprus. For this purpose, primary research was carried out by collecting data through face-to-face in-depth interviews with managers/owners of a representative sample of agritourism establishments. Particular focus was placed on current developments and future scenarios of how agritourism can become an alternative sustainable form of tourism in the Cypriot tourism industry. Note that Mass tourism is currently frowned upon due to its negative effects. On the other hand, special interest or alternative tourism, could have fewer negative impacts on tourist sites and help battling the negative effects impact of mass tourism. In the case of agritourism tourists or otherwise visitors stay on farms, while at the same time participating in work related to agriculture or agricultural activity. It was found that this type of tourism can contribute both to the strengthening of the countryside and the elimination of some of the regional disparities. It is thus a form of sustainable tourism and it has now part of the development strategy of the European Union to support disadvantaged rural regions in countries where agriculture and farming occupy a small part of the GDP. The findings for the case of Cyprus provide entrepreneurs and tourism institutions, suggestions for the effective development of agritourism, that could also fill in the gap during the low demand seasonality periods and further support neglected rural communities.

Keywords: Cyprus tourism, Agritourism, Alternative tourism, Special interest tourism, Sustainability, Hospitality management

1. Introduction

Although Cyprus is primarily known for its summer attractions, the island's diverse/rich landscape and environmental biodiversity offers opportunities beyond its coastal and climatic appeal. Specifically, agritourism provides both locals and visitors with an alternative way to experience Cyprus, highlighting its rural heritage and sustainable tourism potential. Unlike the seasonal nature of coastal tourism, agritourism extends throughout the year, allowing for a deeper engagement with the island's natural/cultural landscape.

Particularly, agritourism could play a crucial role in Cyprus by fostering rural development, preserving cultural heritage, and promoting sustainable tourism. As a country with a rich agricultural tradition, Cyprus has significant potential to leverage agritourism as a means of revitalizing rural communities, diversifying the tourism sector, and reducing the dependence on mass tourism. By integrating farming activities within tourism experiences, agritourism supports local economies, encourages sustainable practices, and enhances the visitor experience by offering authentic, eco-friendly alternatives. Moreover, in the context of global sustainability goals, agritourism can serve as a vital tool for conserving biodiversity, promoting responsible land use, and ensuring long-term environmental and economic resilience. As Cyprus seeks to diversify its tourism offerings beyond its renowned beaches, agritourism emerges as a vital component, attracting visitors year-round and contributing to the sustainable development of rural communities (fastforward.com.cy, 2023).

On the other hand, agritourism in Cyprus faces several key challenges in transitioning toward sustainable development model. According to Boukas (2019), these include seasonality, regional disparity, and/or unsustainable development, limited infrastructure, lack of collaboration among stakeholders, and insufficient knowledge and awareness of sustainable tourism practices. Moreover, the overconcentration of tourists on coastal areas, leave other peripheral ones, such as mountainous and rural, out of the developmental equation. This situation leads to many lost opportunities (Boukas, 2021) for sustainable development. Addressing these challenges requires comprehensive strategies, including fostering integrated rural tourism, enhancing stakeholder education on sustainability, providing financial and policy support to small enterprises, and aligning tourism practices with global sustainability frameworks. Specifically, this paper evaluates the current sustainable development and future prospects of agritourism in Cyprus, as an alternative to (mass) tourist destination with

its evident traces of negative effects of over-mass-tourism and neglected peripheral development (Boukas and Marneros, 2024).

This paper aims to fill-in a critical gap in the existing literature by introducing a comprehensive framework designed to assess the influence of agritourism on local development, with a particular focus on Cyprus economies. Given the unique socio-economic/environmental challenges faced by island communities, the proposed framework provides a systematic approach in evaluating how agritourism contributes to sustainable rural development, economic diversification, and cultural preservation. By doing so, this research study enhances the understanding of agritourism's role as a catalyst for local resilience and long-term sustainability in Cyprus.

2. Review of Related Studies

2.1 Agritourism as an Aspect of Alternative Tourism

Alternative tourism refers to a form of tourism that emphasizes sustainable practices, cultural authenticity, and meaningful interactions between tourists and local communities, while minimizing environmental and social impacts. Unlike mass tourism, alternative tourism prioritizes small-scale, low-impact activities that promote cultural exchange, environmental awareness, and local economic development (Papageorgiou and Lytras, 2015). This type of tourism encompasses various subcategories, such as ecotourism, agritourism, adventure tourism, and cultural tourism. According to Weaver (2020), alternative tourism seeks to create a balance between the needs of tourists, host communities, and the environment, thereby fostering long-term sustainability in the tourism sector. Similarly, Smith and Eadington (1992) describe alternative tourism as a niche-oriented approach that provides a counterbalance to the commodification and environmental degradation associated with conventional tourism models. According to Spanaki (2018), modern agritourism emerged in the United States during the 1960s as "Farm and Ranch Hospitality," encompassing variations such as Agricultural Tourism (farm/ranch-based) and Rural Tourism (hotel/resort-based). Over time, it has developed into a structured tourism sector, supported by a robust network of firms, improved infrastructure.

Specifically, agritourism is a specialized form of alternative tourism that focuses on agricultural activities and rural settings, offering visitors opportunities to engage with farming practices, local culture, and traditional lifestyles. It is defined by the interaction between tourism and agriculture, where tourists participate in farming activities, such as harvesting crops, feeding animals, or producing local products, while experiencing the rural way of life. According to Kokkosis et al., (2011), agritourism promotes sustainable development by utilizing rural resources, preserving cultural heritage, and providing supplementary income to farmers. Similarly, Barbieri and Mahoney (2009) highlight that agritourism contributes to rural economic diversification, fosters community engagement, and enhances environmental awareness among visitors. This tourism model emphasizes a balance among recreation, education, and conservation, making it an essential component of sustainable rural development.

In related studies, the term "agritourism" is interpreted in various ways and is often used interchangeably with related concepts such as "agritourism," "farm tourism," "farm-based tourism," and "rural tourism." Santeramo and Barbieri (2017) define agritourism as "visiting a working agricultural setting—usually a farm or ranch—for leisure, recreation, or educational purposes." Similarly, Tew and Barbieri (2012) describe agritourism as "any activity in which a visitor to the farm or other agricultural setting contemplates the farm landscape or participates in an agricultural process for recreation or leisure purposes." Additionally, Kizos and Iosifides (2007, p.4) define agritourism in Greece as "any farm-based business offered for the enjoyment and education of the public, to promote the products of the farm, and thereby generate additional farm income". These definitions highlight the multifaceted nature of agritourism, encompassing recreational, educational, and economic dimensions while reinforcing the role of agricultural settings as both productive and experiential spaces.

2.2 Agritourism and Sustainability

Within the broader context of agritourism, sustainability has been identified as a key challenge, given its potential benefits across social, environmental, and economic dimensions (Ammirato et al., 2013). A recent study specifically examined sustainability in oleotourism, a niche form of agritourism focused on olive-related experiences, identifying both sustainable practices already in place and areas requiring further development (Trequa et al., 2018). Moreover, the anticipated expansion of oleotourism is closely tied to various sustainability-related factors, reinforcing its relevance within the broader discourse on sustainable tourism. Ciolac et al. (2020), argue that sustaining rural communities often emphasize improving quality of life, with agritourism emerging as

a key strategy. Agritourism presents a valuable opportunity for the sustainability of mountain rural areas due to its multiplier effect on both economic and social aspects of local communities.

Another study by Songkhla and Somboonsuke (2013), examines the relationship between agro-tourism and local agricultural resource management to identify sustainable agro-tourism practices. The research highlights key activities, including agricultural processing demonstrations, farming practices, farm product distribution, and agri-business guidance, contributing to sustainable resource use in tourism. Garau (2015) explores strategic actions for effectively disseminating cultural resources to support cultural planning. The findings highlight key insights into smart, sustainable rural tourism development, emphasizing the need to balance globalization, nature, tourism, local places, and communities.

Agritourism offers both opportunities and challenges in achieving sustainable tourism. Recent studies highlight its potential to address global challenges (Kataya, 2021; Popescu et al., 2023; Papageorgiou et al., 2023), yet significant research gaps remain. Notably, there is limited understanding of how to develop and manage sustainable agritourism models and ensure their long-term viability (Paniccia & Baiocco, 2021). A current study by Ammirato et al. (2020), seeks to offer a comprehensive overview of the various perspectives in scientific literature regarding agritourism as a tool for supporting the sustainable development of rural areas.

A more detailed and critical review of current studies on agritourism's role in the sustainability agenda of tourism is necessary to assess its actual contributions and limitations. While agritourism is widely recognized for its potential to support sustainable rural development by fostering economic diversification, preserving cultural heritage, and promoting environmental conservation (Barbieri, 2013; Tew & Barbieri, 2012), existing research often lacks a comprehensive evaluation of its long-term sustainability impacts. Many studies focus primarily on its economic benefits, such as income generation for farmers and job creation in rural areas (Philip, Hunter, & Blackstock, 2010), but fewer critically examine environmental concerns, including land degradation, excessive water consumption, and biodiversity loss. Moreover, research on the social sustainability of agritourism—such as its influence on community resilience, social equity, and rural depopulation—remains fragmented and requires further empirical investigation. A systematic and critical synthesis of these studies is needed to identify gaps in knowledge and provide a more nuanced understanding of agritourism's role in achieving broader sustainability goals.

Additionally, variations in policy frameworks, governance structures, and consumer behavior across different regions highlight the need for comparative and longitudinal studies to evaluate best practices in sustainable agritourism. While some regions have successfully integrated agritourism into sustainability policies, ensuring responsible land use and community participation (Hjalager, 1996), others lack regulatory mechanisms, leading to over-commercialization and environmental degradation. Furthermore, consumer demand for sustainable tourism experiences is growing, but research on how visitor motivations and behaviors influence agritourism's sustainability outcomes remains limited (Sonnino, 2004). By critically reviewing empirical studies that examine the intersection of agritourism, governance, and consumer trends, future research can offer evidence-based recommendations for policymakers, tourism planners, and agritourism operators. Such a review would not only enhance academic understanding but also contribute to the practical development of agritourism as a key component of sustainable tourism.

2.3 Factors Contributing to the Growing Interest in Alternative Tourism in Cyprus

While Cyprus is a traditional Mediterranean destination, it has mainly been development under the conventional, mass tourism form, without any emphasis on sustainability (Boukas, 2019). Nonetheless, a series of factors collectively highlight the strategic importance of transitioning to more sustainable and diversified tourism practices in Cyprus. Towards this goal, interest in alternative and special forms of tourism on the island, has intensified particularly in the last two decades. Deputy Ministry of Tourism, as well as development companies and organizations (Agritourism 2025) are trying to promote their implementation by drawing up programs. Private sector investors are also taking the necessary business and investment initiatives. Cyprus is strategically shifting from its traditional sun-and-sea tourism model toward a more sustainable and diversified approach, incorporating agritourism, nature-based tourism, and cultural experiences (Koutra and Karyopouli, 2013). This transition responds to environmental concerns and evolving tourist preferences while promoting year-round and regionally balanced tourism development. A notable initiative in this effort is the "Colorful Villages" certification, which recognizes lesser-known villages for their sustainability, authenticity, and natural beauty.

Further, Cyprus has expanded its air connectivity to attract a more diverse tourist base, mitigating the decline in visitors from traditional markets like Russia. This strategy aligns with global tourism trends favoring independent travelers, who explore destinations more extensively and distribute tourism demand more evenly. By prioritizing the development of rural areas and reducing dependence on coastal resorts, Cyprus aims to establish a sustainable tourism framework that minimizes environmental impact while fostering economic and cultural benefits for local communities (Bramwell, 2004).

2.4 Agritourism: General Overview and its Development in Cyprus

The annual growth rate of agritourism in Cyprus since 2018 is 20% (Cystat, 2025). There are 150 registered agritourism establishments across the island, offering diverse and immersive experiences. The estimated annual contribution of agritourism to the Cypriot economy is about 40 million euros. The number of individuals employed directly or indirectly in the agritourism sector are 1500 plus jobs. The proportion of agritourism establishments integrating sustainable practices, such as water conservation and renewable energy is 60%, and the estimated reduction in carbon footprint for travelers choosing agritourism over conventional tourism options is 30%.

Cypriot agritourism accommodations offer high-quality services, including modern amenities. Guests can enjoy unique experiences, such as interacting with locals, visiting wineries, dining in traditional taverns, and participating in activities like hiking, cycling, and cooking classes. This tourism model emphasizes the people, culture, and natural environment of Cyprus, fostering a deeper connection between visitors and rural life (agritourism.com.cy). Particularly, Grillini et al. 2025, describe agritourism as a tourism model where visitors stay in rural or farm accommodations, often participating in daily farming activities, consuming local food, and engaging in rural traditions. This form of tourism bridges the gap between the tourism and agricultural sectors, promoting local sustainability, resource utilization, and cultural preservation. It also highlights the importance of infrastructure, such as road networks and transportation, to facilitate access to rural areas.

Agritourism provides "rural experiences" that combine agricultural settings with tourism activities, generating income for farmers and local communities (Willaddara et al. 2024). These experiences require open spaces, minimal urbanization, and opportunities for visitors to engage with agricultural practices, local crafts, culinary traditions, and cultural heritage, causes of increasing interest in alternative forms of tourism in Cyprus.

In Cyprus, agritourism is characterized by:

- The small and scattered size of rural settlements compared to other European countries.
- Integration with the agricultural sector, offering farmers supplementary income.
- The development of small and medium-sized enterprises that preserve and promote cultural heritage.
- Opportunities for urban dwellers to experience peace, contribute to the local economy, and engage with rural culture.
- Its role as a key component of the rural economy.

Overall, agritourism in Cyprus capitalizes on natural, cultural, and human resources to meet the demands of contemporary tourists while supporting small-scale, family-operated businesses.

3. Methodology

The methodological approach employed in this study was primarily exploratory in nature, involving a review of various official documents and conducting face-to-face, in-depth interviews with a representative sample of seven owners, policymakers, of agritourist establishments in Cyprus from the areas of Nicosia, Limassol, Larnaca and Paphos (see Table 1). Each interview lasted approximately one hour and took place at the respective establishments of the interviewees. The interviews were conducted between November and February. The evaluation was carried out based on a semi-structured discussion with the selected interviewees on the following questions:

- How do you evaluate Agritourism in Cyprus?
- Through your own experiences can you tell me what are the positive/negative economic dimensions of the phenomenon of Agritourism in Cyprus?
- Through your own experiences can you tell me what are the positive/negative social dimensions of the phenomenon of Agritourism in Cyprus?
- Through your own experiences can you tell me what are the positive/negative environmental dimensions of the phenomenon of Agritourism in Cyprus?

- Do you consider the implementation of sustainable development practices and environmental certifications (eco-labels) to be a key factor influencing tourists' or customers' choice of your accommodation?
- Do you agree that the development of agritourism in Cyprus has resulted in increased environmental protection and the preservation of local architecture and culture?
- Do you think agritourism in Cyprus made a significant contribution to sustainable development?
- Which factors are driving the growth of agritourism in Cyprus?
- What steps are taken from owners of agritourism establishments to protect the environment?
- Do you believe that promoting policies and actions will help to protect and improve the local natural environment?

Table 1: Demographic Profile of Interviewees

Respondent	Gender	Age	Area
1	Female	>35	Nicosia
2	Female	>40	Limassol
3	Male	> 40	Nicosia
4	Male	> 40	Nicosia
5	Female	> 55	Larnaca
6	Male	> 55	Limassol
7	Male	> 55	Paphos

An interview guide was developed to facilitate the interviews, which were conducted in English and Greek based on participants' preferences. All interviews were recorded, transcribed verbatim in both languages, and then translated from Greek to English for analysis. The data were analyzed iteratively (Miles & Huberman, 1994), using a constant comparison method (Glaser & Strauss, 1998) to identify emerging themes and their relationships. Once theoretical saturation was achieved, the authors compared their interpretations and coding to establish a consistent coding scheme that accurately reflected the data.

In addition to primary data collection, the researchers utilized the World Wide Web as a supplementary research tool. Promotional materials provided by the Cyprus Agritourism Company and the Deputy Ministry of Tourism were also reviewed. Furthermore, the researchers examined a variety of agritourism-related studies and literature, including books, online articles, and professional publications accessed through digital libraries. Official websites of rural accommodations in Cyprus were also utilized to gather relevant information for the study.

4. Main Findings

The main purpose of this section is to analyze the collected data from all the stakeholders and investigate the current developments and future scenarios of how agritourism can become a sustainable form of tourism in the Cypriot tourism industry. What follows is a discussion of these topics based on the responses of the sample of stakeholders participating in the study. The main survey findings are summarized below as per the semi-structured interview discussion questions.

4.1 How do you Evaluate Agritourism in Cyprus?

Agritourism in Cyprus has emerged as a sustainable alternative to mass tourism, contributing to rural development, economic diversification, and environmental conservation. However, its success and challenges must be evaluated based on economic, social, and environmental dimensions. According to Respondent A, sustainable development of agritourism means development that does not deplete our natural resources. Respondents C agrees that in the case of agritourism, sustainable development means preserving natural systems' ability to provide the natural resources and ecosystem services on which the economy and society rely, while meeting human development objectives. Furthermore, the final outcome is a state of society in Agritourism in which living conditions and resource use continue to meet human requirements while protecting the integrity and stability of natural systems. Respondents D and E believe that sustainable development means providing a sustainable income to those who produce agritourism.

4.2 Through Your own Experiences can you tell me What are the Positive/Negative Economic Dimensions of the Phenomenon of Agritourism in Cyprus?

According to Respondent A, some favorable economic benefits include more revenue for businesses, more job opportunities, and a higher standard of living in the area. Respondents B and C concur on these favorable economic consequences, with Respondent C adding that revenue for the entire country is a significant economic benefit. Similarly, Respondent D believes that the sustainable growth of agritourism generates significant revenue for the agritourism industry. When asked about the negative economic repercussions, all of the interviewees responded negatively, stating that there were none.

4.3 Through Your own Experiences can you tell me What are the Positive/Negative Social Dimensions of the Phenomenon of Agritourism in Cyprus?

As indicated by Respondent A, some social positive impacts of agritourism on sustainable development include improved living and working conditions for locals, rejuvenation of small villages, and the return of younger people back to the community, while negative social impacts include increasing competition between local people and their establishments. Similarly, Respondents C and D state that there is an improvement in the villages since many agritourism establishments are being restored by young people returning to work, and the hamlet is once again full with youth and life. As a result, negative competition among enterprises emerges. Respondents E and F argue that the villages' communal growth is driven by socioeconomic opportunities, and that the sustainable development has no negative social consequences.

4.4 Through Your own Experiences can you tell me What are the Positive/Negative Environmental Dimensions of the Phenomenon of Agritourism in Cyprus?

Respondents B and C indicated that there are numerous environmental benefits, including environmental protection and the preservation of local architecture and culture, support local biodiversity, farmers adapt sustainable farming methods, environmental education, as well as the promotion of local agricultural products such as wines, bread, and handicrafts. While agritourism is generally low-impact, the construction of new accommodations, roads, and recreational areas can contribute to habitat fragmentation and soil erosion.

Respondents F and D agree that agritourism establishments are highly developed; they have begun to take better care of the environment; nevertheless, as a result of this development, some have abused the environment by cutting down trees to build new agritourism businesses. Respondents A, E, and G, claim that some environmental impacts include water consumption and waste generation. Agriculture and tourism are both water-intensive sectors. Agritourism, especially in arid areas of Cyprus, may exacerbate water scarcity issues, particularly if irrigation demands increase. The expansion of agritourism facilities (e.g., guesthouses, restaurants) can lead to increased waste production, pollution, and improper disposal of agricultural by-products.

4.5 Do you Consider the Implementation of Sustainable Development Practices and Environmental Certifications (Eco-Labels) to be a key factor Influencing Tourists' or customers' Choice of your Accommodation?

Nonetheless, all respondents indicated that sustainable development practices and eco-label certifications are increasingly becoming decisive factors in tourists' choices for agritourism accommodations. According to the respondents the key are: Growing Environmental Awareness; Market Demand for Authentic Experiences; Regulatory and Certification Influence; Competitive Advantage; Social Media & Word-of-Mouth Impact and Cost Savings & Operational Efficiency.

4.6 Do you Agree that the Development of Agritourism in Cyprus has Resulted in Increased Environmental Protection and the Preservation of Local Architecture and Culture?

All respondents agree that the development of agritourism in Cyprus has played a significant role in enhancing environmental protection and preserving local architecture and culture for the following reasons:

1. Environmental Protection
 - Sustainable Farming & Land Use
 - Conservation of Natural
 - Preservation of Biodiversity

2. Preservation of Local Architecture

- Restoration of Traditional Homes
- Use of Local Materials
- Government & EU Support

3. Cultural Preservation

- Revival of Traditional Crafts & Practices
- Sustaining Local Gastronomy
- Community Involvement

Agritourism in Cyprus has encouraged a sustainable balance between economic development and cultural and environmental conservation. It has revitalized rural areas, provided economic opportunities for local communities, and helped maintain the island's rich traditions. While challenges remain, such as ensuring responsible tourism growth, the overall impact has been positive.

4.7 Do you Think Agritourism in Cyprus Made a Significant Contribution to Sustainable Development?

All respondents agreed that agritourism in Cyprus has made a significant contribution to sustainable development by fostering environmental conservation, economic growth, and cultural preservation. Agritourism aligns well with the principles of sustainable development by balancing environmental protection, economic viability, and cultural preservation. While challenges such as seasonality, infrastructure development, and maintaining authenticity exist, it was mentioned that agritourism has contributed positively to rural sustainability in Cyprus.

4.8 Which Factors are Driving the Growth of Agritourism in Cyprus?

According to Respondent A, the key development factors for agritourism in Cyprus is the interest on cultural and culinary tourism especially in local food and wine. Cyprus is known for its rich culinary traditions, and agritourism offers visitors the chance to participate in wine tastings, olive oil production, and farm-to-table experiences. Respondent B claims that the number of agritourism establishments in Cyprus and the rich culture are the primary reasons for its growth. Similarly, Respondent D claims that to escape from mass tourism, many travelers prefer peaceful countryside stays, making agritourism an attractive alternative. Respondent C mentioned that the main reason for agritourism in Cyprus is the desire for authentic experiences. Visitors are drawn to rural Cyprus for its traditional food, hands-on farming experiences, and cultural heritage. The combination of increased demand for sustainable travel, government support, and the natural and cultural appeal of rural Cyprus is driving the expansion of agritourism. While challenges, such as seasonality and maintaining authenticity exist, the sector is expected to continue growing as more travelers seek immersive and eco-friendly experiences.

4.9 What Steps are Taken From Owners of Agritourism Establishments to Protect the Environment?

Respondent A indicated that some of the environmental measures employed in his establishments include recycling, water conservation, electrical power, and heating. These utilities are measured on a regular basis, ensuring that resource consumption in tourism enterprises is proportionate to the number of guests. In addition, establishments can develop an environmental plan. Respondent B indicated that using renewable energy sources and recycling are environmentally friendly practices. Respondent C believes that using photovoltaic systems for energy conservation, recycling, and preserving our heritage can help to safeguard the environment. Similarly, Respondents B and C stated that the owners of such businesses can safeguard the environment by using renewable energy sources, recycling, conserving energy sources such as electricity and water, and providing staff with energy-saving training.

4.10 Do you Believe That Promoting Policies and Actions Will Help to Protect and Improve the Local Natural Environment?

All of the interviewees' responses to this question imply that supporting actions and policies will significantly contribute to the protection and enhancement of the local natural environment.

5. Discussion - Conclusions

Tourism today is among the most important sectors of economic development worldwide. Especially for the case of Cyprus, it generates multiple sources of revenue and contributes to its prosperity and growth. However,

it is necessary that any benefits of economic development are properly utilized, and ensure the sustainability of tourism growth. This can be achieved by implementing alternative forms of tourism in contrast to mass tourism. It seems that agritourism can bring a lot of benefits to the tourism product of the island and can play an important role to the differentiation of its tourist product. For the successful implementation of agritourism the right capabilities and competencies (Marneros et al., 2020; Marneros et al., 2021; Papageorgiou et al., 2023; Papageorgiou et al., 2024.) are in urgent need, which can only be developed with the close collaboration of the tourism/hospitality industry, the government and the educational system.

The main findings of this study show that agritourism in Cyprus has the potential to serve as a basis for sustainable tourism by preserving rural landscapes, promoting biodiversity, and educating visitors about environmentally friendly practices. As mentioned in the interviews there is an overall recognition that agritourism, under the appropriate development and management, may foster sustainability and diversify and enrich the islands' tourism product-service mix. In this regard, the specific study recognizes that Cyprus possesses both the resources as well as the opportunities to embrace agritourism. For instance, as Kokkosis et al. (2011) argue, agritourism supports sustainability by promoting rural economies, preserving cultural heritage, and minimizing environmental impacts. On the other hand, effective management processes are required to mitigate any potential negative effects, particularly regarding water use, pollution, and infrastructure expansion. For the case of Cyprus, implementing eco-friendly policies, such as water conservation measures, waste management systems, and responsible land-use planning, can help ensure that agritourism contributes positively to both economic and sustainable environmental needs. As Marneros et al., (2023) argue, proactive environmental management—particularly through life-cycle approaches and the conservation of water resources—yields multiple benefits within the hotel industry. Notably, these benefits contribute to a mutually advantageous outcome for both businesses and society, promoting sustainability while enhancing operational efficiency and corporate responsibility.

All respondents acknowledged that sustainable development practices and eco-label certifications are playing an increasingly crucial role in tourists' decision-making when selecting agritourism accommodations. As Font et al. (2007), sustainability certifications impact consumer decision-making and enhance the marketability of accommodations. In addition, Han et al. (2010) argue that 'eco-certifications and sustainable development practices influence consumer choices in the hospitality sector'. The study highlights that agritourism in Cyprus as a form of alternative rural tourism, could act as a catalyst for a series of chronic problems, such as unplanned development, high seasonality, and contribute to equal spread of tourist development's benefits to rural communities increasing at the same manner the multiplier benefits impact for them. Moreover, findings indicated that stakeholders in rural areas of Cyprus do recognize the importance of sustainability and are willing to follow the directions of policy making for a more sustainable rural tourism future through agritourism.

In this respect, Cyprus tourism policy makers need to pay more attention to agritourism, and support both the educational institutions and the tourism industry in this direction. Further incorporation agritourism in the overall tourism strategic plan of the island would constitute a firm step towards sustainable environmental and socio-economic prosperity. Such policy measures and strategic actions could contribute to environmental sustainability in tourism. Note that especially for the case of Cyprus, agritourism offers more than just a getaway—it provides an immersive experience that reconnects travellers with nature, preserves cultural authenticity, and allows them to appreciate life's simple yet meaningful pleasures. Choosing agritourism is more than a personal experience; it is a deliberate choice to endorse sustainable practices, which are so important in today's world. By selecting locally owned and operated establishments, visitors would then actively support the economic vitality of rural communities while fostering environmentally responsible tourism.

References

- Agritourism 2025. <https://www.agritourism.com.cy/>
- Ammirato, S.; Felicetti, A.M. The Potential of Agritourism in Revitalizing Rural Communities: Some Empirical Results. In Collaborative Systems for Reindustrialization: In Proceedings of the 14th IFIPWG5.5 Working Conference on Virtual Enterprises, Dresden, Germany, 30 September 2013; Camarinha-Matos, L.M., Scherer, R.J., Eds.; Springer: Berlin/Heidelberg, Germany, 2013; Volume 408, pp. 489–497.
- Ammirato, S., Felicetti, A.M., Raso, C., Pansera, B.A. and Violi, A., 2020. Agritourism and sustainability: What we can learn from a systematic literature review. *Sustainability*, 12(22), p.9575.
- Barbieri, C. and Mahoney, E., 2009. Why is diversification an attractive farm adjustment strategy? Insights from Texas farmers and ranchers. *Journal of rural studies*, 25(1), pp.58–66.
- Barbieri, C., 2013. Assessing the sustainability of agritourism in the US: A comparison between agritourism and other farm entrepreneurial ventures. *Journal of Sustainable Tourism*, 21(2), pp.252–270.

- Boukas, N. (2019). Rural tourism and residents' well-being in Cyprus: towards a conceptualised framework of the appreciation of rural tourism for islands' sustainable development and competitiveness. *International Journal of Tourism Anthropology*, 7(1), 60-86.
- Boukas, N. (2021). Diversifying and enhancing mountainous destinations through rural tourism: the case of Kalavrita, Greece. In *Tourism marketing in Western Europe* (pp. 127-146). Wallingford UK: CABI.
- Boukas, N., & Marneros, S. (2024, March). Developing and Managing Tourism in the Post Covid-19 Era: Perceptions from Hotel Industry Professionals in Cyprus. In *International Conference on Tourism Research* (Vol. 7, No. 1, pp. 188-196).
- Bramwell, B., 2004. Mass tourism, diversification and sustainability in Southern Europe's coastal regions. *Coastal mass tourism: Diversification and sustainable development in Southern Europe*, pp.1-31.
- Ciolac, R., Iancu, T., Brad, I., Popescu, G., Marin, D. and Adamov, T., 2020. Agritourism activity—A “smart chance” for mountain rural environment's sustainability. *Sustainability*, 12(15), p.6237.
- Cystat 2025. Statistics on Cyprus tourism. <https://www.cystat.gov.cy/en/SubthemeStatistics?id=51>
- Deputy Ministry of Tourism. <https://www.gov.cy/tourism/>
- Fastforward 2023. <https://fastforward.com.cy/business/agritourism-cyprus-year-round-destination>
- Font, X., & Epler Wood, M., 2007. Sustainable tourism certification marketing and its contribution to SME market access. *Scandinavian Journal of Hospitality and Tourism*, 7(2), 218–233. <https://doi.org/10.1080/15022250701300219>
- Garau, C., 2015. Perspectives on cultural and sustainable rural tourism in a smart region: The case study of Marmilla in Sardinia (Italy). *Sustainability*, 7(6), pp.6412-6434.
- Glaser, B.G. and Strauss, A.L., 1998. *Grounded theory. Strategien qualitativer Forschung*. Bern: Huber, 4.
- Grillini, G., Streifeneder, T., Stotten, R., Schermer, M. and Fischer, C., 2025. How tourists change farms: The impact of agritourism on organic farming adoption and local community interaction in the Tyrol-Trentino mountain region. *Journal of Rural Studies*, 114, p.103531.
- Han, H., Hsu, L.-T. J., & Sheu, C., 2010. Application of the Theory of Planned Behavior to green hotel choice: Testing the effect of environmental friendly activities. *Tourism Management*, 31(3), 325–334. <https://doi.org/10.1016/j.tourman.2009.03.013>
- G. and Ishikawa, M., 2009. Eco-efficiency guiding micro-level actions towards sustainability: Ten basic steps for analysis. *Ecological Economics*, 68(6), pp.1687-1700.
- Hjalager, A.M., 1996. Agricultural diversification into tourism: Evidence of a European Community development programme. *Tourism management*, 17(2), pp.103-111.
- Kataya, A., 2021. The impact of rural tourism on the development of regional communities. *Journal of Eastern Europe Research in Business and Economics*, 2021(10).
- Kizos, T. and Iosifides, T., 2007. The contradictions of agritourism development in Greece: evidence from three case studies. *South European Society & Politics*, 12(1), pp.59-77.
- Kokkosis, C., Tsartas, P. & Grimba, E. 2011. *Special and Alternative Forms of Tourism*. Athens: Review publications.
- Kokkosis, C., Tsartas, P., & Grimba, E. 2011. *Sustainable Tourism Development and the Environment*. Kritiki Publications.
- Koutra, C. and Karyopoulou, S., 2013. Cyprus' image—a sun and sea destination—as a detrimental factor to seasonal fluctuations. Exploration into motivational factors for holidaying in Cyprus. *Journal of Travel & Tourism Marketing*, 30(7), pp.700-714.
- Marneros, S., Papageorgiou, G. and Efstathiades, A., 2020. Identifying key success competencies for the hospitality industry: The perspectives of professionals. *Journal of Teaching in Travel & Tourism*, 20(4), pp.237-261.
- Marneros, S., Papageorgiou, G. and Efstathiades, A., 2021. Examining the core competencies for success in the hotel industry: The case of Cyprus. *Journal of Hospitality, Leisure, Sport & Tourism Education*, 28, p.100303.
- Marneros, S., Papageorgiou, G. and Efstathiades, A., 2023, May. Evaluating Strategies for Sustainability and Business Performance in the Hotel Industry of Cyprus. In *International Conference on Tourism Research* (Vol. 6, No. 1, pp. 177-185).
- Miles, M.B. and Huberman, A.M., 1994. *Qualitative data analysis: An expanded sourcebook*. sage.
- Paniccia, P.M. and Baiocco, S., 2020. Interpreting sustainable agritourism through co-evolution of social organizations. *Journal of Sustainable Tourism*, 29(1), pp.87-105.
- Papageorgiou, A., & Lytras, P. (2015). The efficacy of alternative tourism development to overcome current crisis: an exploration of the views of the stakeholders of the prefecture of Korinthia. *tourismos*, 10(2), 97-107.
- Papageorgiou, G., Marneros, S. and Efstathiades, A., 2023, September. Sustainability Management, Technological Innovation and Corporate Social Responsibility for Social Media Small to Medium-Sized Enterprises (SMEs). In *European Conference on Innovation and Entrepreneurship* (Vol. 1, pp. 571-R24). Academic Conferences International Limited.
- Papageorgiou, G., Marneros, S. and Efstathiades, A., 2024. Predicting career success in the hospitality industry of Cyprus: a competency-based approach. *Journal of Teaching in Travel & Tourism*, pp.1-33.
- Phillip, S., Hunter, C. and Blackstock, K., 2010. A typology for defining agritourism. *Tourism management*, 31(6), pp.754-758.
- Popescu, C.A., Iancu, T., Popescu, G., Adamov, T. and Ciolac, R., 2023. The impact of agritourism activity on the rural environment: findings from an authentic agritourist area—Bukovina, Romania. *Sustainability*, 15(13), p.10294.
- Santeramo, F.G. and Barbieri, C., 2017. On the demand for agritourism: A cursory review of methodologies and practice. *Tourism planning & development*, 14(1), pp.139-148.
- Smith, V.L. and Eadington, W.R. eds., 1997. *Tourism alternatives: Potentials and problems in the development of tourism*. University of Pennsylvania press.

- Songkhla, T.N. and Somboonsuke, B., 2013. Interactions between agro-tourism and Local Agricultural Resources Management: a case study of agro-tourism destinations in Chang Klang District, Southern Thailand.
- Sonnino, R., 2004. For a 'piece of bread'? Interpreting sustainable development through agritourism in Southern Tuscany. *Sociologia ruralis*, 44(3), pp.285-300.
- Spanaki, M.Z., 2018. Alternative forms of tourism: The dynamics of agritourism in a changing era.
- Tew, C. and Barbieri, C., 2012. The perceived benefits of agritourism: The provider's perspective. *Tourism management*, 33(1), pp.215-224.
- Tregua, M., D'Auria, A., & Marano-Marcolini, C. (2018). Oleotourism: Local Actors for Local Tourism Development. *Sustainability*, 10(5), 1492. <https://doi.org/10.3390/su10051492>
- Willaddara, H.W.B.M. and Ranaweera, W.G.P.M., 2024. Exploring the Effects of Agro Tourism Initiatives on the Development of Rural Economy: Special Reference to Farming Cultivations in Nuwara Eliya, Sri Lanka. *Journal of Multidisciplinary Research*, 3(1-2024).
- Weaver, D., 2020. Advanced introduction to sustainable tourism.

Circular Economy in the Restaurant Sector: Do Practices Go Hand in Hand?

António Melo¹, Daniel Azevedo¹, Susana Silva², Goretti Silva³, Ana Figueiredo¹ and Carla Melo¹

¹Escola Superior de Hotelaria e Turismo - Politécnico do Porto, Portugal - CiTUR - Centre for Tourism Research, Development and Innovation

²CiTUR, CEOS.PP, Escola Superior de Hotelaria e Turismo - Politécnico do Porto, Portugal

³Escola Superior de Tecnologia e Gestão - Politécnico de Viana do Castelo, Portugal - CiTUR - Centre for Tourism Research, Development and Innovation

antonio.melo@esht.ipp.pt

dazevedo@esht.ipp.pt

susanasilva@esht.ipp.pt

goretti@estg.ipvc.pt

41190070@esht.ipp.pt

carlamelo@esht.ipp.pt

Abstract: The growing importance of sustainability has led the restaurant sector to explore circular economy practices to reduce waste and improve resource efficiency. This ongoing study examines the correlation between the adoption of one circular economy practice and the implementation of another within the restaurant sector. The study aims to identify specific practices that are related and assess the extent of these associations. A quantitative methodology was used with a survey that evaluated the adoption of 22 circular economy practices. Data collection was conducted between June and September 2023, resulting in 304 responses. Data were analyzed using SPSS version 28.0 with factor analysis employed to identify patterns of practice adoption. The results reveal that while some practices are indeed implemented together, such as energy-efficient equipment being strongly associated with monitoring energy consumption, many other practices did not exhibit significant correlations. For instance, waste reduction initiatives and water-saving measures often appeared isolated, without a consistent implementation linked to other practices. This suggests that restaurants may focus on aspects of circularity while neglecting others, indicating a fragmented rather than integrated approach. The findings point to key areas, such as waste management and energy efficiency, where more strategic interventions could encourage a holistic adoption of circular economy principles. These patterns underscore the need for further investigation into barriers that prevent cohesive practice implementation and opportunities for aligning efforts across multiple sustainability dimensions.

Keywords: Circular economy, Restaurant, Waste reduction, Water-saving

1. Introduction

In the last few years, sustainability has become a growing priority in the restaurant sector, with many establishments adopting circular economy (CE) practices to reduce waste and improve resource efficiency. This shift mirrors the increasing attention CE has garnered in research, where it is recognized as a strategy to address widespread socio-environmental issues, such as food waste, and to facilitate a sustainable transition within industries (Rabiu and Jaeger-Erben, 2022). Thus, the shift towards a sustainable and CE has gained considerable focus in recent years, especially within the food industry (Rabbi and Amin, 2024). Restaurants, and especially hotels, generate significant amounts of waste, including food waste, energy consumption, water usage (Rodríguez *et al.*, 2012), wastewater, along with hazardous materials and chemicals (Jones *et al.*, 2014).

CE practices can be adopted in hospitality settings at both the organizational and customer levels. Consequently, the implementation of these practices has been associated with promoting sustainable food production and consumption, while also encouraging sustainable behaviours (Klug and Niemand, 2021).

The CE model, which aims to extend the life cycle of products and minimize waste (European Parliament, 2023), has gained prominence as a solution to the environmental impacts of the food industry. However, the implementation of these practices in the sector is still little explored, especially about the interrelationship between different circular practices. Consequently, there is an urgent need for focused research exploring the application of circular practices to address sustainability issues (Geissdoerfer *et al.*, 2017)

This study aims to investigate the correlation between the adoption of different circular economy practices in restaurants, identifying which are often implemented together and which areas still have isolated approaches. It also contributes to the existing literature, by highlighting the areas of the restaurant sector that need strategic

interventions to promote a more holistic adoption of the circular economy and by providing insights into the factors that can facilitate the implementation of sustainable practices in a more integrated way.

This paper is structured into five sections: an introduction, a theoretical framework, methodology, presentation and discussion of results, and conclusions.

2. Theoretical Framework

A holistic approach is essential to address the challenges of building a sustainable future (Bocken *et al.*, 2014). Key elements of a pathway to a sustainable economy (adapted from Jackson, 2009) might include, among others: a system that promotes the reduction of consumption, or imposes personal and institutional limits or quotas on energy, goods, water, etc.; a closed-loop system where waste is not allowed to enter the environment, prioritizing reuse, repair, and remanufacturing over recycling; and a system that focuses on delivering functionality and experiences, rather than emphasizing product ownership.

The intricate interrelationship between the circular economy and the three critical resources - water, energy, and food - lies in the fact that food systems are considered among the most polluting, significantly contributing to greenhouse gas emissions and environmental degradation (Kamińska *et al.*, 2021). The transition to a circular economy presents a unique opportunity to foster synergies for adopting water reuse technologies, renewable energy sources, and sustainable food systems as alternatives to traditional approaches for ensuring water, energy, and food security (Naidoo *et al.*, 2021). According to these authors, adopting the principles of the circular economy in the field of water and energy is fundamental, through sanitation, renewable and clean energies, and the reuse of water. The strategy for water circularity should begin at the top of the waste hierarchy, focusing on water use reduction, and extend to the recovery of energy and materials from wastewater (Samberger, 2022). This author points out that significant energy savings can be achieved in the water sector by fully exploiting the available energy efficiency and recovery opportunities: thermal energy from wastewater can be harnessed for space heating and cooling. Malheiro *et al.* (2020) have argued that achieving cost reductions in this context can be accomplished by lowering water and energy consumption, in addition to implementing effective management systems to control these resources.

The Circularity Gap Report (Circle Economy, 2024) mentions some practices that should be implemented in the food system, namely: prioritizing satiating and healthy foods with a lower environmental impact, prioritizing the production and consumption of local, seasonal and organic products, minimizing food loss and recovering waste by following the food waste hierarchy throughout the supply chain and, at consumer level, through better transport and storage management, more refrigeration and intelligent planning and technology at consumer and food service level.

According to the Madeira Circular website, the CE practices to be implemented in the restaurant sector are: establishing a commitment against food waste by preserving food properly, working with local suppliers, making the most of food, adjusting portions, making customers aware of food waste, establishing partnerships with mobile applications to prevent food waste, establishing partnerships with social institutions and recovering organic waste; be proactive in reducing disposable packaging by eliminating disposable packaging as much as possible, reducing use from suppliers to customers and eliminating the use of plastic and single-use crockery; knowing the technologies that can support this transition and whenever possible, reuse, repair, renovate, donate, sell second-hand or recycle.

According to the AHRESP's (2021) *Guide to Good Practices for Circular and Sustainable Catering*, various sustainable practices are recommended across multiple components of restaurant operations. In terms of food and drink, some examples include creating seasonal menus, using a wide variety of plant-based ingredients, buying local produce, and adjusting portion sizes to reduce food waste. Regarding energy, the guide emphasizes practices such as minimizing the use of gas, selecting energy suppliers with environmental certification, monitoring energy consumption, and regularly maintaining equipment to ensure efficiency. In the area of water, the guide suggests using tap water where possible and avoiding washing dishes under running water, which can significantly reduce water usage. For packaging, it recommends using reusable containers and promoting the recycling of packaging provided at the establishment. As for infrastructure management, some of the suggested practices include investing in the durability of new equipment, recycling equipment that is no longer reusable or repairable, and opting for second-hand or reconditioned kitchen equipment. When it comes to consumables, the guide advises using cleaning products that carry the EcoLabel, opting for refillable products, and transitioning to electronic invoices to reduce paper consumption. With respect to transportation and suppliers, some recommended practices include sourcing fresh, seasonal products from local suppliers and using electric vehicles

for deliveries. Finally, in terms of waste management, the guide suggests practices such as recycling and composting food waste, which contribute to minimizing environmental impact.

3. Methodology

This study aims to identify specific practices in the restaurant sector that are related to each other and to assess the extent of these associations, contributing to a better understanding of the implementation of CE practices. A quantitative approach was adopted, using a survey as the data collection tool. This approach allowed for a systematic and objective analysis of the practices implemented by the participants. The population of this study consisted of restaurants located in four regions of Portugal: Coimbra, Alto Minho, Cávado and Ave, and the Metropolitan Area of Porto. The selection of participants was based on criteria of accessibility and availability to take part in the study, resulting in a sample of 304 valid responses and the data was collected between June and September 2023. The data was analysed using SPSS software version 28.0, which enabled a factor analysis to be carried out, identifying latent factors responsible for the association between the variables. All ethical procedures were strictly observed, and the participants were informed about the objectives of the study and the use of the data.

4. Results

This chapter presents the results of the study on the association between circular economy practices implemented in restaurants and other sustainable practices. The analysis was based on a correlation matrix, which reveals the relationships between various practices, such as food utilisation, waste reduction, energy efficiency, among others.

There is a strong correlation between utilisation and food management practices, namely: valuing vegetarian/vegan options ($r = 0.473$), care in plating and adjusting the portion served to the customer ($r = 0.461$), conservation and regeneration of excess production for later use ($r = 0.528$). These results suggest that practices focused on reducing waste and fully utilising food tend to be adopted simultaneously.

The purchase of local, seasonal and preferably bulk products has a strong correlation with preference for environmentally responsible suppliers: preference for suppliers with more environmentally responsible production methods ($r = 0.640$), preference for suppliers with more environmentally responsible distribution ($r = 0.599$). This suggests that sustainability practices are closely linked to the choice of suppliers that follow responsible methods.

Waste separation practices by category and quantification/valorisation of the waste generated are strongly correlated ($r = 0.566$ and $r = 0.474$, respectively), which implies that organisations that implement effective waste management often also quantify and value this waste.

There is a significant correlation between monitoring practices and optimisation of energy and water use, such as: monitoring meters and energy and water bills ($r = 0.666$), adjusting thermostats and optimising energy efficiency ($r = 0.738$). This reflects a tendency for energy and resource efficiency practices (such as water and energy) to be implemented together.

It can also be seen that there are moderate to strong correlations between sustainable product purchasing practices, such as: purchasing used or sustainable equipment and utensils and replacing equipment with more energy-efficient models ($r = 0.671$), preventive monitoring of equipment and use of energy-efficient equipment ($r = 0.584$).

As for weaker relationships, which suggest that the application of certain practices happens in isolation, the practice of sending surplus production to social support institutions showed weaker correlations with other practices, which suggests that this may be an isolated practice. The provision of filtered tap water in the space also showed weak correlations with other practices, suggesting that it is not strongly associated with other environmental practices in a consistent way.

5. Discussion and Conclusions

The literature review emphasizes the importance of reducing consumption and waste as a part of a CE (Bocken et al., 2014; Jackson, 2009). The results from this research show a strong correlation between practices that aim to utilize food more efficiently and reduce waste, such as adjusting portion sizes, valuing vegetarian/vegan options, and regenerating excess production for later use. Specifically, the high correlations suggest that these practices are being adopted together, reflecting a holistic approach to waste reduction and food management,

as suggested by Bocken et al. (2014). This aligns with the literature's emphasis on minimizing waste and optimizing resource use in a closed-loop system (Kamińska et al., 2021).

Practices related to food waste, such as utilising all parts of food and regenerating excess production, tend to be correlated with conscious use of resources, which suggests an integrated approach to sustainability.

Energy and water management is another axis with strong correlations, indicating that monitoring and optimisation practices are often adopted in a coordinated manner, supporting the idea that resource efficiency is a primary component of sustainability in the sector. These results reflect the principles put forth by Samberger (2022) and Malheiro et al. (2020), who emphasize the importance of energy and water efficiency as central to the CE.

In summary, CE practices, especially those related to food recovery and efficient resource management, are often associated with a range of other sustainable practices within the organizations analysed. The implementation of one practice, such as optimizing food utilization or energy efficiency, appears to facilitate the adoption of other related practices, creating a virtuous cycle of sustainability. This observation resonates with the literature's emphasis on an interconnected system that fosters sustainable practices across multiple dimensions (e.g., food, energy, water), as outlined by Naidoo et al. (2021) and Circle Economy (2024).

References

- AHRESP & Turismo de Portugal (2021) *Guia de boas práticas para uma restauração circular e sustentável*. Lisbon: Turismo de Portugal. Available at: <https://business.turismodeportugal.pt/SiteCollectionDocuments/sustentabilidade/guia-boas-praticas-para-restauracao-circular-e-sustentavel.pdf>
- Bocken, N., Short, S., Rana, P., and Evans, S. (2014) 'A literature and practice review to develop sustainable business model archetypes'. *Journal of Cleaner Production*, 65, pp. 42 – 56. Available at: <https://doi.org/10.1016/j.jclepro.2013.11.039>
- Circle Economy (2024) *The Circularity Gap Report 2024*. Amsterdam: Circle Economy. Available at: <https://www.circularity-gap.world>
- European Parliament (2023) *Circular economy: definition, importance and benefits*. Available at: <https://www.europarl.europa.eu/topics/en/article/20151201STO05603/circular-economy-definition-importance-and-benefits> (Accessed: 7 November 2024).
- Geissdoerfer, M., Savaget, P., Bocken, N., and Hultink, E. (2017) 'The Circular Economy – A new sustainability paradigm?'. *Journal of Cleaner Production*, 143, pp. 757 – 768. Available at <https://doi.org/10.1016/j.jclepro.2016.12.048>
- Jackson, T. (2009) *Prosperity without Growth: Economics for a Finite Planet*. London: Earthscan.
- Jones, P., Hiller, D., and Comfort, D. (2014) 'Sustainability in the global hotel industry'. *International Journal of Contemporary Hospitality Management*, 26(1), pp. 5 -17. Available at: <https://doi.org/10.1108/IJCHM-10-2012-0180>
- Kamińska, A., Bajan, B., Pawłowski, K., Genstwa, N., and Zmyślona, J. (2021) 'Greenhouse gas emissions intensity of food production systems and its determinants'. *PLoS ONE*, 16(4) :e0250995. Available at: DOI: 10.1371/journal.pone.0250995
- Klug, K., and Niemand, T. (2021) 'The lifestyle of sustainability: Testing a behavioral measure of precycling'. *Journal of Cleaner Production*, 297, 126699. Available at: <https://doi.org/10.1016/j.jclepro.2021.126699>
- Madeira Circular (n.d.) *Fechar o Ciclo e Nas Empresas*. Available at: <https://madeiracircular.madeira.gov.pt>
- Malheiro, M., Sousa, B., Liberato, D., and Liberato, P. (2020) 'Sustainability in Tourism And Hospitality: Trends And Challenges'. Available at: <https://www.researchgate.net>
- Naidoo, D., Nhamo, L., Lottering, S., Mpandeli, S., Liphadzi, S., Modi, A., Trois, C., and Mabhaudhi, T. (2021) 'Transitional Pathways towards Achieving a Circular Economy in the Water, Energy and Food Sectors', *Sustainability*, 13(17), 9978. Available at: <https://doi.org/10.3390/su13179978>
- Rabbi, M., and Amin, M. (2024) 'Circular economy and sustainable practices in the food industry: A comprehensive bibliometric analysis', *Cleaner and Responsible Consumption*, 14, 100206. Available at <https://doi.org/10.1016/j.clrc.2024.100206>
- Rabiau, M., and Jaeger-Erben, M. (2022) 'Appropriation and routinisation of circular consumer practices: A review of current knowledge in the circular economy literature', *Cleaner and Responsible Consumption*, 7, 100081. Available at: <https://doi.org/10.1016/j.clrc.2022.100081>
- Rodríguez, J., Almeida, M., Celemin, M., and Rubio, L. (2012) 'Use of different sustainability management systems in the hospitality industry. The case of Spanish hotels', *Journal of Cleaner Production*, 22(1), pp. 76 – 84. Available at: <https://doi.org/10.1016/j.jclepro.2011.09.024>
- Samberger, C. (2022) 'The role of water circularity in the food-water-energy nexus and climate change mitigation'. *Energy Nexus*, 6, 100061. Available at: <https://doi.org/10.1016/j.nexus.2022.100061>

Industrial Tourism in Small and Medium-Sized Industrial Enterprises: Challenges and Opportunities

Zulmira Montenegro¹, Jorge Marques¹ and Cristina Sousa²

¹Universidade Portucalense Infante D. Henrique, Porto, Portugal

²Iscte – Instituto Universitário de Lisboa, Lisboa, Portugal

zulmiramontenegro@gmail.com

jorgem@upt.pt

cristina.sousa@iscte-iul.pt

Abstract: This paper explores Industrial Tourism (IT) within Portuguese small and medium-sized enterprises (SMEs). It aims to identify the main challenges and opportunities of this tourism product and offers suggestions to enhance the sustainability and competitiveness of these organizations. This research seeks to understand the perspective of active industrial enterprises, or the "living industry," and how this type of tourism can enhance their sustainability and competitiveness. Primary data was collected through a questionnaire administered to 186 SMEs in Portugal. The findings show that most Portuguese SMEs do not engage in IT, mainly due to logistical, security, and strategic concerns. However, the study concludes that IT offers opportunities for SMEs to improve their marketing approaches, societal relationships, business strategies, and human resources.

Keywords: Industrial tourism (IT), Small and medium-sized enterprises (SME), Challenges, Opportunities

1. Introduction

IT is considered a niche market alternative to mass tourism. It is based on industrial heritage (Pardo Abad, 2017), whether in deactivated production facilities (e.g., company museums), in operational production units, or even ongoing projects of industrial facilities (Montenegro et al., 2022) which, due to their specificity, arouse interest due to their educational and tourist attraction (Moral-Moral & Fernandez-Alles, 2019). It includes all types of tourist activities whose primary purpose is related to material and immaterial industrial knowledge. However, the existing literature on this topic still needs to be explored, especially regarding the approach from the perspective of industrial small and medium enterprises (SMEs) (Montenegro & Sousa, 2021). According to Zhang et al. (2020), the research on IT addresses mainly topics related to heritage and the construction of industrial heritage communities, the exploitation of tourism, the protection of industrial heritage, and the use of new technologies, which reinforces the importance of developing more studies in this field. The aim is to present empirical results in the context of industrial enterprises when facing the potential of IT and how the two areas of such different economic sectors - industry and services - can be bridged. Thus, this work has two main objectives: 1) to identify the main challenges of developing IT and integrate this product into industrial SME business strategies, and 2) to point out the main strategic opportunities this tourism product takes to SMEs.

This research makes three main contributions: contributes to a better conceptual delimitation and contextualization from the perspective of industrial SMEs; contributes to understand better the reality of industrial SMEs and the main challenges associated with implementing IT; and identify the primary potentialities and contributions that IT can bring to enterprises and point out strategic guidelines for implementing this product.

2. Exploring Industrial Tourism as a Business Strategy for SMEs

The literature on strategic management has generated different theories over the last 40 years. The industrial organization strategy model, developed by Porter (1985), was pursued in the 1990s with the resource-based view theory (Grant, 1991), which later evolved into competence-based competition and into the dynamic capabilities view (Teece et al., 1997). According to Porter (1985), winning business strategies allow companies to gain a competitive advantage in the market. Crema et al. (2014) identify three main strategies to gain a competitive advantage: i) diversification, ii) cost leadership, and iii) innovation (differentiation).

In the 1960s and early 1970s, diversification was popular among industry and academia (Lichtenthaler, 2005). After many companies failed to diversify in the following years, diversification was considered a destroying value (Lichtenthaler, 2005). Nowadays, business diversification is a strategy that allows companies to expand their core business into other activities (Chan et al., 2019). Since IT is not the main focus of industrial companies, it is essential to understand how this tourism product can be framed into business diversification and innovation, thus creating added value for SMEs.

Diversification strategies can be critical for companies, allowing them to readjust to a constantly changing world as a safety device, reducing risk, and promoting the search for profitable opportunities (Couto et al., 2021). It allows for strategic slack as a reserve of knowledge (Orlando et al., 2018), enabling them to expand into new market segments or to invest in a different business area (Crema et al., 2014), allowing the creation of new product development strategies (Danjou & Koehler, 2007). In the context of globalization, market consolidation, and economic instability, companies must look for new ways to strengthen their market position, reduce business risks, and increase profits (Lee & Nguyen, 2021). Forming and implementing the business diversification strategy partially solves these problems (Li et al., 2021).

There is an academic debate on the impact of diversification on innovation. Depending on several factors, diversification can impact organizations differently and positively or negatively affect innovation. According to Dang et al. (2016), diversification is positive for companies' products and innovation. There is also evidence indicating that a company's diversification strategy can adversely affect research and development (R&D) intensity, yet still maintain a positive relationship with innovation (Dang et al., 2016). According to Orlando et al. (2018), the diversification strategy is both a factor of sunk costs and strategic slack, with strategic slack being a valuable reserve of knowledge that can promote innovation.

Diversification can be an enabler of competitive advantages; however, concentrating on core capabilities rather than diversifying can also be necessary, suggesting a careful analysis of the benefits and risks of the diversification decision (Valtonen et al., 2015).

The interaction between formal and informal institutional environments also influences the choice of a diversification strategy, with the formal environment inhibiting it (Zuo et al., 2023). According to Crema et al. (2014), companies that choose a diversification strategy will most likely use open innovation management practices. The scarcity of resources and skills that often characterizes SMEs frequently serves as a barrier to initiating innovative pathways. Particularly in the case of IT, over the years, several possible objectives have been identified to be achieved through IT, namely the presentation of the quality of its products (McBoyle, 1996); promotional opportunity (Otgaar, 2012; Chow et al., 2017); building relationships with customers (Endo & Kurata, 2015; Chow et al., 2017); increasing brand loyalty (Chow et al., 2017); companies' recruitment strategies (Nielsen, 2012); showing environmental integrity, green attitude (McBoyle, 1996; Rudd & Davis, 1998); developing a differentiation strategy (Endo & Kurata, 2015); increasing profits (Rudd & Davis, 1998); gaining a larger market share (Rudd & Davis, 1998), among others.

According to Duijm & Van Beveren (2022), the relationship between diversification and performance is not direct. It is influenced by the size of the company, concluding that the performance of smaller companies is significantly affected by diversification.

Another critical point is top management's involvement in corporate diversification dynamics. Silalahi & Bimo (2021), when analysing the relationship between diversification and the influence of CEOs, noted that although diversification tends to lower company performance, a higher commitment of the Chief Executive Officer (CEO) tends to eliminate that negative influence (Silalahi & Bimo, 2021). Accordingly, Montenegro & Sousa (2021) stated that implementing a diversification strategy in industrial companies through IT depends on the organizational strategy and culture, reinforcing the importance of the involvement of top management.

In this context, IT emerges as an innovative product for SMEs that could contribute to the strategic differentiation of industrial companies. It does mean the need to think strategically and integrate this product into the company's structure to determine how it can be implemented.

3. Method

3.1 Sample and Data Collection

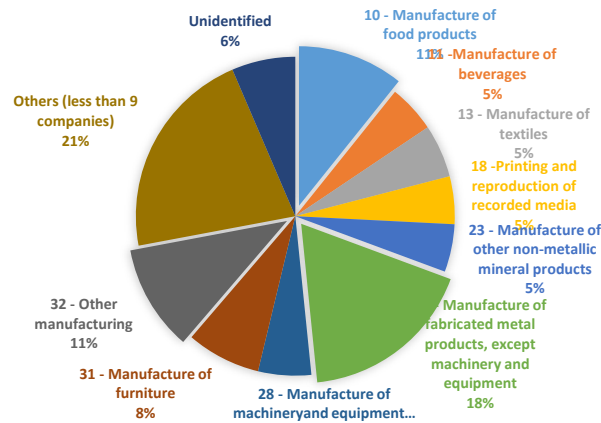
The data was gathered using an online questionnaire distributed via email to all industrial companies in Portugal between May 24 and June 30, 2023, according to the list presented in the SABI (System of Analysis of Iberian Balance Sheets) database, version 134. The sample included all companies with:

- NACE (Statistical Classification of Economic Activities in the European Community) (Rev.2) division from 10 to 32 (Section 3 –Manufacturing);
- E-mail address;
- State: Active;
- Number of employees between 1 and 249 (last year available);

- Net annual profit not superior to €43,000,000 (last year available)

Although there are industrial companies in other NACE sections, section 3 reflects a huge industrial diversity, which is considered fundamental to enriching our study.

Participants were duly informed about the study's objectives and provided informed consent for the utilization of their data. Their participation was voluntary and anonymous. One hundred eighty-six (186) valid responses were obtained. The breakdown of the participants by industry (NACE division) and location in the Portuguese territory (district) are presented in figures 12 and 13.



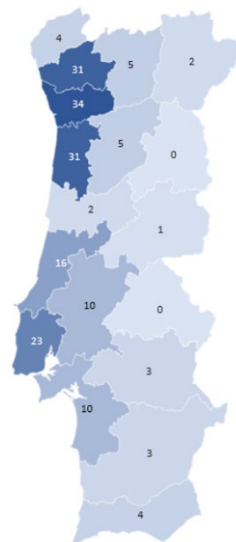
Source: Own elaboration

Figure 1: Industries of the companies in the sample

The industries most prominently represented in the sample (as illustrated in Figure 1) include the manufacturing of metal products, excluding machinery and equipment (NACE 25), food industries (NACE 10), and other manufacturing sectors (NACE 32).

Most of the participating companies are situated in the northern and central coastal districts of the country (figure 2), particularly in Aveiro, Braga, Leiria, Lisbon, and Porto. This is in line with the distribution of the manufacturing industry in Portugal (INE, 2021).

It was possible to have the participation of a company from the Azores, from the district of Ponta Delgada, and one company did not identify its location.



Source: Own elaboration

Figure 2: Location of the companies in the sample

The questionnaire contained five sections, each made up of questions that measured the variables used in this study, namely:

Section 1: questions on the general characteristics of the company, in particular the municipality of the headquarters and the main NACE division in which the company operates.

Section 2: a question on whether the company offers activities related to IT. (Yes or No).

Section 3 (for companies not offering activities in the field of IT): questions about the main reasons for not implementing tourism in their industrial facilities.

Section 4 (for companies offering activities in the field of IT): questions about the way IT is implemented, namely on the following topics: the date IT began and the characteristics of the visits: type of visitors, timetable, type of experiences offered, price and the visitors' country.

Section 5 (for companies offering activities in the field of IT): questions on the advantages and disadvantages of IT for the company, whether they have a factory store, whether they have seen a return on this investment, and what support and partnerships they have established in the field of IT.

3.2 Measures

This study adopts a quantitative approach, complemented by a descriptive statistical analysis of the data collected (SPSSv.25).

4. Results

A total of 186 industrial enterprises participated voluntarily, 169 (90.86%) without IT and 17 (9.14%) with IT. To better analyze the data collected, the results are presented in two sub-sections: companies with IT and companies without IT.

Throughout the text, the results found are also categorized to present the research findings in a more enriching and systematized way. This categorization considers organizational behavior, respecting the general organizational structure of companies (Robbins et al., 2010). Functional categorization is one of the most popular ways of grouping business activities, but there are other ways, such as by product, by customer, by region, among others. As a matter of organization and the authors' choice, the article adopts functional categorization, specifying different areas such as Strategy, Logistics, Accessibility and Security, among others.

4.1 Portuguese SMEs with IT

In this section, we present how Portuguese industrial SMEs are integrating IT into their business strategy.

The primary spheres of activity among companies that have diversified into IT are notably varied, encompassing domains such as cutlery, metalwork, bicycle manufacturing, wine, quarries, wood flooring, ceramics, and cheese making. Most of them (53%) have factory outlets. Of the IT companies that promote IT, ten chose to reveal their identity, which led us to consult some information on official websites, where we found that only one company advertises IT through this medium.

On average, these companies have received tourists for 15 years, ranging from 1 to 54 years. Demand for IT varies throughout the year, with the months of March, May, June, and July seeing the most significant demand. The months with the lowest demand are January and February.

The activities proposed by the companies are different. Around 76% of the companies offer guided tours of their facilities, which is the most common way companies use to boost IT. This is followed by training sessions and workshops (18% and 11% of companies, respectively). Other types of activities, mentioned less frequently, include free visits, visits to local institutions, wine tastings and access to museums, and points of sale. In most of companies (76.5%), visits are free to visitors.

Around 65% of the companies say that most visitors are Portuguese, while the remaining 35% come from other countries, such as France, Germany, USA, Brazil, UK and Spain, among others.

The analysis of the answers of companies involved in IT enables us to understand what they value most about this tourism product. Table 1 shows the advantages that are more often mentioned by IT companies.

Table 1: Main advantages of IT

Advantages	No. of companies	%
Building relationships with customers	15	88,24%
Presenting the quality of your products	14	82,35%
Strengthen reputation	11	64,71%
Establish trust and understanding in the supply chain	9	52,94%
Promotional opportunity for brands, products, or regions	9	52,94%
Educate and motivate the public on an issue	9	52,94%
Building a sustainable relationship with society	9	52,94%
Increase brand loyalty	8	47,06%
Show environmental integrity, green attitude	7	41,18%
Develop a differentiation strategy	7	41,18%
Increase competitiveness	5	29,41%
Gain a larger market share	4	23,53%
Motivating the company's employees	4	23,53%
Recruitment strategy	3	17,65%

Source: Own elaboration

It is worth noting that almost all companies cite building relationships with customers and presenting the quality of their products as the main advantages of IT. This is followed by other advantages, also in marketing, reputation, trust and promotional opportunities, which are also added benefits in terms of relations with society (52.94%).

The additional benefits highlighted by the companies pertain to the potential for differentiation and heightened competitiveness, advantages that we perceive to be intertwined with the business strategy itself. Moreover, within the realm of human resources, they serve as a strategic approach for both recruitment and employee motivation.

The next table (table 2) shows the disadvantages that are more often mentioned by IT companies.

Table 2: Main disadvantages of IT

Disadvantages	No. of companies	%
Threat of industrial espionage	6	35,29%
Source of "noise" and "disruption" to industrial daily life	5	29,41%
Development costs	3	17,65%
Security risks	2	11,76%
Threat of theft	1	5,88%
Public scrutiny	1	5,88%

Source: Own elaboration

The primary drawback of IT lies in the risk of industrial espionage (35%). Other reasons cited by companies as disadvantages of implementing IT include being a source of "noise" and "disruption" to everyday industrial operations (29%), incurred development costs, security risks, and the potential threat of theft.

When asked about partnerships with external entities, the companies differed, with around 53% saying they had no partnerships in the field of IT. The companies that say they do have partnerships are with town halls, tourism associations, universities, parish councils, government bodies, schools, travel agencies, hotels, and companies in their supply chain.

Around 41% of the companies said that they had obtained a financial return on their investment in diversification through IT. Around 53% of the companies have a factory store where visitors can buy products at the end of their visit. There is a more significant number of companies with factory outlets that have obtained a financial return on their investment compared to companies without factory outlets.

Some suggestions were made, to be specific: improving promotion; creating partnerships; IT is an investment with a return; it strengthens relationships with clients and suppliers; national pride - through IT is possible to show the world that products produced in Portugal have quality, design and innovation; creating hybrid spaces (in the event that it is difficult to access the production space): museum, store, exhibition space.

4.2 Portuguese SMEs without Industrial Tourism

As previously stated, approximately 90% of the surveyed companies lack tailored initiatives for IT. The reasons for this lack of engagement are varied and are outlined in table 3. The reasons provided by various companies to justify the absence of IT on their premises are primarily related to internal factors within the company's operations (87 %), including corporate strategy and culture, costs, production processes, security, and logistics. External factors (13%) include issues such as the risk of theft and industrial espionage, difficulties in accessing the facilities, and the potential for reduced and sporadic demand were also mentioned. The findings align with reasons presented by various authors: security (Lukas, 1999); costs and industrial espionage (Mitchell & Mitchell, 2001; Otgaar, 2012; Botella, 2018); attractiveness of the production process (Otgaar, 2012); corporate strategy and culture not aligned with IT (Montenegro & Sousa, 2021).

Table 3: Reasons why SMEs don't promote IT

Reasons why SMEs don't have Industrial Tourism	% companies
Industrial Tourism is not aligned with the company's strategy and culture	62,13%
Unattractive production process	20,12%
Security risks	18,93%
Threat of industrial espionage	8,88%
Source of "noise" and "disturbance" to daily industrial activity	7,69%
Difficulties in accessing facilities	3,55%
Threat of theft	2,37%
Public scrutiny	1,78%
Development costs	1,78%
Not considered/equalized so far	1,78%
Scheduled and sporadic visits	0,59%

Source: Own elaboration

Based on functional categorization, Logistics, Strategy and Accessibility, and Safety are some of the reasons mentioned by companies, however, depending on which NACE division the company operates in, the company's concern falls more on one reason or another.

The sectors of leather and leather products, as well as machinery and equipment manufacturing, frequently cite reasons related to company logistics to justify the absence of IT initiatives. On the other hand, there are sectors that did not report any concerns about logistics, namely the Food industry; Clothing industry; Wood and cork industry (except furniture); Manufacture of basketry and wickerwork; Manufacture of metal products and Manufacture of furniture and mattresses.

Within logistics, the fact that the production process is unattractive was the most frequently mentioned reason, identified by around 20% of companies.

As for accessibility and safety, 76% of the companies reported no concerns about these issues.

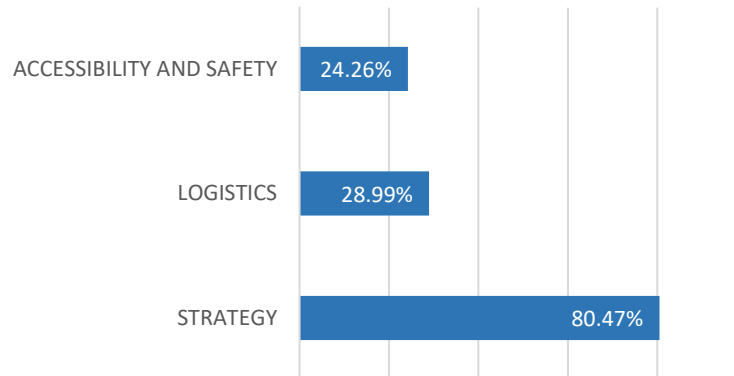
The companies within the Wood and Cork industry (excluding furniture), Manufacture of basketry and wickerwork, and Manufacture of machinery and equipment express the highest levels of concern regarding accessibility and safety issues.

Only 24% of companies say that reasons linked to accessibility and safety prevent them from promoting IT on their premises, with safety concerns being the main one.

Around 80% of companies cited reasons associated with the company's strategy. Companies in the clothing industry and the leather and leather products industry are those that most frequently cite reasons related to business strategy. Around 63% of companies say that IT does not fit in with the company's strategy and culture.

The issue of opportunity and knowledge regarding IT is also cited as one of the reasons for not participating in IT by approximately 17% of the companies.

In general, the reasons why companies don't promote IT on their premises fall into three categories, the most representative of which is associated with the company's own strategy, as shown in the figure below.



Source: Own elaboration

Figure 3: General challenges for implementing IT

Looking at the results from another perspective, we can see that the main reasons for not joining IT are related to factors internal to the company itself, where 93% of companies mentioned at least one reason. As for external factors, most companies (81%) do not point to any reason outside the company for not adopting this tourism product.

5. Discussion

The IT offering in industrial enterprises can take various forms (visits, workshops, museums, among others). IT is a service that can and should be adjusted to the company's characteristics, in line with Montenegro and Sousa (2021), who state that the success of IT depends on the company's strategy and culture.

IT allows companies to engage with diverse audiences, including prospective employees, existing customers, and the wider community, both domestically and internationally, in Portugal and beyond. As Crema et al. (2014) point out, this dynamic of outward-looking relationships can help SMEs, where a lack of resources and skills can be a barrier to innovation, by promoting open innovation management practices.

The process of diversification through IT makes it possible to achieve a wide range of benefits, namely in terms of Marketing, allowing companies to present the quality of their products and strengthen their reputation, establishing trust and understanding of their supply chain, it is also a promotional opportunity for the brand, meeting the benefits identified by several authors such as McBoyle (1996), Chow et al. (2017) and Otgaar (2012). The results found suggest that IT in industrial enterprises can also increase brand loyalty and show the company's environmental integrity, in line with the conclusions presented by McBoyle (1996), Rudd & Davis (1998) and Chow et al. (2017). Through the new service, companies promote a sustainable relationship with society, opening, making themselves known, and promoting industrial knowledge among the population.

In terms of business strategy, IT is considered by the companies surveyed to be interested in boosting a diversification strategy, in line with Duijm & Van Beveren (2022), who state that the performance of smaller companies is significantly affected by diversification, making it possible to increase the company's competitiveness and gain a greater market share.

The benefits of this diversification process also cover the area of human resources, enabling and promoting motivation in the company's employees, who will go from being factory workers to "artists/craftsmen" who have the opportunity to show their knowledge to the outside world, as well as being able to act as a recruitment strategy, in line with the idea mentioned by Nielsen (2012).

The option to diversify through IT may also bring some less positive points that should be analysed by companies to minimize them. Valtonen et al (2015) and Li et al (2021) state that the benefits and risks should be weighed up by industrial companies.

Security risks and the threat of industrial espionage are cited by companies as reasons for not promoting IT. According to Mitchell & Mitchell (2001), using the example of the Kellogg's Company, which closed its cereal factories to visitors after noticing rivals taking photographs during a public visit, the companies surveyed that promote IT also stress their concern about the problem of industrial espionage.

The attractiveness of the production process is also essential when considering the implementation of IT and can be a limiting factor when it comes to joining IT. When identifying companies with the most significant potential for IT, promoters should survey existing companies in various fields, not forgetting the sector to which they belong. Depending on the sector of activity, the obstacles to IT also vary, as highlighted in this study.

There are common concerns to also companies with and without IT, the main ones being associated with industrial espionage, security, and sources of noise, but, on the other hand, there are concerns in companies without IT that do not exist in companies with IT, and vice versa.

The companies that promote IT left encouraging comments, stressing the importance of publicizing and establishing partnerships and making suggestions to minimize some of the inconveniences that may arise when people from outside the companies enter.

The existence of a factory store in some companies could be positive and could promote a financial return on the investment made in IT. Nevertheless, based on our study and considering the limited number of companies with factory stores, definitive conclusions regarding the success or failure of this strategy cannot be drawn. However, the presence of a factory store can be viewed as an additional point of contact with visitors, fostering a connection to the brand and its products. Moreover, it represents an opportunity to sell the company's manufactured goods.

That there are reasons that, after implementing IT, no longer make sense and other limitations that are more significant, depending on whether they have already implemented IT, as shown in the image below.



Source: Own elaboration

Figure 4: Challenges identified by companies with and without IT

The threat of industrial espionage, the source of "noise" and "disruption" to daily factory life, development costs, the threat of theft, and public scrutiny are the reasons most highlighted by companies with IT. We can consider that these concerns are reinforced with the implementation of IT and are not so much emphasized by companies that do not yet promote IT.

On the other hand, some reasons were only listed by companies without IT and were not identified by companies with IT, particularly the need to spend time, IT not being aligned with the business strategy, the production

process not being very attractive, accessibility difficulties, not having been considered so far and the possibility of visits being sporadic, as can be seen in the graph below.

The company's sector of activity may be relevant to whether it is more or less open to IT. There are companies that could pose a greater number of barriers to the integration of IT, such as companies in the leather industry, metal products, and machinery and equipment.

From this study, we can see that the number of companies without IT is relatively high, representing around 90% of the companies surveyed. This demonstrates the high potential for developing this tourism product in Portuguese industrial companies.

As mentioned by Montenegro & Sousa (2021), corporate culture and strategy are essential and must be aligned with IT and vice versa. If IT is not "lived" internally it will be challenging to effectively convey it to the public, and the results may fall short of expectations. This is one of the key reasons identified in the study for the non-implementation of IT by the industrial companies surveyed.

The main barrier identified by companies relates to business strategy and culture, a challenge that, once overcome, ceases to be an issue in companies that have implemented IT. The bodies that promote IT, namely government and municipal associations and organizations, should focus their efforts on the phase of attracting active industrial companies to integrate IT proposals, on the top managers of the companies, understanding the company's culture, its business dynamics and how IT can be presented as a differentiating proposal that meets the company's objectives. After overcoming this first barrier, identified by the companies as the main barrier to implementing IT, it will be possible to analyse, together with the company, the best way to present IT to the internal public (human resources) and the external public (visitors and partners). This way, the first and foremost task of entities that promote IT is to change the culture and strategy of business managers.

Given that the industrial focus is primarily on product production, changing mindsets and establishing a new culture and strategy that incorporates IT is a challenging and complex task. No matter how many potential benefits IT can bring, if it is not integrated into the company's strategy, the benefits can be reduced.

The commitment of top managers to this new form of diversification is fundamental to the approach of IT into companies and to overcoming all the limitations associated with accessibility, safety, and logistics. IT as a form of diversification shows a lot of potential, but as Lichtenthaler (2005) points out, it must be the subject of a clearly defined strategy.

This work conducted highlights of several important insights regarding the relationship between IT and industrial enterprises. However, as mentioned by Valtonen et al. (2015), there are many advantages associated with diversification, but are also associated with concentrating on core capabilities, reinforcing the need for a careful analysis of the benefits and risks of implementing IT in active industrial enterprises.

6. Conclusions

Seeking to shed light on IT from the perspective of industrial companies, a facet that has received limited attention in research, we believe that the findings of this study are quite enlightening regarding the reality of IT in active industrial companies.

There is enormous growth potential for IT within industrial companies, where currently only a small percentage of them actively promote this tourism product. IT can serve as an opportunity for diversification and innovation within these companies.

By understanding the realities of companies that implement IT and the reasons why some industrial companies do not embrace this proposition, we can bridge the gap between the industrial and tourism sectors.

Beyond presenting conclusions, we aim to provoke reflection among industrial company managers so they can analyse the potential of this combined tourism and industrial proposition and its viability within their own companies. These conclusions are also intended for a variety of stakeholders, including policymakers, regional entities, researchers, students, tour operators, and others.

Industrial companies that promote IT identify several positive aspects of IT in the realms of Marketing, Social Impact, Business Strategy, and Human Resources. However, these same companies also recognize some negative aspects of IT, including the threat of industrial espionage, which poses a risk of disruption to daily industrial operations, development costs, security risks, and the threat of theft.

On the other hand, industrial companies that do not implement IT identify the main reasons for not doing so as being related to Security, Logistics, and Business Strategy.

As potential stakeholders who could contribute to the success of IT, companies identify the Municipal Council, Tourism Associations, Universities, Parish Councils, government entities, schools, travel agencies, hotels, and companies within their supply chain.

The daily operations of industrial companies dictate the dynamics of visits to the companies. Most companies adjust visits to their operating hours and production dynamics, without having specific spaces and schedules for this type of activity. This leads us to consider whether this dynamic of instability in schedules and types of visits may be an inhibiting factor for demand. Additionally, there is no significant investment from companies with IT in marketing this tourism product.

The intervention of the government and entities promoting IT in industrial companies should focus on internal company-level initiatives. This could include promoting awareness of IT within companies and with their decision-makers, proposing financial incentives and cost-sharing schemes to support companies in implementing IT, providing a team to assist companies in creating routes, tours, and offerings for tourists without disrupting industrial operations, establishing partnerships with travel agencies to facilitate factory visits, analysing what their target customers prefer and suggesting experiences to be organized and marketed to tourists effectively.

Regarding the company itself, it should review its production process to ensure that trade secrets are not exposed to unintended external observers. Additionally, the company should seek to establish partnerships with specialized travel agencies to create joint experiences. Delegating this responsibility to the company's marketing department can aid in effectively managing customer relations, attracting prospective clients, cultivating brand ambassadors, and harnessing the power of influencers.

Before implementing IT, the company should analyse the potential positive and negative impacts of IT on its operations, including motivational, financial, logistical, and other aspects. This thorough assessment will help the company make informed decisions and mitigate any potential risks associated with IT implementation.

There are many advantages associated with diversification, yet also with concentrating on core capabilities. This work highlights the need for a careful analysis of the benefits and risks of implementing IT in industrial enterprises, and it is essential to define a business strategy that includes this tourism product.

7. Limitations and Future Research

As the primary difficulty encountered, we have the number of participating companies in our study. This may have been due to the shortage of time on the part of company managers or their lack of motivation to take part in this type of study.

As suggestions for future studies, we recommend conducting more empirical research to analyse the partnerships established and their significance for the success of IT. From a business management perspective, maintaining dialogue with companies and understanding their needs is essential to generate valuable insights for future research. It would be interesting to understand the direct economic impact of implementing Industrial Tourism on industrial companies.

Acknowledgement

This work was supported by the UIDP/05105/2020 and the UIDB/05105/2020 Program Contracts, funded by national funds through the FCT I.P.

References

- Botella, M. D. P. (2018). The heritage of the industry: a tourist referent to explore in the Region of Murcia [Article]. Cuadernos De Turismo(41), 491-512. <https://doi.org/10.6018/turismo.41.327121>
- Chan, L. F., An, B. A., & Nasir, A. B. M. (2019). Does the method of corporate diversification matter to firm's performance? In International Symposia in Economic Theory and Econometrics (Vol. 26, pp. 208-233). <https://doi.org/10.1108/S1571-038620190000026011>
- Chow, H. W., Ling, G. J., Yen, I. Y., & Hwang, K. P. (2017). Building brand equity through industrial tourism. Asia Pacific Management Review, 22(2), 70-79. <https://doi.org/10.1016/j.apmr.2016.09.001>
- Couto, G., Cabral, J., Pimentel, P., & Castanho, R. A. (2021). The level of diversification on the firms of the iberian market. WSEAS Transactions on Business and Economics, 18 C7 - 93, 978-985. <https://doi.org/10.37394/23207.2021.18.93>

- Crema, M., Verbano, C., & Venturini, K. (2014). Linking strategy with open innovation and performance in SMEs. *Measuring Business Excellence*, 18(2), 14-27. <https://doi.org/10.1108/MBE-07-2013-0042>
- Dang, R., Houanti, L., & Bonnand, A. (2016). Exploring the effect of diversification strategy on R&D intensity using quantile regression: evidence from France. *Applied Economics Letters*, 23(18), 1317-1320. <https://doi.org/10.1080/13504851.2016.1153784>
- Danjou, S., & Koehler, P. (2007). Challenges for Design Management. *Computer-Aided Design and Applications*, 4(1-4), 109-116. <https://doi.org/10.1080/16864360.2007.10738531>
- Duijm, P., & Van Beveren, I. (2022). Product diversification as a performance boosting strategy? Drivers and impact of diversification strategies in the property-liability insurance industry. *Risk Management and Insurance Review*, 25(3), 303-328. <https://doi.org/10.1111/rmir.12219>
- Endo, Y., & Kurata, Y. (2015). Customer communication facilities with tourism: A comparison between German and Japanese automobile companies. In *Advances in Culture, Tourism and Hospitality Research* (Vol. 10, pp. 221-233): Emerald Group Publishing Ltd.
- Grant, R. M. (1991). THE RESOURCE-BASED THEORY OF COMPETITIVE ADVANTAGE - IMPLICATIONS FOR STRATEGY FORMULATION. *California Management Review*, 33(3), 114-135.
- INE. (2021). Estatísticas da Produção Industrial 2020. In (Vol. Edição 2021): Instituto Nacional de Estatística.
- Lee, H. H., & Nguyen, M. T. N. (2021). Applying Fuzzy Delphi Method and ANP to Analyze Instrumental Attributes in Purchasing Sustainable Apparel Products. *International Journal of Information and Management Sciences*, 32(3), 209-221. [https://doi.org/10.6186/IJIMS.202109_32\(3\).0002](https://doi.org/10.6186/IJIMS.202109_32(3).0002)
- Li, Y., Biloshchytskyi, A., Bronin, S., & Liaschenko, T. (2021). A Conceptual Model for Diversification Strategies Choice. *SIST 2021 - 2021 IEEE International Conference on Smart Information Systems and Technologies C7 - 9465934*, 9465934.
- Lichtenthaler, E. (2005). Corporate diversification: Identifying new businesses systematically in the diversified firm. *Technovation*, 25(7), 697-709. <https://doi.org/10.1016/j.technovation.2003.12.005>
- Lukas, B. A. (1999). Strategic type, market orientation, and the balance between adaptability and adaptation. In (Vol. 45(2), pp. 147-156): *Journal of Business Research*.
- McBoyle, G. (1996). Green tourism and Scottish distilleries. *Tourism Management*, 17(4), 255-263. [https://doi.org/10.1016/0261-5177\(96\)00017-9](https://doi.org/10.1016/0261-5177(96)00017-9)
- Mitchell, M., & Mitchell, S. (2001). Showing off what you do (and how you do it). *Journal of Hospitality and Leisure Marketing*, 7(4), 61-77. https://doi.org/10.1300/J150v07n04_06
- Montenegro, Z., Marques, J., & Sousa, C. (2022). Understanding the Concept of Industrial Tourism: A Systematic Review of the Literature. In J. Marques & C. Sousa (Eds.), (pp. 271-280). *Proceedings of the 5th International Conference on Tourism Research, 2022: Academic Conferences International Limited*.
- Montenegro, Z., & Sousa, C. (2021). Managers' perception of the effects of creative and industrial tourism on industrial companies C3 - *Proceedings of the International Conference on Tourism Research*.
- Moral-Moral, M., & Fernandez-Alles, M. T. (2019). Perceptions of the local resident to industrial tourism as a sustainable development model [Article]. *Revista De Estudios Regionales*(114), 45-69.
- Nielsen, N. C. (2012). Industrial Tourism: Opportunities for City and Enterprise. *Tourism Geographies*, 14(3), 532-534. <https://doi.org/10.1080/14616688.2011.609902>
- Orlando, B., Renzi, A., Sancetta, G., & Cucari, N. (2018). How does firm diversification impact innovation? *Technology Analysis and Strategic Management*, 30(4), 391-404. <https://doi.org/10.1080/09537325.2017.1313405>
- Otgaar, A. (2012). Towards a common agenda for the development of industrial tourism. *Tourism Management Perspectives*, 4, 86-91. <https://doi.org/10.1016/j.tmp.2012.05.004>
- Pardo Abad, C. J. (2017). Sostenibilidad Y turismo en los paisajes culturales de la industrialización. In (Vol. julio-septiembre, pp. 103-785). *Arbor, Ciencia, Pensamiento Y cultura*.
- Porter, M. E. (1985). *Competitive Advantage. Creating and Sustaining Superior Performance*. In. Free Press, New York.
- Rudd, M. A., & Davis, J. A. (1998). Industrial heritage tourism at the Bingham Canyon copper mine. *Journal of Travel Research*, 36(3), 85-89. <https://doi.org/10.1177/004728759803600310>
- Shen, N., Au, K., & Yi, L. (2018). Diversification Strategy, Ownership Structure, and Financial Crisis: Performance of Chinese Private Firms. *Asia-Pacific Journal of Financial Studies*, 47(1), 54-80. <https://doi.org/10.1111/ajfs.12203>
- Silalahi, E. E., & Bimo, I. D. (2021). DIVERSIFICATION, CEO COMMITMENT, AND FIRM PERFORMANCE. *Dynamic Relationships Management Journal*, 10(2), 19-29. <https://doi.org/10.17708/DRMJ.2021.v10n02a02>
- Teece, D. J., Pisano, G., & Shuen, A. (1997). Dynamic capabilities and strategic management. *Strategic Management Journal*, 18(7), 509-533. [https://doi.org/10.1002/\(sici\)1097-0266\(199708\)18:7<509::aid-smj882>3.0.co;2-z](https://doi.org/10.1002/(sici)1097-0266(199708)18:7<509::aid-smj882>3.0.co;2-z)
- Valtonen, M., Pätäri, S., Jantunen, A., Kyläheiko, K., & Sandström, J. (2015). Diversification strategies in the global pulp and paper industry - empirical analysis from years 1996 and 2006. *International Journal of Business Innovation and Research*, 9(1), 15-33. <https://doi.org/10.1504/IJBIR.2015.065951>
- Zhang, J., Cenci, J., Becue, V., Koutra, S., & Ioakimidis, C. S. (2020). Recent evolution of research on industrial heritage in Western Europe and China based on bibliometric analysis. *Sustainability (Switzerland)*, 12(13). <https://doi.org/10.3390/su12135348>
- Zuo, H., Li, W., & Alam, S. S. (2023). Relationship between Diversification, Institutional Environment and Growth: A Study of Agricultural Companies in China. *Sustainability (Switzerland)*, 15(7 C7 - 6216). <https://doi.org/10.3390/su15076216>

Green Leadership, Motivation, Commitment and Performance in the Operational Teams of the Portuguese Hospitality Industry

Raquel Moura¹, Carlos Rouco^{2,3} and Mafalda Patuleia^{2,3,4}

¹Lusofona University, Lisbon, Portugal

²Lusofona University Intrepid Lab, Lisbon, Portugal

³CETRAD, Porto, Portugal

⁴GOVCOPP, Aveiro University, Aveiro, Portugal

raquel.filipa.moura@gmail.com

carlos.rouco@ulusofona.pt

mafalda.patuleia@ulusofona.pt

Abstract: This study examines the relationships between green transformational leadership, green motivation, green commitment, and green performance in the Portuguese hospitality sector. Using a quantitative approach, data were collected from 127 operational hotel employees through a structured questionnaire with 28 closed-ended questions across four dimensions. Statistical analysis, including Pearson correlations and multiple linear regression, confirmed significant positive correlations between the variables. The results showed that green commitment plays a crucial mediating role, acting as the main predictor of green performance. However, contrary to previous studies, green transformational leadership and green motivation did not directly influence performance. These findings underscore the need for companies to enhance green commitment training, incentives and employee alignment with sustainable practices. Future research should explore additional factors that influence green performance, such as corporate social responsibility and alternative leadership styles.

Keywords: Green transformational leadership, Green motivation, Green commitment, Green performance, Hospitality

1. Introduction

Sun et al. (2022) state that the industrial revolution has contributed significantly to environmental degradation and that it can be divided into three phases: the first, with mechanization; the second, with mass production; and the third, with automation. The same authors add a fourth phase, marked by digital progress, in which sustainability is a central feature.

While sustainability is not a new issue, it has become an urgent issue due to the rapid degradation of ecosystems and the imminent threat to humanity and companies. This issue has gained a place on global agendas as a central challenge (Naz et al., 2021; Wiredu et al., 2023). According to Robertson and Barling (2017), companies are co-responsible for climate change as they continue to emit harmful substances such as chemicals and carbon dioxide, damaging the environment. Given this scenario, society, regulatory bodies, and stakeholders are putting pressure on businesses to adopt sustainable practices (Abbas, 2020; Gunarathne et al., 2021). In this sense, sustainability has become a priority for companies to consider in their strategic plans. In general, the implementation of sustainable practices in organizations also depends on the motivation and commitment of their leaders and employees. Leaders have a responsibility to make decisions that consider the environmental and social impacts, thus contributing to the company's "green footprint" (Zhao & Huang, 2022). According to Bhatti et al. (2022), the adoption of sustainable practices helps to reduce absenteeism and increase employee engagement and satisfaction. Chan et al. (2020) found that more than 70% of TripAdvisor users prefer hotels that adopt environmental practices.

The general aim of this study is to understand how leadership and motivation in the hospitality sector in Portugal promote sustainable practices by improving employees' green performance. Therefore, the starting question is: What is the impact of transformational leadership and green motivation on employee commitment and green performance?

2. Theoretical Background

2.1 Green Transformational Leadership

Yukl (2013, p. 2) defines leadership as "the process of influencing others to understand and agree on what needs to be done and how to do it effectively, and the process of facilitating individual and collective efforts to achieve shared goals.". In this sense, leaders are defined as people who shape the behaviors and attitudes of their employees by providing all the support and resources necessary to perform tasks well (Xu et al., 2022).

According to Bass and Avolio (1993), transformational leadership has a strong impact on the success of companies, surpassing the level of success of their market competitors who use a different style. Ababneh et al (2021) found that this leadership style can align employees with the mission, values and vision of the organization. Transformational leadership has four dimensions that, when perceived, contribute to employee behavior (Bass, 1985). These are individualized consideration, inspirational motivation, intellectual stimulation, and idealized influence (Bass, 1985). Faced with the climate issues of recent years and the pressures already identified, business leaders have been forced to develop a pro-environmental spirit. Suliman et al. (2023) found that leaders with a green transformational leadership style enable their organizations to respond more effectively to these pressures.

Green transformational leadership is based on the theory of transformational leadership when Robertson and Barling (2013, p. 2) applied it to the environmental context and defined it as “the manifestation of transformational leadership whose content is focused on promoting pro-environmental initiatives.”. Chen and Chang (2013) characterize green transformational leadership by the fact that the leader has the ability to motivate their employees to achieve sustainable goals that go beyond what is expected of them, with an environmental focus. Omarova and Jo (2022) state that this type of leadership occurs when the leader focuses on influencing companies' environmental obligations. The focus on the green agenda and the full support of strategic management, coupled with the practices coming from Human Resources, are factors that may lead leaders to express this type of leadership (Mansoor et al., 2021). In addition, green transformational leaders inspire and motivate their team members to understand and articulate the company's vision (Omarova & Jo, 2022) and not to be so self-centered that they work only to achieve their personal goals, but rather to achieve sustainable organizational goals (Li et al., 2020; Suliman et al., 2023).

In addition to the characteristics already mentioned, the green leader, by having a high commitment to the “green” cause, hopes to inspire and increase the commitment of their employees and get them to commit to developing environmentally friendly behavior or making choices that do not harm the environment (Omarova & Jo, 2022). Donmez-Turan and Kiliclar (2021) point out that green behaviors are all those aimed at respecting and protecting nature and ecosystems. This type of leadership has been recommended by some authors as an important factor in increasing green motivation, which leads employees to higher sustainable performance (Lin et al., 2022; Kusi et al., 2021). Akram et al. (2022), Elshaer et al. (2022), Omarova and Jo (2022), Peng et al. (2021), Rizvi and Garg (2020), Rustiarini et al. (2023); Sobaih et al. (2022), and Sun et al. (2022) state that green transformational leadership fosters sustainable behavior in employees and in turn increases their environmental performance. The study by Singh et al. (2020) concluded that green transformational leadership makes hotel employees feel more inspired and receptive to sustainable practices.

2.2 Green Motivation

Pinder (2008) defined motivation as a set of energetic forces, both internal and external to the individual, that determine the initiation, duration and intensity of behaviour in the performance of tasks. The way in which employees carry out their tasks depends on their managers and how they manage to meet their needs and expectations (Davis et al., 2009). For Al Shammre et al. (2023), Li et al. (2020) and Lin (2023), green motivation is divided into two types, namely: extrinsic, which occurs when the individual exerts extra effort through external factors, such as salary promotion, prizes or prestige for themselves, or to avoid punishment from others; intrinsic, which occurs when the individuals feel that their motivation comes from passion, internal satisfaction and pride in achieving sustainable goals and objectives. However, Ali et al. (2020) point out that either of these two types of green motivation will increase employees' environmental performance.

According to Nguyen (2019), hotel companies that include sustainability issues in their strategic guidelines show higher levels of employee motivation. Other consequences include greater employee interest in participating in environmental activities (Shafaei et al., 2020). Malik et al. (2021) report that employees with more pro-environmental behaviors have higher levels of motivation to achieve the hotel's environmental objectives. Karatepe et al. (2022) argue that employees who feel enthusiastic and motivated by green practices and initiatives created within the organization tend to have higher levels of commitment to their work and perform better at their tasks. Green motivation also increases an organization's environmental citizenship behaviors and makes employees take initiative and volunteer on behalf of the company, their co-workers and the community (Anwar, 2020). In addition, Karatepe et al. (2022) found that employees who show greater green commitment tend to acquire more environmental skills and knowledge through environmental training. Investing in the sustainable part of human resources, such as giving out green awards, selecting green-inspired workers, and providing opportunities for career progression, makes employees feel more motivated to reward the company

through higher levels of environmental commitment and performance (Ari et al., 2020). According to Susanto et al. (2024), companies with low levels of green motivation have higher turnover and greater difficulties with employee retention.

Hypothesis 1: There are significant positive correlations between green transformational leadership and green motivation.

2.3 Green Commitment

The term “commitment to work” refers to the spontaneous sense of responsibility that employees have for organizational goals based on their appreciation and internalization of these goals, as well as the company's values (Huang et al., 2021). Such commitment, from an environmental perspective, is called “green commitment at work” and is an adaptation of the term described above (Aboramadan, 2022). Green environmentalism is defined as the spontaneity, enthusiasm, and dedication felt by employees when they make extra efforts to carry out tasks of a sustainable nature (Karatepe et al., 2022).

Several authors have linked employees' green commitment to a reduction in burnout, characterized by emotional exhaustion caused by high levels of stress and work demands, highlighting the importance of employees' psychological well-being and satisfaction (Çop et al., 2021). Zhu et al. (2022) concluded that employees with higher levels of commitment to sustainable work are more likely to work harder and prioritize solving problems related to the environment. Employees who are committed to the green environment act beyond their own interests (Zhu et al., 2022) and have higher levels of energy, resilience, connectedness, and effectiveness towards their work (Robjin et al., 2020). Çop et al. (2021) also add that aspects such as higher levels of motivation, enthusiasm, and involvement in carrying out daily tasks are noticeable when it comes to employees committed to green work. Purba and Tikurura (2022) defend the same position by concluding that high levels of green commitment on the part of employees will result in increased satisfaction and greater productivity, which helps companies to prevent future problems.

According to Raineri and Paillé (2016), employees with greater environmental commitment have a clearer vision and more deeply rooted environmental values. The same authors state that environmental commitment promotes higher levels of intrinsic (internal) motivation, which will make them more willing to make extra efforts for environmental protection. Zhang et al. (2020) state that employees committed to sustainable measures in the company have a direct and positive relationship with increases in employee performance. Aboramadan et al. (2020) and Suliman et al. (2023) state that environmental commitment acts as a predictor of employees' green performance.

Hypothesis 2: There are significant positive correlations between green transformational leadership and green employee commitment.

Hypothesis 3: There are significant positive correlations between green motivation and green employee commitment.

2.4 Green Performance

For Kim et al. (2019) and Singh et al. (2020), the term “green performance” is significantly related to the green behavior of employees, as well as green innovation (also called green effects), which arises for management to create green initiatives by management to eliminate negative environmental effects and is strongly dependent on employee motivation (Kim & Phillips, 2013).

To ensure that a company's environmental purpose is achieved, and sustainable actions are practiced, it is necessary for the leader to pay attention to the various processes integrated into sustainable human resource management practices, such as recruitment, selection, training and development, as well as compensation and talent management (Pham et al., 2020). By adapting or correcting HRM practices, leaders can influence their employees to adopt sustainable attitudes and behaviors, as well as develop knowledge in the area, thus motivating them to deepen their knowledge on the subject and contribute to individual and organizational sustainable development through conscious behavior (Younis & Hussain, 2023).

Green recruitment, which is an integral part of sustainable human resource management, is based on the idea that management should select candidates who demonstrate that they have the same environmental values as the company, i.e. that they have preferences that are in line with sustainability policies, thus creating a link between employer and employee (Younis & Hussain, 2023). Environmental training for employees is in line with the thesis that employees can work on skills that are important for the creation of environmentally friendly

products and practices and that ultimately increase their commitment to the “green” cause (Aggarwal et al., 2022). Finally, bonuses and compensation are incentives not to be discarded by management.

In the case of hotels and similar to other sectors, in order for hotel employees to show high green performance in their actions and activities, they need to be committed to the hotel's environmental strategy and aware of the environmental problems, which are already quite complex; they need to be committed and attentive to the initiatives that the hotel develops (Ababneh et al., 2021). This is because, once they are interested in such initiatives, career progression, change, and adaptation and have behaviors that are seen as innovative, they are also motivated to perform their duties, adhering to job requirements and company policies (Presbitero, 2017, cited by Ababneh et al., 2021).

Hypothesis 4: There are significant positive correlations between green transformational leadership and green employee performance.

Hypothesis 5: There are significant positive correlations between green motivation and green employee performance.

Hypothesis 6: Employees' green commitment is a predictor of their green performance.

After reviewing the literature and establishing the relationship between the variables under study, the conceptual model was drawn up, as shown in Figure 1.

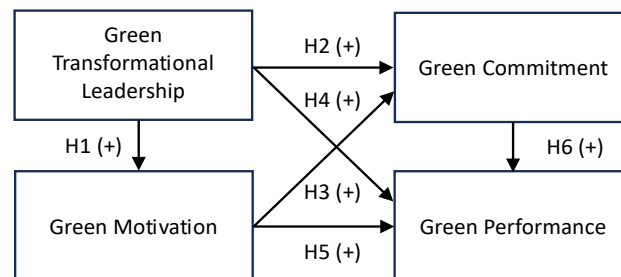


Figure 1: Conceptual model

3. Methodology

In order to verify the hypotheses presented above, we used a quantitative method, applying a questionnaire with closed questions. The questionnaire consists of 2 parts: The first part has 3 sociodemographic questions, with a nominal scale. The second part of the questionnaire consists of 25 items divided into the following 4 dimensions: green transformational leadership, green motivation, green commitment, and green performance. The first dimension “green transformational leadership”, with 6 items, was taken from the “green transformational leadership” questionnaire by Zhang et al. (2020). The second dimension, “green motivation”, with 3 items was taken from the “green motivation” questionnaire by Úbeda-García et al. (2022). The third dimension is “green commitment” with 6 items taken from the “green work engagement” questionnaire by Aboramadan (2022). The fourth dimension, “green performance”, with 7 items taken from the “hotel environmental performance” questionnaire by Kim et al. (2019) and Paillé and Meija-Morelos (2019). The original Likert scale of 1 to 5 for each of the dimensions was adapted to an agreement scale ranging from 1 to 7. Where 1 corresponds to “totally disagree” and 7 to “totally agree.”. The internal validation values (Cronbach's alpha) for each of the dimensions under study are as follows: green transformational leadership (0.95), green motivation (0.81), green commitment (0.92), and green performance (0.88).

The questionnaire was applied to a sample of operational hotel employees (receptionist, chambermaid, head waiter, waiter, bartender, among others) and was chosen for convenience, as it was simpler and quicker to obtain. The questionnaire received 127 responses via Google Forms between April and June 2024. As for age groups, 26% (33 individuals) were between 18 and 24 years old; 22.8% (29 individuals) were between 25 and 35 years old, 32.3% (41 individuals) were between 36 and 50 years old, and 18.9% (24 individuals) were over 50 years old. As for gender, 55.1% (70) were female and 44.9% (57) were male.

In order to verify the hypotheses, namely the existence of correlations between the variables under study, the Bravais-Pearson correlation was used, and, in order to identify predictive dimensions of criterion factors, linear

regressions were carried out, which required the Shapiro-Wilk normality test ($n > 30$) and homogeneity tests (Levene test).

4. Findings and Discussion

Table 1 presents the results of the Bravais-Pearson correlations between the variables under study. From the analysis of the results, it is observed that all hypotheses were confirmed, as the correlations are significant and positive between the analyzed variables, with values ranging from 0.65 to 0.81 (p -value < 0.05). These results support the theoretical assumptions of the reviewed literature and demonstrate the significant influence of green transformational leadership and green motivation on the green commitment and performance of Portuguese hospitality employees.

Table 1: Pearson Correlations between the variable green transformational leadership, motivation, commitment, and performance

Dimensions	Green transformational leadership	Green motivation	Green commitment	Green performance
Green transformational leadership	1	0,81**	0,72**	0,65**
Green motivation	0,81**	1	0,73**	0,65**
Green commitment	0,72**	0,73**	1	0,79**
Green performance	0,65**	0,65**	0,79**	1

** . The correlation is significant at the 0.01 level (2-tailed).

According to the results in Table 1, Hypothesis 1, green transformational leadership has a strong positive correlation with green motivation ($r = 0.81$, $p < 0.05$). These results corroborate previous studies (Akram et al., 2022; Omarova & Jo, 2022), which highlight that leaders with an environmental focus encourage employees' motivation to adopt sustainable behaviors. Hypothesis 2, green transformational leadership, is positively correlated with green commitment ($r = 0.72$, $p < 0.05$), where these values are aligned with the investigations of Raineri and Paillé (2016) and Zhang et al. (2020), which indicate that employees influenced by transformational leaders develop a greater commitment to environmental practices. Hypothesis 3, green motivation, is positively correlated with green commitment ($r = 0.73$, $p < 0.05$), where these results reinforce those of Karatepe et al. (2022) and Malik et al. (2021), which highlight that employees motivated by environmental issues tend to be more committed to the company's sustainable strategy. Hypothesis 5: Green motivation and green performance are significantly correlated ($r = 0.65$, $p < 0.05$), where these results confirm the literature review (Anwar, 2020) which state that more motivated employees tend to demonstrate higher green performance.

The results obtained in this study confirm and reinforce the importance of green transformational leadership in promoting sustainable practices in the hospitality sector in Portugal. The influence of leaders is fundamental to motivating and committing employees to the company's environmental goals, aligning with the results achieved by Robertson and Barling (2013) and Mansoor et al. (2021). The green motivating of employees in Portuguese hospitality plays a critical role in their adherence to sustainable practices, as stated by Nguyen (2019) and Malik et al. (2021). Also, the results indicate that green commitment acts as a critical mediator between green transformational leadership, green motivation, and green performance. Employees with high levels of green commitment are more likely to adopt sustainable behaviors, contributing to the success of the implementation of the companies' initiatives. Studies such as those by Zhu et al. (2022) and Zhang et al. (2020) had already indicated these relationships, and the results of the present study reinforce these relationships.

To verify Hypothesis 6, it is considered that the green commitment of employees is a significant predictor of green performance. To test this hypothesis, the multiple linear regression method was used, considering green performance as the dependent variable and green transformational leadership, green motivation, and green commitment as independent variables. The results obtained demonstrate the robustness of the model and the validity of the hypothesis under study. The statistical tests indicate that the regression model is significant, with an F-statistic of 72.9% and a p -value < 0.01 , confirming that the independent variables explain a substantial portion of the variability in green performance. The adjusted R-squared of 64% indicates that the variance in employees' green performance can be explained by the variables considered in the model, while 36% is attributed to other unconsidered factors.

Table 2 shows that only the green commitment of Portuguese hospitality employees has a significant predictive effect on green performance (Beta = 0.64; $p < 0.01$), validating hypothesis 6 and corroborating previous studies, such as those by Aboramadan et al. (2020) and Suliman et al. (2023). On the other hand, green transformational leadership ($p=0.21$) and green motivation ($p=0.41$) did not present statistically significant coefficients, indicating that, in the analyzed context, these variables do not directly contribute to green performance. The model equation can be represented as follows: Green performance = 2.17 + 0.55 (Green commitment).

Table 2: Coefficients of the dependent variable (DV) with the independent variables (green motivation, green commitment, and green transformational leadership) with a p-value<0.01

Model	Unstandardized coefficients		Standardized coefficients	t	Sig.	Collinearity statistics	
	β	Standard Error	Beta			Tolerance	VIF
(Constant)	2,17	0,27		8,14	0,00		
Green transformational leadership	0,09	0,07	0,13	1,23	0,21	0,30	3,31
Green commitment	0,55	0,07	0,64	7,70	0,00	0,42	2,36
Green motivation	0,05	0,07	0,08	0,83	0,41	0,30	3,36

Variable dependent: Green performance.

The results achieved reinforce the importance of the green commitment of Portuguese hospitality employees as an essential factor for promoting green performance. The high standardized coefficient (Beta = 0.64) indicates that committed employees are likely to adopt sustainable behaviors, corroborating studies by Zhang et al. (2020) and Raineri and Paillé (2016), which identify the positive relationship between green commitment and green performance. Although the literature suggests that green transformational leadership and green motivation can influence green performance (Kim et al., 2019; Singh et al., 2020), the results achieved in this study indicate that these factors did not have a significant impact on the proposed model. A possible explanation for this discrepancy may be related to the specific organizational context, organizational culture, or already incorporated environmental practices. Moreover, the Tolerance and VIF values indicate that there are no multicollinearity issues, although the higher VIF values for green transformational leadership and green motivation suggest some correlation between these variables.

5. Conclusion

This study contributes to the literature by providing quantitative evidence on the relationship between green transformational leadership, green motivation, green commitment, and green performance in Portuguese hospitality. The study confirms that the green commitment of Portuguese hospitality employees is a strong predictor of green performance.

As practical implications, it is suggested that companies in the hospitality sector in general invest in training and education on green leadership practices to enhance the commitment and green performance of employees, promoting a more sustainable and environmentally responsible sector. Furthermore, the results highlight the need for the hospitality sector to invest in strategies that promote employees' green commitment, such as implementing training programs to reinforce ecological awareness, developing a system of rewards and incentives for employees who demonstrate a high environmental commitment; greater alignment between organizational culture and sustainable practices, and promoting social responsibility initiatives that engage employees.

For future research, it is suggested to explore other variables in green performance, such as social responsibility and other leadership styles. It would also be relevant to investigate whether different sectors exhibit distinct patterns regarding the influence of leadership and green motivation on environmental performance.

References

- Ababneh, O. M. A. (2021). "How do green HRM practices affect employees' green behaviors? The role of employee engagement and personality attributes". *Journal of Environmental Planning and Management*, 64(7), 1–23. <https://doi.org/10.1080/09640568.2020.1814708>.
- Abbas, J. (2020). "Impact of total quality management on corporate green performance through the mediating role of corporate social responsibility.". *J. Clean. Prod. J.* 242, 118458–118512. doi:10.1016/j.jclepro.2019.118458.

- Aboramadan, M. (2022). "The effect of green HRM on employee green behaviors in higher education: The mediating mechanism of green work engagement". *International Journal of Organizational Analysis*, 30(1), 7-23. <https://doi.org/10.1108/ijoa-05-2020-2190>.
- Aboramadan, M., Dahleez, K., and Hamad, M.H. (2020), "Servant leadership and academics outcomes in higher education: The role of job satisfaction", *International Journal of Organizational Analysis*, 29(3), 562-584.
- Aggarwal, P., and Agarwala, T. (2022). "Relationship of green human resource management with environmental performance: mediating effect of green organizational culture". *Benchmarking: An International Journal*, 30(7), 2351-2376. <https://doi.org/10.1108/bij-08-2021-0474>.
- Akram, H., Raza, M., Jan, M. F., Aslam, S., & Nivin-Vargas, L. (2022). Identified leadership practices and teachers' professional development in Karachi, Pakistan: the moderation effect of training. *Education*, 3-13, 52(8), 1309-1326. <https://doi.org/10.1080/03004279.2022.2146455>.
- Al Shammre, A. S., Alshebami, A. S., Ali Seraj, A. H., Elshaer, I. A., and Al Marri, S. H. (2023). "Unleashing environmental performance: The impact of green entrepreneurial motivation on small enterprises". *Frontiers in Environmental Science*, 11. <https://doi.org/10.3389/fenvs.2023.1176804>.
- Bass, B. M., and Avolio, B. J. (1993). "Transformational leadership: A response to critiques". In M. M. Chemers & R. Ayman (Eds.), *Leadership theory and research: Perspectives and directions* (pp. 49-80). *Academic Press*.
- Bhatti, M.A., Alyahya, M., Juhari, A.S., and Alshiha, A.A. (2022). "Green HRM Practices and Employee Satisfaction in the Hotel Industry of Saudi Arabia". *Int. J. Oper. Quant. Manag*, 28, 100-120.
- Chan, E. S. W., Okumus, F., and Chan, W. (2020). "What hinders hotels' adoption of environmental technologies: A quantitative study". *International Journal of Hospitality Management*, 84, 102324. <https://doi.org/10.1016/j.ijhm.2019.102324>.
- Chen, Y. S., and Chang, C. H. (2013). "The Determinants of Green Product Development Performance: Green Dynamic Capabilities, Green Transformational Leadership, and Green Creativity". *Journal of Business Ethics*, 116, 107-119. <https://doi.org/10.1007/s10551-012-1452-x>.
- Çop, S., Olorunsola, V. O., and Alola, U. V. (2021). "Achieving environmental sustainability through green transformational leadership policy: Can green team resilience help?" *Business Strategy and the Environment*, 30(1), 671-682. <https://doi.org/10.1002/bse.2646>.
- Davis, J. L., Green, J. D., and Reed, A. (2009). "Interdependence with the environment: Commitment, interconnectedness, and environmental behavior". *Journal of Environmental Psychology*, 29(2), 173-180. <https://doi.org/10.1016/j.jenvp.2008.11.001>.
- Donmez-Turan, A., and Kiliclar, I. E. (2021). "The analysis of pro-environmental behaviour based on ecological worldviews, environmental training/ knowledge and goal frames". *Journal of Cleaner Production*, 279. <https://doi.org/10.1016/j.jclepro.2020.123518>.
- Elshaer, I. A., Abdelrahman, M. A., Azazz, A. M. S., Alrawad, M., and Fayyad, S. (2022). "Environmental transformational leadership and green innovation in the hotel industry: Two moderated mediation analyses". *International Journal of Environmental Research and Public Health*, 19(24). <https://doi.org/10.3390/ijerph192416800>.
- Gunaratne A. N., Lee K. H., and Hitigala Kaluarachchilage P. K. (2021). "Institutional pressures, environmental management strategy, and organizational performance: The role of environmental management accounting". *Business Strategy and the Environment*, 30(2): 825-839. <https://doi.org/10.1002/bse.2656>.
- Kim, H. R., Phillips, F. (2013). "Innovation Capabilities in Bio-Pharmaceutical R&D". *Management Review: An International Journal*, 8(1), 76.
- Kim, Y. J., Kim, W. G., Choi, H.-M., and Phetvaroon, K. (2019). "The effect of green human resource management on hotel employees' eco-friendly behavior and environmental performance". *International Journal of Hospitality Management*, 76(1), 83-93. <https://doi.org/10.1016/j.ijhm.2018.04.007>.
- Kusi, M., Zhao, F., and Sukamani, D. (2021). "Impact of perceived organizational support and green transformational leadership on sustainable organizational performance: A SEM approach". *Business Process Management Journal*, 27(5), 1373-1390. <https://doi.org/10.1108/bpmj-09-2020-0419>.
- Li, W., Bhutto, T. A., Xuhui, W., Maitlo, Q., Zafar, A. U., and Ahmed Bhutto, N. (2020). "Unlocking employees' green creativity: The effects of green transformational leadership, green intrinsic, and extrinsic motivation". *Journal of Cleaner Production*, 255(3), 120229. <https://doi.org/10.1016/j.jclepro.2020.120229>.
- Li, Z., Xue, J., Li, R., Chen, H., and Wang, T. (2020). "Environmentally specific transformational leadership and employee's pro-environmental behavior: The mediating roles of environmental passion and autonomous motivation". *Front. Psychol*, 11 (1408), 1-13.
- Likert, R. (1967). *"The human organization: its management and values"*. McGraw-Hill.
- Lin, Y. H. (2023). "Determinants of green purchase intention: The roles of green enjoyment, green intrinsic motivation, and green brand love". *Sustainability (Switzerland)*, 15(1). <https://doi.org/10.3390/su15010132>
- Malik, S. Y., Hayat Mughal, Y., Azam, T., Cao, Y., Wan, Z., Zhu, H., and Thursamy, R. (2021). "Corporate social responsibility, green human resources management, and sustainable performance: Is organizational citizenship behavior towards environment the missing link?" *Sustainability*, 13(3), 1044.
- Mansoor, A., Farrukh, M., Lee, J.-K., and Jahan, S. (2021). "Stimulation of employees' green creativity through green transformational leadership and management initiatives". *Sustainability*, 13(14), 7844. <https://doi.org/10.3390/su13147844>.

- Ministério da Economia e do Mar. (2023). Secretaria de Estado do Turismo Comércio e Serviços. *Agenda Profissões do Turismo*. Disponível em: <https://www.turismodeportugal.pt/SiteCollectionDocuments/formacao/agenda-profissoes-turismo-2023.pdf>.
- Naz S, Jamshed S, Nisar QA, et al. (2021). "Green HRM, psychological green climate and pro-environmental behaviors: An efficacious drive towards environmental performance in China". *Current Psychology*, 42(4): 1–16. <https://doi.org/10.1007/s12144-021-01412-4>.
- Omarova, L., and Jo, S. J. (2022). "Employee pro-environmental behavior: The impact of environmental transformational leadership and GHRM". *Sustainability (Switzerland)*, 14(4). <https://doi.org/10.3390/su14042046>
- Paillé, P., and Meija-Morelos, J. H. (2019). "Organisational support is not always enough to encourage employee environmental performance. The moderating role of exchange ideology". *Journal of Cleaner Production*, 220, 1061–1070. <https://doi.org/10.1016/j.jclepro.2019.02.192>.
- Peng, J., Chen, X., Zou, Y., and Nie, Q. (2021). "Environmentally specific transformational leadership and team pro-environmental behaviors: The roles of pro-environmental goal clarity, pro-environmental harmonious passion, and power distance". *Human Relations*, 74(11), 001872672094230. <https://doi.org/10.1177/0018726720942306>.
- Pham, N. T., Vo-Thanh, T., Shahbaz, M., Duc Huynh, T. L., and Usman, M. (2020). "Managing environmental challenges: Training as a solution to improve employee green performance". *Journal of Environmental Management*, 269, 110781. <https://doi.org/10.1016/j.jenvman.2020.110781>.
- Pinder, C.C. (2008). "Work motivation in organizational behavior". (2^a ed.). Psychology Press. Nova Iorque.
- Purba, S. D., and Tikurura, R. (2022). "Effect mediation of green behaviors on green employee involvement in improving job satisfaction in pusat sistem informasi dan teknologi keuangan (PUSINTEK). *KINERJA*, 26(1), 151–166. <https://doi.org/10.24002/kinerja.v26i1.5566>.
- Raineri, N., and Paillé, P. (2016). "Erratum to: Linking corporate policy and supervisory support with environmental citizenship behaviors: The role of employee environmental beliefs and commitment". *Journal of Business Ethics*, 137(1), 211–211. <https://doi.org/10.1007/s10551-016-3170-2>.
- Rizvi, Y. S., and Garg, R. (2020). "The simultaneous effect of green ability-motivation-opportunity and transformational leadership in environment management: the mediating role of green culture". *Benchmarking: An International Journal*. <https://doi.org/10.1108/bij-08-2020-0400>.
- Robertson, J. L., and Barling, J. (2013). "Greening organizations through leaders' influence on employees' pro-environmental behaviors". *Journal of Organizational Behavior*, 34(2), 176–194. <https://doi.org/10.1002/job.1820>.
- Robertson, J. L., and Barling, J. (2017). "Toward a new measure of organizational environmental citizenship behavior". *Journal of Business Research*, 75, 57–66. <https://doi.org/10.1016/j.jbusres.2017.02.007>.
- Robijn, W., Euwema, M.C., Schaufeli, W.B. and Deprez, J. (2020), "Leaders, teams and work engagement: a basic needs perspective", *Career Development International*, Vol. 24(4), 373-388. <https://doi.org/10.1108/CDI-06-2019-0150>.
- Rustiarini, N. W., Bhagawati, D. A. S., Mendra, N. P. Y., and Vipriyanti, N. U. (2023). "Resource orchestration in enhancing green innovation and environmental performance in SME". *International Journal of Energy Economics and Policy*, 13(5), 251–259. <https://doi.org/10.32479/ijeep.14725>.
- Singh, S. K., Del Giudice, M., Chierici, R., and Graziano, D. (2020). "Green innovation and environmental performance: The role of green transformational leadership and green human resource management". *Technological Forecasting and Social Change*, 150, 119762.
- Sobaih, A. E. E., Hasanein, A. M., Aliedan, M. M., and Abdallah, H. S. (2020). "The impact of transactional and transformational leadership on employee intention to stay in deluxe hotels: Mediating role of organisational commitment". *Tourism and Hospitality Research*, 22(3), 146735842097215. <https://doi.org/10.1177/1467358420972156>.
- Suliman, M. A., Abdou, A. H., Ibrahim, M. F., Al-Khaldy, D. A. W., Anas, A. M., Alrefae, W. M. M., and Salama, W. (2023). "Impact of green transformational leadership on employees' environmental performance in the hotel industry context: Does green work engagement matter?" *Sustainability (Switzerland)*, 15(3). <https://doi.org/10.3390/su15032690>
- Sun, X., El Askary, A., Meo, M. S., Zafar, N. ul A., and Hussain, B. (2022). "Green transformational leadership and environmental performance in small and medium enterprises". *Economic Research-Ekonomska Istrazivanja*, 35(1), 5273–5291. <https://doi.org/10.1080/1331677X.2021.2025127>
- Susanto, M. P., Rokhyadi, A., Saputra, P., Firsalam, A. F., and Rahmah, A. N. (2024). "The effect of employee green involvement, green motivation, and green behavior on green business performance in textile companies in Indonesia". *International Research Journal of Science, Technology, and Management*, 4(2), 35. <https://doi.org/10.5281/zenodo.12730231>.
- Úbeda-García, M., Marco-Lajara, B., Zaragoza-Sáez, P. C., Manresa-Marhuenda, E., and Poveda-Pareja, E. (2022). "Green ambidexterity and environmental performance: The role of green human resources". *Corporate Social Responsibility and Environmental Management*. <https://doi.org/10.1002/csr.2171>.
- Wiredu, J., Yang, Q., Inuwa, U. L., and Sampene, A. K. (2023). "Energy transition in Africa: The role of human capital, financial development, economic development, and carbon emissions". *Environmental Science & Policy*, 146, 24–36. <https://doi.org/10.1016/j.envsci.2023.04.021>.
- Xu, L., Mohammad, S. J., Nawaz, N., Samad, S., Ahmad, N., and Comite, U. (2022). "The role of CSR for de-carbonization of hospitality sector through employees: A leadership perspective". *Sustainability (Switzerland)*, 14(9). <https://doi.org/10.3390/su14095365>

- Younis, Z., and Hussain, S. (2023). "Green transformational leadership: Bridging the gap between green HRM practices and environmental performance through green psychological climate". *Sustainable Futures*, 6. <https://doi.org/10.1016/j.sftr.2023.100140>
- Yulk, G.A. (2013). *Leadership in organizations*. (8^a ed., pp. 2). Prentice-Hall. Upper Saddle River.
- Zhang, W., Xu, F., and Wang, X. (2020). "How green transformational leadership affects green creativity: Creative process engagement as intermediary bond and green innovation strategy as boundary spanner". *Sustainability (Switzerland)*, 12(9). <https://doi.org/10.3390/su12093841>
- Zhao, W., and Huang, L. (2022). "The impact of green transformational leadership, green HRM, green innovation and organizational support on the sustainable business performance: Evidence from China". *Economic Research-Ekonomska Istrazivanja*, 35(1), 6121–6141. <https://doi.org/10.1080/1331677X.2022.2047086>.
- Zhu, J., Tang, W., Zhang, B., and Wang, H. (2022). "Influence of environmentally specific transformational leadership on employees' green innovation behavior: A moderated mediation model". *Sustainability (Switzerland)*, 14(3). <https://doi.org/10.3390/su14031828>.

Recovering Together: A Moderated Mediated Analysis of Co-Created Recovery on Repatronage Intentions

Kyrie Eleison Muñoz, Aldrin Agasen and Mark Chris Lapuz

National University, Manila, Philippines

keamunoz@national-u.edu.ph

acagasen@national-u.edu.ph

mcmlapuz@nu-baliwag.edu.ph

Abstract: Service failures can significantly impact hotel customers' loyalty, often leading to negative re-patronage intentions. However, how service recovery efforts are designed and implemented is crucial in mitigating these adverse effects. Co-created service recovery, where customers actively participate in solving service failures, has emerged as a critical strategy to improve customers' subsequent behaviours. Drawing on the value co-creation theory, this study investigates the moderating effect of co-created service recovery on customers' responses to service failures and their subsequent re-patronage intentions. A two-phase quasi-experimental study was conducted to determine the effectiveness of co-created service recovery relative to customers' aversion, distrust, and negative re-patronage intentions. Quantitative data was obtained from 153 purposively sampled participants. Data was analysed using a t-test and moderated mediation analysis using Model 14 in PROCESS macro. The findings suggest that when customers perceive their input as valued during recovery efforts, they are less likely to be aversive and distrustful towards the hotel. In turn, their negative re-patronage intentions are reduced. These findings provide important insights for hotel managers on enhancing co-creation as a service recovery strategy to improve customer loyalty and retention.

Keywords: Service failure, Service recovery, Value co-creation, Hospitality, Service-dominant logic

1. Introduction

Behavioural intentions have become an essential concept in tourism and hospitality (T&H) literature as consumers' decision-making, satisfaction, and repatronage have been widely accepted as a measure to determine the success of T&H businesses (Afshardoost & Eshaghi 2020; Chen & Tsai 2007; Prayag et al, 2013). The prevalence of innovative technologies in the T&H industry has challenged the current understanding of behavioural intentions as the adoption of digital tools such as artificial intelligence, augmented reality, virtual reality, robots, and smartphone applications have influenced customers considerably over the past decade (Yung & Khoo-Lattimore 2019).

However, more studies are needed to investigate users' behavioural responses to emerging digital technologies during co-created service recovery. Research on service failure has focused mainly on the service provider delivering recovery strategies, leaving customers' role in co-creating service recovery relatively unexplored in T&H settings (Shams et al, 2021). Co-created service recovery responses are an emerging strategy in T&H businesses where digital technologies are embedded (Bagherzdeh et al, 2020). As the term implies, co-created service recovery is a strategy where customers and providers jointly participate in addressing service failures. Past studies in T&H have examined the impacts of such strategies on customer satisfaction, loyalty, and other behavioural outcomes (e.g., Kim & Baker 2020; Zhang et al, 2021).

This gap presents an opportunity to examine the influence of co-created service recovery strategies on behavioural intentions to develop customer retention in the context of human-technology interactions in T&H settings. As such, this paper employs a two-phase quasi-experimental study to answer the research question, "How does co-created service recovery moderate the influence of customers' response to service failures towards negative repatronage intentions?" This study extends the Value Co-creation Theory to advance the understanding of how co-created service recovery strategies can drive deeper customer engagement and retention in the context of digital T&H platforms.

2. Literature Review and Hypothesis Development

2.1 Value Co-creation Theory and Service Recovery

Value co-creation theory emphasises that customers are not passive recipients of services but active contributors to the service process, co-creating value through their interactions with service providers (Vargo & Lusch 2008). Co-creation is the collaborative process of forming a relationship between the customer and the service provider (Roggeveen et al, 2012). This concept is rooted in Service-Dominant Logic, which posits

that customers must integrate their resources with the organisation's resources to optimise value creation (Vargo & Lusch, 2004).

In the context of service failures, co-created service recoveries tend to be faster and more effective. This is because of customers' active involvement and participation in solving the issues concerning their experiences (Jin et al, 2019). As key players in this process, customers are willing to act as resource integrators in the co-recovery process. While customer co-creation generally involves customer engagement within service systems, service recovery co-creation is a more recent concept. It refers to the customer's ability to influence or customise the recovery process through collaboration with the service provider (Bakhsh & Riivits-Arkonsuo 2022). This is particularly true in T&H services, often designed to foster customer participation to drive value co-creation (Rather et al, 2019). Past research demonstrated that co-created service recovery enhanced overall service experience, customer retention, and the growth of businesses (Shams et al, 2021).

2.2 Service Failure

A service failure in the hospitality and tourism industry may implicate dissatisfaction and avoidance of repurchasing or revisiting behaviour, reducing the level of confidence that threatens the business's survival (Akarsu et al, 2022). The same study identified various considerations to overcome service failures, such as service recovery strategies, recovery efforts, pre- and post-failure, and post-recovery contingencies. While emotional labour, rumination, and satisfaction recovery were distinguished as sub-themes. Since service failures are guaranteed to happen (Huang et al, 2022; Hart et al, 1990), T&H businesses strive to formulate innovative and impactful pre- and post-service recovery methods to prevent and mitigate its effects (Dong, 2020). Moreover, through a text-mining approach, Huang et al (2022) also stressed how significant it is to understand the techniques for dealing with various types and groups of customers. Thus, loyalty and scarcity of service play pivotal roles in how the customer responds to service recovery (Kim et al, 2021). A combination of monetary and non-monetary service recovery is more effective than a single effort of the establishment (Fu et al 2015). However, the appreciation and satisfaction of the customers with the company's efforts vary in their emotional response (Valentini et al, 2020; Smith et al, 2002).

2.3 Customer Response

During the service recovery, the customers may express negative emotional responses, such as aversion and distrust. This becomes evident through their behaviour and mediates the relationship between perceived injustice and satisfaction (Balaji et al, 2017). Ashwini et al (2022) emphasise the greater risk of aversion from dissatisfied or frustrated customers with the service failure. Conversely, customers may feel relief or even thankful if the recovery is handled correctly and they can secure and reestablish their promise (Valentini et al, 2019; Bakar et al, 2020). On the contrary, when service failures are managed mediocly, this may lead to distrust, irritation, and negative reviews of the establishment (Theron 2019; Weun et al, 2004). Customers also exhibit greater dissatisfaction and anger towards technology-mediated intervention than traditional employees' intervention (Chen et al., 2020). Additionally, anger and dissatisfaction are key emotive antecedents leading to consumer behaviours such as exit, a voice-out, and revenge (Li & Stacks, 2017).

Though positive and negative experiences affect customers' trust and revisit intention, negative emotions are more significant and have a more substantial impact (Han, 2005). Customers who observed and experienced severe service failure show aversion, negatively affecting the re-patronage's intentions and attitude towards hotels (Sreejesh & Anusree, 2016). Another study indicated that revisit intention is mediated by service and relation quality, which includes satisfaction and trust (Sadeghi et al, 2017), and may also be construed through the opposite lens. While AI-based services like chatbots have recently been explored and employed in hotel service, the recovery efforts led to a decline in customer satisfaction and revisit intention (Zhu et al, 2023).

H1. Service Failures (SF) significantly influence customers' aversion (AV) towards the hotel.

H2. SF significantly influences customers' distrust (DT) towards the hotel.

H3. AV significantly influences customers' negative intentions (NI) towards the hotel.

H3a. AV mediates the relationship between SF and NI.

H4. DT significantly influences customers' NI towards the hotel.

H4a. DT mediates the relationship between SF and NI.

2.4 Co-created Service Recovery (CR)

Jasenko et al (2022) suggest that to compensate for the customer's negative emotions, the efforts would be better if coupled with co-creation or collaboration with the customers. Value co-creation can be categorised based on customer cooperation in implementing service recovery. First is mandatory customer participation, where the customers can only make the effort. Furthermore, replaceable customer participation is an activity that the service provider can perform. Lastly, voluntary customer participation is an activity that is not essential in service encounters but is performed by customers to enhance the service experience (Dong & Sivakumar, 2016). This approach garnered mixed effects. Wherein Alotaibi et al (2023) discuss that customer participation enhances perceived value and satisfaction, contrary to the study of Van Vaerenbergh et al (2018), where co-creation in service recovery is generally weak and more beneficial to people with Eastern cultural backgrounds.

Tang et al (2021) stress that the intensity of adverse reactions affects the efficacy of service recovery efforts, and the co-creation of the service recovery is influenced by the interaction with the hotel staff (Uslu & Tosun 2021). Moreover, co-creation efforts significantly and positively impact customer satisfaction, leading to revisiting and repurchasing intention (Monteiro et al, 2023; Maryani et al, 2020). The positive responses in service recovery mediate the intention of the customers to revisit (Latif & Lanxia 2019; Guo et al, 2016), thus, can hypothetically construe to its adverse perspective.

H5a. CR moderates customers' AV towards NI.

H5b. CR moderates customers' DT towards NI.

3. Materials and Methods

This study employs a two-phase quasi-experimental study. In Phase 1, a t-test was conducted to determine the effectiveness of the intervention CR using pre- and post-tests. Phase 2 employed a moderated mediation analysis using PROCESS Model 14 to assess the impact of SF on customers' responses to AV, DT, and NI and the moderating effect of CR.

A total of 153 participants, summarised in Table 1, were conveniently sampled from previous guests of a chosen hotel. The experiment involved participants interacting with a virtual front desk agent in an augmented reality simulation using HyperSkill. These participants gave consent to participate in a simulated laboratory experiment. Ethical clearance was obtained, and confidentiality and risk reduction protocols were enforced before the experiment commenced.

Table 1: Participants' Demographic Profile (N = 153)

	<i>n</i>	%
Sex		
Female	78	50.9
Male	75	49.1
Generation		
18-25	57	37.2
26-45	52	33.9
46 and up	44	28.9
Occupation Status		
Employed Full-Time	75	49.0
Employed Part-Time	28	18.3
Student	26	16.9
Unemployed	24	15.8

The simulation showed a scenario where the front desk agent tells the participant that their booking cannot be accommodated because the hotel has no vacancy (Xu et al, 2014). A survey prompted the participants to rate the SF, AV, DT, and NI. Then, the simulation proceeded to a co-created service recovery scenario where the front desk agent apologised and asked to solve the service failure by looking over available rooms on the

Internet together (Bagherzadeh et al, 2020). After this, another survey prompted the participants to evaluate the service recovery intervention, AV, DT, and NI.

Data was obtained from a survey questionnaire consisting of existing validated scales to measure AV, DT, NI, and CR. The variables were gauged from the indicators adapted from preceding studies: AV (Muhammad et al, 2019), DT (Radu et al, 2019), NI (Harrison-Walker, 2019), and CR (Liao 2007). The questionnaire utilised a 5-point Likert scale with a corresponding verbal interpretation of 5 = Strongly Agree, 4 = Agree, 3 = Neither Disagree nor Agree, 2 = Disagree, and 1 = Strongly Disagree where the respondents evaluated their reactions based on the given scenario. The researchers employed a 5-point scale in measuring attitude and reactions since odd choices provide better reliability (Adelson & McCoach 2010; Kusmaryono et al, 2022).

4. Results

4.1 Phase One

A t-test was conducted to compare the participants' behaviour before and after the service recovery intervention. The results in Table 2 illustrate a visible and significant change in participants' behaviour before and after the intervention. This was tested using a paired samples t-test for AV ($t = 2.37, p < .01$), DT ($t = 2.29, p < .001$), and NI ($t = 2.86, p < .05$).

Table 2: Effectiveness of Technology-mediated Service Recovery

	Before Service Recovery	After Service Recovery
AV	2.47	2.21
DT	3.19	2.93
NI	3.25	2.88

4.2 Phase Two

The regression analysis results to determine the predictive value of Model 1 SF on AV ($F = 14.36, p < .001, R^2 = .17$) and Model 2 DT ($F = 16.21, p < .001, R^2 = .19$). Similarly, regression analysis was conducted on Model 3 and 4, which determined the effects of AV on NI ($F = 14.36, p < .001, R^2 = .17$) and DT on NI ($F = 14.36, p < .001, R^2 = .17$) respectively. All four hypotheses were accepted, as shown in Table 3.

Table 3: Regression Analysis

Hypotheses	β	t-Value	p-Value	Remarks
H1: SF $\rightarrow$ AV	0.34	8.36	.000***	Accepted
H2: SF $\rightarrow$ DT	0.36	8.72	.000***	Accepted
H3: AV $\rightarrow$ NI	-0.48	-2.80	.005**	Accepted
H4: DT $\rightarrow$ NI	0.65	4.49	.000***	Accepted

Note. * $p < .05$. ** $p < .01$. *** $p < .001$.

A moderated mediation analysis used Model 14 in PROCESS macro (Hayes, 2022). These results, shown in Table 4, include SF as an independent variable, AV and DT as mediators, CR as a moderator, and NI as the dependent variable. Conditional indirect effects indicate that AV and DT mediate the relationship between SF and NI when CR is high. The index of moderated mediation was significant for SF $\rightarrow$ AV $\rightarrow$ NI (index = 0.50, Boot SE = 0.02, 95% CI [0.0172, 0.0860] and SF $\rightarrow$ DT $\rightarrow$ NI (index = -0.39, Boot SE = 0.02, 95% CI [-0.0736, -0.0093]. CR moderates the relationships between AV and NI (path b: Effect = 0.15, $t = 3.19, p < .01$) and DT and NI (path b: Effect = -0.11, $t = -2.62, p < .01$). These findings provide support for H3a, H3a, H5a, and H5b.

Table 4: Moderated-Mediated Analysis

IV	DV	W	a1	a2	b	c'	Effect	Lower CL	Upper CL
NI	AV	CR	0.34	0.15	-0.48	0.06	0.50*	0.02	0.09
	DT	CR	0.36	-0.11	0.65	0.06	-0.39*	-0.070	-0.01

a1. Effect of IV on M; a2. Effect of interaction between IV and M on W; b. Effect of M on DV; c'. Direct effect of IV on DV; * $p < .05$.

5. Discussions and Conclusions

This study addresses the limited literature on co-created service recovery responses in T&H businesses where digital technologies are embedded. A quasi-experimental study was conducted on 153 participants to reveal significant contributions and implications. The results provide essential insights for theory and practice. The t-test results from Phase 1 confirm the positive effect of CR after service failures. Post-intervention results suggest a significant decrease in AV, implying that customers are less likely to avoid the service or express a strong dislike for the hotel after the CR efforts. This demonstrates that collaboratively addressing service failures can rebuild trust with the service provider after SF (Alotaibi et al, 2023; Vargo & Lusch 2008).

Similarly, customers reported significantly reduced DT when CR interventions were implemented. This aligns with past studies illustrating that involving customers in the service recovery process restored their trust in the service provider and became a critical factor in rebuilding customer relationships (e.g., Collier et al, 2017; Jasenko et al, 2022). The results also reveal that customers' NI decreased following the CR intervention. This illustrates the effectiveness of CR in mitigating negative word-of-mouth or discontinuing service use because of the SF. In this vein, hotel managers and customers should collectively work to resolve the issue, reinforcing value co-creation by turning a negative experience into an opportunity to enhance the service relationship.

In Phase 2, the results of the regression analysis confirm the influence of SF towards negative customer behavioural intentions AV and DT (e.g., Akarsu et al, 2022; Ashwini et al, 2022). Specifically, results suggest that SF has a significant impact on AV. This implies that SF leads customers to develop a dislike or avoidance of the hotel. This is particularly concerning in the hospitality industry, where customer experience is paramount. Increased AV can decrease the likelihood of repeat business and deter potential customers through negative word-of-mouth. In the same light, SF contributes to heightened DT, indicating that customers may lose confidence in the hotel's ability to provide reliable service. DT can have long-term implications; it can be challenging to regain once lost (Zhu et al, 2023). Hotels must address the immediate issues caused by service failures and work actively to rebuild trust through transparency and consistent communication (Kim & Zhang 2021).

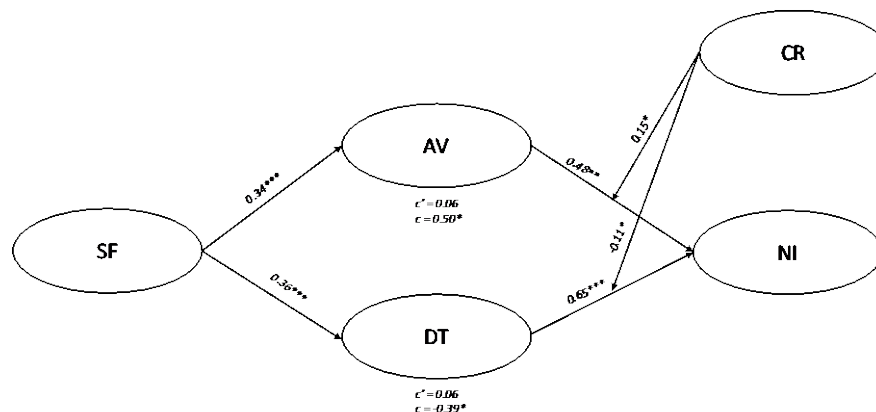


Figure 1: Moderated Mediation Model

The results also confirm previous research that AV and DT lead to NI (e.g., Theron 2019; Sadeghi et al, 2017). In this study, AV has a significant negative impact on NI. This means that the more customers experience feelings of AV, the fewer negative intentions they are likely to have. When faced with an unpleasant experience, customers might prefer to just avoid the hotel again instead of dealing with the emotional labour of expressing dissatisfaction or acting on negative behaviours (Simillidou et al, 2020). Similarly, DT has a significant impact on NI. Even if a hotel attempts to rectify a service failure, customers with high DT are likelier to cease their relationship with the hotel. Therefore, hotel managers should engage with customers through value co-creation, such as CR, to minimise customers' emotional strain and feel connected in solving the service failure.

The novelty of the study lies in the moderated mediation analysis. The results reveal that CR strengthens the relationship between AV and NI while weakening the relationship between DT and NI. The positive effect of CR on the relationship between AV and NI indicates that higher levels of CR intensify customers' negative emotions. Despite high CR efforts, the negative feelings associated with the SF might persist, causing customers to hold onto NI. From a value co-creation perspective, this outcome highlights a critical disconnect in the recovery process. This contradicts previous literature, which argues that service recovery efforts lessen

feelings of AV and NI (e.g., Chang & Cheng 2021). In this study, customers' AV could have been caused by an emotional response, such as frustration or anger, which are more challenging to diffuse (Kim et al, 2021; Tan & Li 2023). In this case, CR efforts are perceived as inadequate and thus amplify AV. This breakdown in co-creation occurs when customers' emotional needs are not adequately addressed, even if the service provider invests considerable effort in recovery (Rather et al, 2019).). As an implication for practitioners, CR efforts should be aligned with the customer's emotional needs, such as showing more empathy and remorse.

On the contrary, results also indicate that high levels of CR weaken the impact of DT on NI. This implies that CR more effectively addresses cognitive feelings such as DT by providing reassurance, explanations, and clear evidence of corrective actions during CR (Jamal & Bucklin 2016). Value co-creation emphasises the importance of mutual engagement and active participation in recovery efforts to restore the value of the service relationship (Jin et al, 2019). As such, hotel managers should bank on CR so customers' negative behavioural intentions are reduced and stronger customer relationships are fostered. Such CR efforts elucidate the service provider's reliability and competence, reducing the customer's NI. This aligns with past studies, which posit that SF strategies can mitigate negative DT and NI (Borah et al, 2019).

Acknowledgements

The authors thank the National University, Philippines, for supporting and funding this research.

References

- Adelson, J.L. & McCoach, D.B. (2010) "Measuring the mathematical attitudes of elementary students: The effects of a 4-point or 5-point Likert-type scale", *Educational and Psychological Measurement*, Vol. 70, No. 5, 796–807. <https://doi.org/10.1177/0013164410366694>
- Akarsu, T. N., Marvi, R., & Foroudi, P. (2022) "Service failure research in the hospitality and tourism industry: a synopsis of past, present and future dynamics from 2001 to 2020", *International Journal of Contemporary Hospitality Management*, Vol. 35, No. 1, pp. 186-217.
- Alotaibi, M.N., Chaouali, W., Mjahed Hammami, S., Schoefer, K., Aloui, N. and Abdulhamid Saleh, M. (2023) "Is customer participation always good in service recovery? The moderating role of customers' positive psychological capital", *International Journal of Bank Marketing*, Vol. 41, No. 3, pp. 457-484. <https://doi.org/10.1108/IJBM-03-2022-0101>
- Awasthi, A.K., Kumar, V. (2022) "Behavioural consequences of verbally expressed and unexpressed customer rage emotions", *Journal of Consumer Marketing*, Vol. 39, No. 1, pp. 133–144. doi: 10.1108/jcm-08-2020-4024
- Bakhsh, N.N. & Riivits-Arkonsuo, I. (2022) "The Value Co-creation Through Joint Failure Recovery: B2B Settings" *Journal of Creating Value*, Vol. 8, pp. 45-57. doi: 10.1177/23949643221086463
- Borah, S.B., Prakhya, S., & Sharma, A. (2019) "Leveraging service recovery strategies to reduce customer churn in an emerging market", *Journal of the Academy of Marketing Science*. doi:10.1007/s11747-019-00634-0
- Chang, K. C., & Cheng, Y. S. (2021) "How online service recovery reviews influence behavioral intentions in the hospitality context: Regulatory focus and loss aversion perspectives", *Journal of Hospitality and Tourism Management*, Vol. 46, pp. 440-455.
- Chen, N., Mohanty, S., Jiao, J. & Fan, X. (2020) "To err is human: Tolerate humans instead of machines in service failure" *Journal of Retailing and Consumer Services*. <https://doi.org/10.1016/j.jretconser.2020.102363>
- Collier, J.E., Breazeale, M., & White, A. (2017) "Giving back the "self" in self service: customer preferences in self-service failure recovery" *Journal of Services Marketing*, Vol. 31, 604-617. <https://doi.org/10.1108/JSM-07-2016-0259>
- Dong, B., & Sivakumar, K. (2017) "Mandatory Customer Participation in Services: Domain, Scope and Boundaries" *Journal of the Academy of Marketing Science*, Vol. 45, No. 6, pp. 944-965. <https://doi.org/10.1007/s11747-017-0524-y>
- Dong, T. (2020, September 10) *Hotel Recovery Indicators and Need for Scenario-based Strategies*. Retrieved August 8, 2024, from <https://hsmasia.org/2020/09/10/hotel-recovery-indicators-and-the-need-for-scenario-based-strategies/>
- Fu, H., Wu, D.C., Huang, S., Song, H., & Gong, J. (2015) "Monetary or nonmonetary compensation for service failure? A study of customer preferences under various loci of causality", *International Journal of Hospitality Management*, Vol. 46, pp. 55–64. doi:10.1016/j.ijhm.2015.01.006
- Guo, L., Lotz, S.L., Tang, C., & Gruen, T.W. (2016) "The Role of Perceived Control in Customer Value Cocreation and Service Recovery Evaluation", *Journal of Service Research*, Vol. 19, No. 1, 39-56. <https://doi.org/10.1177/1094670515597213>
- Han, H. (2005) "The Impact of Emotion on the Formation of Customers' Repeat Visit Intention in the Lodging Industry" [Masters Thesis, Dankook University]. Retrieved August 5, 2024 from <https://core.ac.uk/download/pdf/5164194.pdf>
- Harrison-Walker, L. J. (2019) "The critical role of customer forgiveness in successful service recovery", *Journal of Business Research*. doi:10.1016/j.jbusres.2018.07
- Hart, C.W.L., Heskett, J.L., Sasser, W.E. (1990) "The profitable art of service recovery", *Harvard Business Review*, Vol. 68, pp. 148–156.
- Huang, S., Liang, L.J., & Choi, H.C. (2022) "How We Failed in Context: A Text-Mining Approach to Understanding Hotel Service Failures", *Sustainability*, Vol. 14, pp. 2675. <https://doi.org/10.3390/su14052675>

- Jamal, Z., & Bucklin, R.E. (2006) "Improving the diagnosis and prediction of customer churn: A heterogeneous hazard modeling approach", *Journal of Interactive Marketing*, Vol. 20, No. 3-4, pp. 16–29. doi:10.1002/dir.20064
- Kim, H., & Jang, S. S. (2021) "Is differential treatment in response to service failures effective? The roles of comparison, loyalty, and scarcity messages", *International Journal of Hospitality Management*, Vol. 95, pp. 102952.
- Jasenko, A., Bo, E., Tobias, O., Bård, T. (2022) "Money for Nothing: The Impact of Compensation on Customers' Bad-Mouthing in Service Recovery Encounters", *Marketing Letters*, Vol. 34, No. 1, pp. 69-82. doi: 10.1007/s11002-021-09611-6
- Jin, D., DiPietro, R. B., & Fan, A. (2020) "The impact of customer controllability and service recovery type on customer satisfaction and consequent behavior intentions", *Journal of Hospitality Marketing & Management*, Vol. 29, No. 1, pp. 65-87.
- Kim, J.-H., Guo, J., & Wang, Y. (2021) "Tourists' negative emotions: antecedents and consequences", *Current Issues in Tourism*, pp. 1–19. doi:10.1080/13683500.2021.1935
- Kusmaryono, I., Wijayanti, D., & Maharani, H.R. (2022) "Number of Response Options, Reliability, Validity, and Potential Bias in the Use of the Likert Scale Education and Social Science Research: A Literature Review", *International Journal of Educational Methodology*, Vol. 8, No. 4, pp. 625-637. <https://doi.org/10.12973/ijem.8.4.625>
- Latif, M.S., & Lanxia, Z. (2019) "The Impact of Service Recovery on Repurchase Intentions: A Moderated Mediation Model", *Journal of Research in Administrative Sciences*, Vol. 8, No. 1, pp. 10-25. doi: 10.47609/JRAS2019V8I1P3
- Li, Z.C., & Stacks, D.W. (2017) "When the relationships fail: A microperspective on consumer responses to service failure", *Journal of Public Relations Research*, Vol. 29, pp. 158-175. <https://doi.org/10.1080/1062726X.2017.1356310>
- Liao, H. (2007) "Do it right this time: The role of employee service recovery performance in customer-perceived justice and customer loyalty after service failures", *Journal of applied psychology*, Vol. 92, No. 2, pp. 475. DOI: 10.1037/0021-9010.92.2.475
- Maryani, S., Fitriyani, A., Setiawan, E.B., & Octora, Y. (2020) "The Effect of Co-Creation Service Recovery Against Repurchase Intention Mediated by Customer Satisfaction Service in Lion Air in Jakarta", *Global Research on Sustainable Transport and Logistics*, Vol. 3, pp. 776-783. doi: 10.25292/ATLR.V3I0.338
- Monteiro C, Franco M, Meneses R, Castanho RA. (2023). Customer Co-Creation on Revisiting Intentions: A Focus on the Tourism Sector. *Sustainability*. 15(21):15261. <https://doi.org/10.3390/su152115261>
- Muhammad, L. and Gul-e-Rana, G.-e. (2019) "Do service firm employee and customer relations matter for customer forgiveness in service recovery?", *Asia Pacific Journal of Marketing and Logistics*, Vol. 31 No. 4, pp. 1216-1232. <https://doi.org/10.1108/APJML-09-2018-0355>
- Radu, A.G., Arli, D., Surachartkumtonkun, J., Weaven, S. and Wright, O. (2019) "Empathy and apology: the effectiveness of recovery strategies", *Marketing Intelligence & Planning*, Vol. 37 No. 4, pp. 358 - 371. <https://doi.org/10.1108/MIP-03-2018-0080>
- Rather, R.A., Hollebeek, L.D., & Islam, J.U. (2019) "Tourism-based customer engagement: The construct, antecedents, and consequences", *The Service Industries Journal*, Vol. 39, No. 7-8, pp. 519-540.
- Roggeveen, A.L., Tsiros, M., & Grewal, D. (2012) "Understanding the Co-Creation Effect: When Does Collaborating with Customers Provide a Lift to Service Recovery?" *Journal of the Academy of Marketing Science*, Vol. 40, pp. 771-790. <https://doi.org/10.1007/s11747-011-0274-1>
- Sadeghi, M., Zandieh, D., Mohammadi, M., Yaghoubibijarboneh, B., & Nasrolahi Vosta, S. (2016) "Investigating the impact of service climate on intention to revisit a hotel: the mediating role of perceived service quality and relationship quality", *International Journal of Management Science and Engineering Management*, Vol. 12, No. 1, pp. 12–20. doi:10.1080/17509653.2015.1113395
- Shams, G., Rather, R., Abdur Rehman, M., & Lodhi, R. N. (2021) "Hospitality-based service recovery, outcome favourability, satisfaction with service recovery and consequent customer loyalty: an empirical analysis", *International Journal of Culture, Tourism and Hospitality Research*, Vol. 15, No. 2, pp. 266-284.
- Shen, A., & Dwayne Ball, A. (2009) "Is personalization of services always a good thing? Exploring the role of technology-mediated personalization (TMP) in service relationships", *Journal of Services Marketing*, Vol. 23, No. 2, pp. 79–91. doi:10.1108/08876040910946341
- Simillidou, A., Christofi, M., Glyptis, L., Papatheodorou, A., & Vrontis, D. (2020) "Engaging in emotional labour when facing customer mistreatment in hospitality", *Journal of hospitality and tourism management*, Vol. 45, pp. 429-443.
- Smith, A. K., & Bolton, R. N. (2002) "The Effect of Customers' Emotional Responses to Service Failures on Their Recovery Effort Evaluations and Satisfaction Judgments", *Journal of the Academy of Marketing Science*, Vol. 30, No. 1, pp. 5–23. doi:10.1177/03079450094298
- Sreejesh, S., & Anusree, M.R. (2016) "The impacts of customers' observed severity and agreement on hotel booking intentions: the moderating role of web care and the mediating role of trust in negative online reviews" *Tourism Review*, Vol. 71, No. 2, pp. 77–89. doi:10.1108/tr-08-2015-0037
- Tan, K. P.-S., & Li, X. (Robert). (2024) "When Tourists are Angry or Fearful: (In)Effectiveness of Emotion Regulation in Changing Behavioral Intention", *Journal of Travel Research*, Vol. 63, No. 4, pp. 796-817. <https://doi.org/10.1177/00472875231173126>
- Tang, X., Chang, E.-C., Huang, X. & Zhang, M. (2018) "Timing and compensation strategies in service recovery", *Journal of Services Marketing*, Vol. 32, No. 6, pp. 755–766. <https://doi.org/10.1108/JSM-04-2017-0126>
- Theron, E. (2019) "When Service Recovery Goes Wrong – The Harmful Effect of Trust", Proceedings of the 10th Business and Management Conference. <https://doi.org/10.20472/bmc.2019.010.009>

- Uslu, A., & Tosun, P. (2024) "Tourist personality, value co-creation, and emotional well-being", *International Journal of Consumer Studies*, Vol. 48, No. 1, pp. e12995. <https://doi.org/10.1111/ijcs.12995>
- Valentini, S., Orsingher, C., & Polyakova, A. (2020) "Customers' emotions in service failure and recovery: a meta-analysis", *Marketing Letters*, Vol. 31, No. 2-3, pp. 199–216. doi:10.1007/s11002-020-09517-9
- Van Vaerenbergh, Y., Hazée, S. & Costers, A. (2018) "Customer participation in service recovery: a meta-analysis", *Marketing Letters*, Vol. 29, pp. 465–483. <https://doi.org/10.1007/s11002-018-9470-9>
- Vargo, S. L., & Lusch, R. F. (2008) "Service-dominant logic: continuing the evolution", *Journal of the Academy of marketing Science*, Vol. 36, pp. 1-10.
- Weun, S., Beatty, S. E., & Jones, M. A. (2004) "The impact of service failure severity on service recovery evaluations and post-recovery relationships", *Journal of Services Marketing*, Vol. 18, No. 2, pp. 133–146. doi:10.1108/08876040410528737
- Zhu, Y., Zhang, J., & Jifei, W. (2023) "Who did what and when? The effect of chatbots' service recovery on customer satisfaction and revisit intention", *Journal of Hospitality and Tourism Technology*, Vol. 14, No. 3, pp. 416 – 429. <https://doi.org/10.1108/JHTT-06-2021-0164>

Policy Approaches to Sustainable and Circular Economy Tourism: Comparative Case Studies of Japan and China

Koon Murakami

Faculty of Global and Media Studies, University of Nagasaki, Japan

kmurakami@sun.ac.jp

Abstract: This study compares Japan and China's tourism policies, focusing on sustainability and the circular economy. Post-COVID-19, the circular economy has emerged as a vital framework for sustainable tourism recovery. Using three criteria—efficient resource use, contributions to regional economies, and environmental and social well-being—this research evaluates policies through comparative case studies. Japan employs a decentralized approach, led by local governments and DMOs, emphasizing ecotourism and cultural preservation. China adopts a centralized, top-down approach, prioritizing large-scale infrastructure and digital technologies for policy efficiency. The findings reveal Japan's focus on long-term sustainability through community-driven, culturally sensitive policies, while China emphasizes rapid economic growth and tourism expansion through centralized planning. The study proposes a hybrid model integrating regional flexibility with centralized coherence to balance sustainability and economic growth. This research contributes to the discourse on sustainable tourism by analysing contrasting governance structures and their implications for policy-making.

Keywords: Sustainable tourism policy, Circular economy, Decentralized approach, Centralized approach, Comparative case study

1. Introduction

The tourism industry has long played a pivotal role in driving economic growth and fostering intercultural exchange. In 2019, tourism contributed approximately 10% of global GDP and served as a major source of employment (WTTC Economic Impact Report, 2019). However, the COVID-19 pandemic dealt an unprecedented blow to the sector. Border closures and travel restrictions caused a dramatic decline in tourist numbers, threatening the survival of numerous tourism-related businesses. This crisis exposed the vulnerabilities of traditional tourism models, underscoring the urgent need for sustainable frameworks that integrate economic benefits with environmental protection and community development.

In this context, the concept of the circular economy has emerged as a central pillar of tourism policy. This framework emphasizes efficient resource use, reinvestment in local economies, and the preservation of environmental and cultural assets. It provides a robust theoretical foundation for the sustainable development of the tourism industry, offering a fresh perspective for post-pandemic recovery while promoting long-term regional development.

This study conducts a comparative analysis of Japan and China, two countries with contrasting approaches to tourism governance, to examine the implementation of circular economy principles and sustainability practices. Japan employs a decentralized approach, led by local governments and Destination Management Organizations (DMOs), focusing on community-driven ecotourism and cultural preservation. In contrast, China adopts a top-down, centralized strategy, emphasizing large-scale infrastructure development and the integration of digital technologies to enhance efficiency and economic growth. By comparing these approaches, this study seeks to illuminate how tourism policies affect local communities, the environment, and the economy, contributing theoretical insights into the development of sustainable tourism models.

This research is guided by the following research questions:

RQ1. What policies have Japan and China implemented to support post-pandemic recovery in the tourism sector?

RQ2. What differences exist in the policy objectives, implementation methods, and resource allocation of the two countries?

RQ3. How can these policies be evaluated through the lens of circular economy principles and sustainability?

To address these questions, the study employs a case study approach, drawing on policy documents, statistical data, and existing literature. The analysis is structured around three evaluation criteria: (1) resource efficiency, (2) contributions to regional economies, and (3) environmental and social considerations. These criteria are used to assess the effectiveness and challenges of tourism policies in achieving sustainable development goals.

2. Rationale for Selecting Japan and China as Comparative Cases

Japan and China were selected for this study due to their significant roles in the global tourism industry and distinct approaches to integrating sustainability and circular economy principles.

First, their differing economic growth rates have shaped their tourism sectors in contrasting ways. As shown in Figure 1, China's GDP grew rapidly from 2009 to 2021, maintaining rates of 6–10% between 2010 and 2019, driving urbanization, industrial expansion, and tourism development. In contrast, Japan's slower economic growth has made tourism a key strategy for revitalizing regional economies. Comparing tourism policies in these contrasting contexts—high-growth versus low-growth economies—provides valuable insights into sustainable tourism strategies.

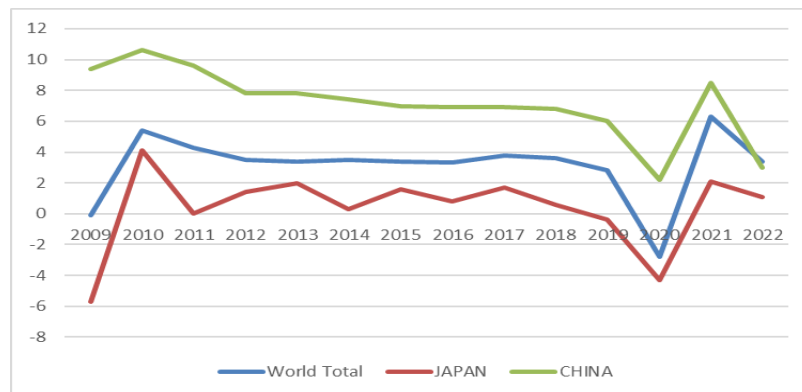


Figure 1: Trends in Real GDP Growth Rate (%)

The scale and growth patterns of tourism also differ significantly between the two countries. In 2019, Japan welcomed approximately 31.88 million international tourists, generating tourism revenues of about 4.8 trillion yen (approximately USD 44 billion). Meanwhile, China recorded 145 million outbound tourists, with expenditures amounting to USD 277 billion. While Japan focuses on promoting "high-value tourism" that prioritizes per-capita spending, China emphasizes a "mass tourism model" that targets tourist volume. These contrasting approaches reflect the strategic goals of their respective tourism policies, providing valuable insights for evaluating sustainability and circular economy initiatives.

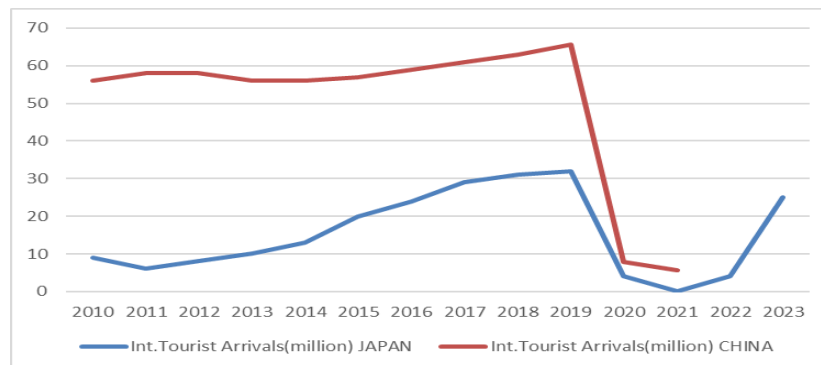


Figure 2: International Tourist Arrivals (million)

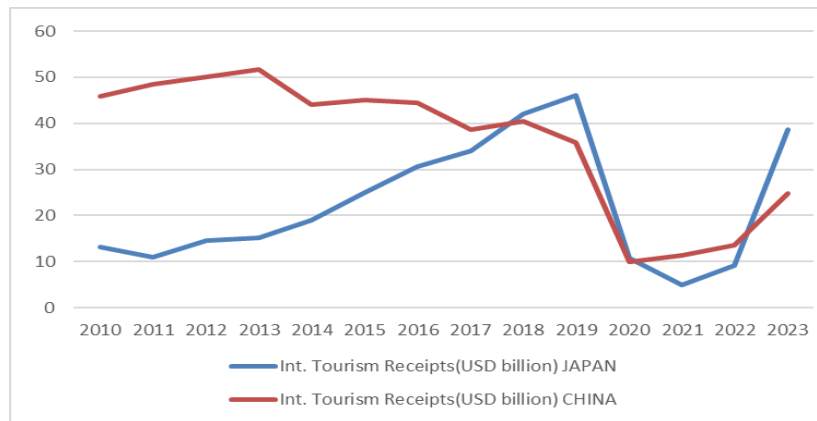


Figure 3: International Tourism Receipts (USD billion)

Source: United Nations World Tourism Organization (UNWTO), "Global and Regional Tourism Performance," accessed November 19, 2024. Available at <https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>. This source applies to Figures 1, 2, and 3.

In addition, the policy approaches of the two countries exhibit notable differences. Japan adopts a decentralized model, where local governments and Destination Management Organizations (DMOs) lead efforts to preserve regional resources and promote ecotourism. In contrast, China's centralized, top-down approach leverages digital technologies for smart tourism and prioritizes large-scale infrastructure development. These divergent strategies provide academically significant insights into how tourism policies can contribute to achieving sustainability and circular economy objectives.

By comparing these factors, this study aims to evaluate the effectiveness and challenges of tourism policies in Japan and China through the lenses of sustainability and the circular economy. This comparison seeks to deepen our understanding of decentralized models that emphasize regional flexibility and centralized models that ensure policy consistency. Furthermore, it explores the potential for a hybrid model that integrates the strengths of both approaches, offering novel perspectives for the design of future tourism policies.

3. Literature Review on Sustainable Tourism

In Japan, the tourism industry is positioned as a vital mechanism for balancing regional economic revitalization and environmental conservation. The "Tourism Nation Promotion Basic Plan" focuses on three pillars: 1) promoting ecotourism, 2) conserving regional resources, and 3) addressing overtourism. These policies aim to achieve sustainability by encouraging the local circulation of tourism revenues, aligning closely with the principles of the circular economy. This approach provides a comprehensive framework for fostering sustainable development in local communities (Japan Tourism Agency, 2023).

Academic research further supports Japan's tourism policies with robust theoretical models. Shikida and Morishige (2008) proposed the "autonomous dependency" model, which emphasizes the sustainable use of local resources while mitigating unregulated external exploitation. Imaizumi (2020) framed tourism as a tool for regional revitalization, presenting a policy model that balances economic benefits with environmental considerations. Arai (2022) responded to changes in tourism demand caused by COVID-19, advocating mechanisms to ensure that tourism revenues are redistributed to local communities. Collectively, these studies underscore Japan's integration of sustainability and circular economy principles in its tourism policies.

In contrast, China's "Domestic Tourism Enhancement Plan (2023–2025)" prioritizes the digitalization of tourist sites, the promotion of smart tourism, and the efficient management of tourism resources. These initiatives aim to harmonize increased tourism revenue with sustainability goals. "Smart tourism," in particular, employs AI and IoT technologies to enhance operational efficiency while supporting environmental conservation, marking a significant innovation in tourism policy (Ministry of Culture and Tourism, 2023).

Academic discussions on China's tourism policies reveal a multifaceted evaluation of their sustainability impacts. Han (2008) critically analysed China's emphasis on economic growth, highlighting its tendency to overlook environmental and social implications. Li (2018) identified the challenges of "instrumental sustainability," pointing out adverse effects on cultural and natural resources and advocating for a more holistic policy approach. Meng (2024), through case studies in ethnic minority regions, emphasized the critical

role of local community engagement in achieving sustainability. These studies suggest that while China's policies face challenges, they also demonstrate potential for pioneering solutions.

The circular economy framework offers a valuable lens for analysing the sustainability of tourism policies. Geissdoerfer et al. (2017) demonstrated that the circular economy model promotes efficient resource use, waste minimization, and reuse, making it highly relevant for sustainable economic systems. This framework is particularly applicable to tourism policy, enabling reductions in environmental impact and fostering the local circulation of tourism revenue. Moreover, the UNWTO's "Sustainable Tourism Indicators" provide practical tools for evaluating and improving tourism policies. These indicators assess sustainability from environmental, social, and economic perspectives, serving as a foundational resource for evaluating the tourism policies of Japan and China.

This study applies these theoretical frameworks and international perspectives to analyse Japan and China's tourism policies based on three evaluation criteria: 1) resource efficiency, 2) contributions to the local economy, and 3) considerations for environmental and social impacts. By employing these criteria, this research aims to comprehensively evaluate the policies' effects on local communities, the environment, and the economy, offering actionable insights for building a sustainable tourism industry.

4. Implementation of Circular Economy and Sustainability in Japan's Tourism Policies

Japan's tourism policies aim to foster sustainable tourism destinations through effective utilization of regional resources. These policies, led by the Japan Tourism Agency and Destination Management Organizations (DMOs), prioritize reducing environmental impact, fostering local economic circulation, and preserving cultural assets. They actively integrate elements of the circular economy and sustainability into their frameworks.

4.1 Selection Criteria for Case Studies

This study evaluates Japan's tourism policies by selecting case studies that meet the following criteria:

- Circular Economy: Efficient use of regional resources with economic and environmental sustainability.
- Sustainability: Tourism that preserves regional culture and natural environments.
- Public-Private Collaboration: Initiatives involving local governments, DMOs, tourism operators, communities, and private enterprises.

Based on these criteria, Niseko in Hokkaido and Miyama Town in Kyoto Prefecture were selected for analysis.

4.2 Niseko, Hokkaido: Renewable Energy and Ecotourism in Practice



Figure 4: Map showing the location of the Niseko area in Hokkaido

Source: Niseko Tourism Official Website, Access and Maps. Retrieved from <https://www.niseko-ta.jp/en/knowledge/access/>

Niseko, a leading ski resort in Japan, has gained international recognition as a pioneer in sustainable tourism development. This region is particularly popular among international visitors seeking high-quality powder snow and year-round natural landscapes. Niseko's sustainability initiatives align with global best practices, which can be categorized into three key areas:

1. Transportation Efficiency: Direct bus services between Sapporo and Niseko leverage VR technology, enhancing the travel experience while reducing carbon emissions through improved transit efficiency.

2. Electric Car Sharing: The adoption of autonomous electric vehicles not only enhances local mobility but also reduces the environmental impact by replacing traditional transportation options.
3. Commitment to Climate Action: In 2021, Niseko became the only Japanese municipality to sign the "Glasgow Declaration on Climate Action in Tourism," reinforcing its dedication to reducing carbon emissions and achieving net-zero targets.

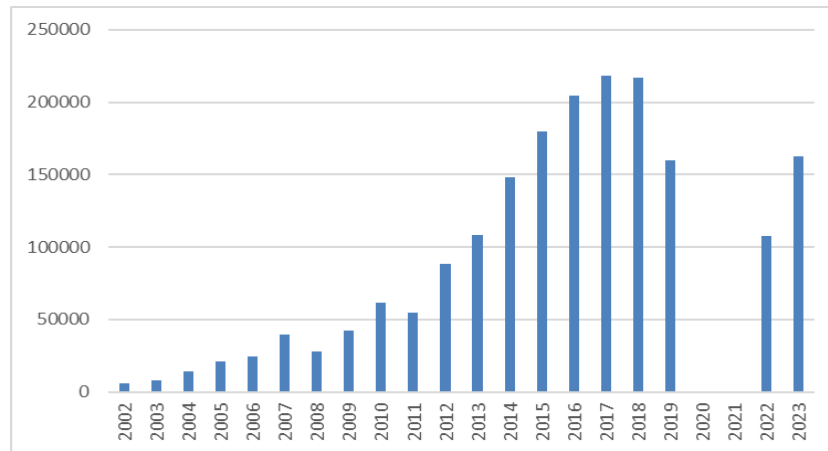


Figure 5: Trends in the Influx of Foreign Tourists

Source: Town of Niseko, Commerce and Tourism Division. (2023). *Tourist Influx Data for Niseko Town: Foreign Visitors Edition (FY2023: April 2023 – March 2024)*.

These initiatives have earned Niseko a spot in the "Top 100 Sustainable Tourism Destinations" for two consecutive years, demonstrating how renewable energy use and ecotourism can jointly advance environmental preservation and local economic revitalization.

4.3 Miyama Town, Kyoto Prefecture: A Fusion of Cultural Heritage and Ecotourism

Kyoto Prefecture, a key tourist hub in Japan, welcomed 12.12 million overnight visitors in 2023. Miyama Town, known for its traditional thatched-roof houses and sustainable tourism, draws 700,000 visitors annually despite its small population of 3,400. Designated as a Preservation District for Historic Buildings, it exemplifies cultural and environmental stewardship.



Figure 6: Map and depiction of the local scenery of Miyama, Kyoto Prefecture

Source: Miyama Navi. (n.d.). *About Miyama*. Retrieved from <https://miyamanavi.com/information/about-miyama>

Key initiatives in Miyama include:

- Introduction of Comprehensive Ecotourism Plans: Recognized as the first town in the Kinki region to implement a comprehensive ecotourism strategy in 2014, Miyama offers programs such as thatched-roof restoration workshops and local cooking classes, allowing visitors to actively engage with local culture and contribute to conservation.
- Participatory Tourism Models: Tourism programs position visitors as "partners in the community" rather than mere consumers, fostering deeper connections through activities such as agricultural experiences and preservation projects.

- **Local Economic Circulation:** Revenue generated from tourism supports local industries by utilizing regional agricultural products and crafts in tourism facilities, creating a sustainable economic model that benefits the entire community.
- **Environmental Impact Reduction:** Initiatives like the use of wood-burning stoves and hydroelectric power contribute to reducing the region's carbon footprint while enhancing long-term sustainability.

Miyama's efforts have garnered international acclaim, including being named one of the UNWTO's "Best Tourism Villages" in 2021 and receiving the Japan Tourism Award in 2023. The town serves as a model of integrating sustainable resource utilization, visitor-resident collaboration, and economic circulation.

4.4 Insights from Japan's Case Studies

The analysis of Japan's tourism policies reveals three key insights:

- **Sustainable Resource Use:** Long-term success in tourism depends on managing resources sustainably. Niseko reduces environmental impact and fosters economic growth through renewable energy and ecotourism, while Miyama focuses on cultural preservation and local economic benefits, adapting policies to regional needs for greater resilience.
- **Public-Private Collaboration:** Strong partnerships among governments, DMOs, residents, and private enterprises are essential. Miyama's community-driven efforts safeguard cultural and natural resources, enhancing its appeal as a sustainable destination.
- **Tourists as Contributors:** Involving tourists in conservation and cultural activities strengthens their connection to the region and directs tourism revenue toward sustainable development. Both Niseko and Miyama exemplify this model.

These insights offer practical guidance for global tourism policy design. The next section compares China's practices in circular economy and sustainability, examining shared challenges and varied solutions across different contexts.

5. Implementation of Circular Economy and Sustainability in China's Tourism Policies

China, a global leader in tourism, integrates circular economy and sustainability into its policies to meet growing domestic and international demand. Its top-down approach, coupled with digital technology, enhances operational efficiency and supports sustainable development. This section explores these principles in practice through two case studies: Shanghai's Steel Sculpture Art Park and Guizhou's Xijiang Qianhu Miao Village.

5.1 Criteria for Case Selection

The study selected case studies based on:

- **Policy Representativeness:** Highlighting key models of China's tourism policies for cross-regional comparisons.
- **Circular Economy Practices:** Demonstrating resource reuse, environmental conservation, and value creation through sustainable development.
- **Sustainability Impacts:** Evaluating tourism's effects on society, economy, and environment, including cultural preservation and poverty reduction.
- **Diversity:** Representing both urban and rural tourism contexts.

Shanghai's Steel Sculpture Art Park and Guizhou's Xijiang Qianhu Miao Village were chosen to reflect China's diverse strategies in urban and rural sustainable tourism.

5.2 Shanghai: Circular Economy through Adaptive Reuse of Industrial Heritage

Shanghai, China's economic hub with a 2024 population of 25 million and a 2023 GDP exceeding 4 trillion yuan, drives the nation's growth. The city promotes sustainable urban development, focusing on environmental conservation and energy efficiency. The Steel Sculpture Art Park exemplifies the integration of circular economy principles into urban tourism.



Figure 7: Location of the Landscape of the Steel Sculpture Art Park

Source: Official WeChat Account of the Shanghai Baoshan District People's Government

Key Features of the Steel Sculpture Art Park:

- **Innovative Reuse of Industrial Heritage:** Developed on the site of a former ferroalloy factory established in 1958, the park spans 53,000 square meters and features sculptures crafted from repurposed industrial materials. Its iconic centrepiece, Steel Sculpture No. 1, repurposes the factory's dust removal tower and functions as a symbol of industrial heritage.
- **Technological Integration:** The sculpture incorporates real-time PM2.5 air quality monitoring displayed on its chimney, merging environmental education with digital technology.
- **Community Engagement and Education:** Water-themed exhibits educate visitors about purification processes, while interactive features like ripple-inducing stepping stones symbolize harmony between humans and nature.
- **Multi-functional Spaces:** The park's expansive lawns and play areas serve both tourists and local residents, creating a space that fosters community development and recreational activities.

The Steel Sculpture Art Park serves as both a tourist attraction and community space, showcasing how circular economy principles can transform industrial waste into valuable assets. Its success highlights the potential of sustainability in urban development.

Shanghai's "Tourism 30 Measures" promote high-quality, sustainable tourism through initiatives like urban beautification, leveraging the Huangpu River, repurposing historic buildings, and encouraging suburban ecotourism. By integrating tourism with industries like industrial heritage and MICE, these policies enhance the city's sustainability and global competitiveness.

5.3 Xijiang Qianhu Miao Village: Cultural Preservation and Sustainable Tourism

Xijiang Qianhu Miao Village in Guizhou Province, China, is the largest Miao ethnic village, known for its wooden architecture, rich cultural heritage, and scenic landscapes. The "Xijiang Model," a collaborative effort between local governments and residents, integrates tourism development with cultural preservation and poverty alleviation.

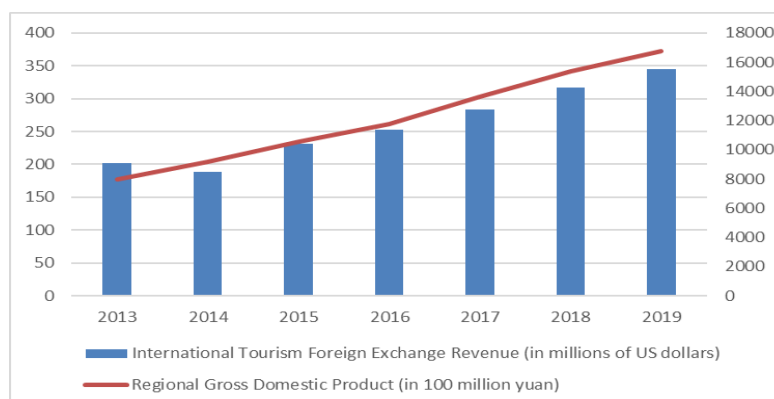


Figure 8: Economic and Tourism Indicators of a Region (2013-2019)

Source: National Bureau of Statistics of China (data.stats.gov.cn)

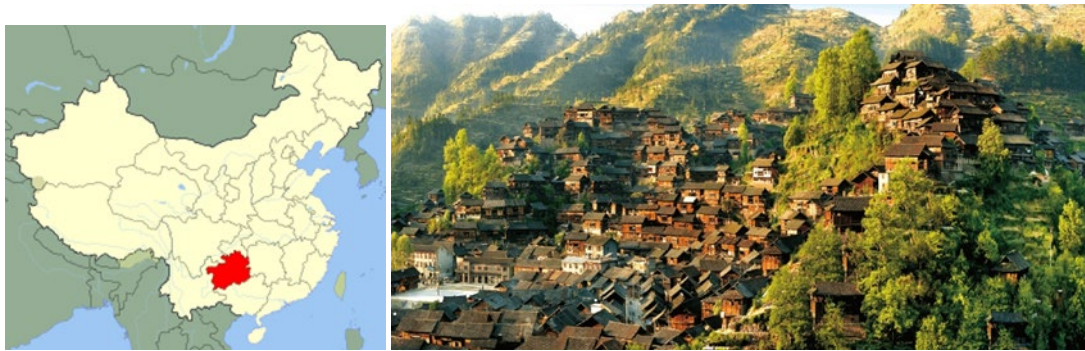


Figure 9: Location of Guizhou and the Landscape of Xijiang Qianhu Miao Village

Source: Guizhou Tourism Official Website. (n.d.). Map of Guizhou. Retrieved from <http://kishu-kanko.com/map.html>

In 2023, the village welcomed approximately 4.65 million visitors, generating significant economic benefits for the local community. Over 30,000 residents improved their livelihoods through tourism-related income, demonstrating the tangible impacts of sustainable tourism.

Key Initiatives of the Xijiang Model:

- **Direct Community Benefits:** Locally-run accommodations and restaurants ensure that tourism revenue remains within the community, directly benefiting residents.
- **Cultural Tourism Programs:** Interactive experiences, such as handicraft workshops and ethnic dance performances, enable tourists to engage with Miao culture while supporting its preservation.
- **Environmental Sustainability:** Measures such as ecotourism promotion, enhanced waste management, and renewable energy adoption underscore the village's commitment to balancing tourism growth with environmental conservation.

Xijiang integrates cultural preservation with tourism development, addressing economic, social, and environmental goals. Since the 2008 Guizhou Tourism Industry Development Conference, it has adopted strategies for efficient tourism management, infrastructure revitalization, and cultural heritage promotion, becoming a model for poverty alleviation and sustainable tourism. This government-led approach showcases how circular economy principles can drive local economic revitalization and sustainable development.

5.4 Insights from China's Case Studies

The case studies of Shanghai's Steel Sculpture Art Park and Xijiang Qianhu Miao Village offer key insights into how China's centralized tourism policies integrate circular economy and sustainability:

- **Strategic Role of Government**

China's top-down governance effectively aligns resources, technology, and stakeholders toward shared goals. Shanghai's "Shanghai Tourism 30 Measures" demonstrates how government-led initiatives transform industrial heritage and utilize digital technologies for sustainable urban development. Similarly, Xijiang highlights local government coordination to achieve cultural preservation and economic revitalization.

- **Sustainability with Economic Growth**

Shanghai converts industrial waste into urban tourism assets, balancing environmental solutions with revenue generation. Xijiang showcases how tourism drives regional economic growth while preserving cultural heritage and reducing poverty, providing a sustainable development model.

- **Limited Community Role**

While primarily top-down, Xijiang involves communities in tourism operations, such as locally managed accommodations and cultural programs. However, these efforts remain under government frameworks, contrasting with Japan's more community-driven models.

- Modernization and Tradition

Shanghai blends advanced technologies with industrial heritage preservation, while Xijiang leverages its traditional architecture and cultural identity to attract tourism, demonstrating how modernization can coexist with cultural preservation.

These insights highlight the strengths of China's centralized governance in achieving policy consistency and rapid implementation but reveal the need for greater local adaptability. A comparison with Japan's decentralized, community-focused model in the next section explores how these approaches address sustainability and economic goals in diverse contexts.

6. Discussion

Table 1: Highlights the key distinctions between Japan's and China's tourism policy approaches

Aspect	Japan	China
Historical Context	Decentralized approach with a focus on local autonomy	Centralized approach under strong state control
Political Context	Democratic governance enabling local policy flexibility	Policy consistency driven by centralized government leadership
Economic Context	Mature tourism market emphasizing high-value experiences	Rapidly growing tourism market focusing on mass tourism
Cultural Context	Emphasis on preserving regional culture and traditions	Unified cultural promotion directed by central government

Japan employs a decentralized tourism policy approach led by local governments and DMOs, fostering regional flexibility and community engagement. In contrast, China's centralized, top-down governance emphasizes uniformity and rapid implementation. These approaches reflect distinct historical, political, economic, and cultural contexts.

Japan's postwar decentralization, strengthened by the 1999 Omnibus Decentralization Act, has enabled tourism policies tailored to regional needs, promoting ecotourism and cultural preservation. Meanwhile, China's centralized planning, rooted in its 1978 economic reforms, facilitates large-scale, uniform tourism development as part of national strategies.

Politically, Japan's democratic governance empowers local governments to adapt policies to community needs, fostering collaboration with residents and DMOs. China's centralized framework enables long-term strategic planning and efficient implementation, though it risks underrepresenting local voices.

Economically, Japan emphasizes high-value tourism, leveraging initiatives like Niseko's renewable energy use and Miyama's ecotourism. China prioritizes mass tourism and infrastructure expansion, exemplified by Shanghai's urban projects and Xijiang's integrated tourism development.

Culturally, Japan centers on preserving regional heritage and natural environments through community collaboration, while China promotes cultural tourism within a unified framework. Although this highlights ethnic and traditional assets, standardization risks diminishing regional uniqueness.

Japan's decentralized approach excels in innovation and local participation but struggles with nationwide policy consistency. Conversely, China's centralized model ensures efficiency and resource concentration but limits grassroots involvement. Sustainability in Japan prioritizes environmental conservation and cultural preservation, while China integrates sustainability as a complement to economic goals, as seen in Shanghai's recycling and education initiatives.

A hybrid model combining Japan's flexibility and inclusivity with China's efficiency and coherence could optimize sustainable tourism development. This integration may offer a blueprint for balancing economic growth with cultural and environmental preservation.

The next section will synthesize these findings, address study limitations, and propose directions for future research.

7. Conclusion

This study analysed the incorporation of circular economy and sustainability principles in Japan's and China's tourism policies, comparing their impacts on local communities, the environment, and economies. It also examined potential policy directions for post-pandemic tourism recovery.

For Research Question 1—"What policies have Japan and China adopted for post-pandemic tourism recovery?"—Japan emphasizes decentralized, regionally driven policies fostering ecotourism and cultural preservation, while China adopts centralized strategies focused on large-scale infrastructure and digital innovation to enhance policy coherence and efficiency.

For Research Question 2—"What differences exist in policy objectives, implementation methods, and resource allocation?"—Japan prioritizes cultural preservation and regional sustainability through local governments and DMOs. China emphasizes national tourism growth and economic development, employing centrally coordinated planning and concentrated investments aligned with national priorities.

For Research Question 3—"How can these policies be evaluated from a circular economy and sustainability perspective?"—Japan's decentralized policies effectively leverage regional resources, contributing to long-term environmental conservation and local economic growth. China's centralized policies achieve rapid economic expansion and tourism growth, incorporating complementary measures for environmental and cultural protection to enhance economic sustainability.

This study highlights the strengths of both approaches. Japan's decentralized model leverages local characteristics and fosters community-driven tourism, while China's centralized approach ensures swift outcomes and consistent policy execution. A hybrid model integrating regional flexibility with centralized coherence could maximize the effectiveness of tourism policies.

Limitations include reliance on policy documents and statistical data, without direct surveys of stakeholders or residents, potentially limiting insights into on-the-ground implementation. Additionally, the case studies focused on specific regions—Niseko and Miyama in Japan, and Shanghai and Xijiang in China—without broader regional comparisons.

Combining qualitative and quantitative methods, such as stakeholder interviews, would provide a more comprehensive evaluation. Incorporating international comparisons could clarify the distinct characteristics of Japan's and China's policies. Additionally, exploring the integration of tourism policies with digital technologies and climate strategies could further enhance sustainability.

In conclusion, this study provides comparative insights into Japan's decentralized and China's centralized approaches to sustainable tourism. By analysing their challenges and achievements, it offers valuable lessons for countries seeking to balance economic growth with environmental conservation through effective tourism policies. These findings aim to contribute to global efforts toward sustainable development.

Acknowledgments

This research was supported by a grant from the Ishii Memorial Securities Research Promotion Foundation. The author expresses sincere gratitude for their generous support.

References

- Arai, N. (2022). Historical transitions of tourism policies in Japan and challenges for sustainable tourism. *Journal of Regional Policy Studies*, 15(3), 45–62.
- Baijiahao. (n.d.). Industrial heritage transformed into urban art space! Visit this park in Baoshan, Shanghai. Retrieved November 19, 2024, from <https://baijiahao.baidu.com/s?id=1781105362883829182&wfr=spider&for=pc>
- City of Takayama. (n.d.). Policy for sustainable regional development utilizing tourism. *Official Website of Takayama City*. Retrieved November 19, 2024, from <https://www.city.takayama.lg.jp/shisei/1000067/1014794/1020529.html>
- Geissdoerfer, M., Savaget, P., Bocken, N. M., & Hultink, E. J. (2017). The circular economy – A new sustainability paradigm? *Journal of Cleaner Production*, 143, 757–768.
- Guizhou Tourism Official Website. (n.d.). Map of Guizhou. Retrieved November 19, 2024, from <http://kishu-kanko.com/map.html>
- Han, L. (2008). Challenges and prospects for sustainable tourism in China. *CORE*. Retrieved November 19, 2024, from <https://core.ac.uk/download/pdf/>

- Imaizumi, H. (2020). Sustainable regional development and tourism: Examining overtourism from the perspective of pro-poor tourism. *Collected Papers of Economics, Chuo University*, 60(5–6), 91–106.
- Li, M. (2018). The “sustainability” and tourism in China. *Journal of Wayo Women's University*, 59, 47–58.
- Meng, H. (2024). Current situation of ecotourism in China: A case study of Longsheng Autonomous County. *The Annual Report of Economic Studies, Graduate School of Economics, Hokkai-Gakuen University*, 24, 1–23.
- Ministry of the Environment, Japan. (n.d.). Shiretoko ecotourism strategy. *Hokkaido Regional Environmental Office*. Retrieved November 19, 2024, from <https://hokkaido.env.go.jp/kushiro/content/900145395.pdf>
- Ministry of Land, Infrastructure, Transport and Tourism, Japan Tourism Agency. (2022). Case studies on the implementation of sustainable tourism content: Based on the FY2022 sustainable tourism content enhancement model project. Retrieved November 19, 2024, from <https://www.mlit.go.jp/kankocho/content/001595025.pdf>
- Miyama Navi. (n.d.). About Miyama. Retrieved November 19, 2024, from <https://miyamanavi.com/information/about-miyama>
- Ota, T. (2010). Tourism destination revitalization: Policy challenges and the potential and direction of regional policy. *Research Series of Shizuoka University Economic Research Center*. Retrieved November 19, 2024, from <https://shizuoka.repo.nii.ac.jp>
- Raworth, K. (2017). Doughnut economics: Seven ways to think like a 21st-century economist. *Random House Business Books*.
- Ryugin Research Institute. (n.d.). Current status and challenges of overtourism in Okinawa Prefecture. Retrieved November 19, 2024, from <https://www.ryugin-ri.co.jp/tyousareport/16519.html>
- Shanghai Municipal Government. (2018, September 7). "Shanghai Tourism 30 Measures" to create a more attractive tourism destination: Aim to become a high-quality world-famous tourism city by 2035. Retrieved November 19, 2024, from https://www.shanghai.gov.cn/nw43407/20200824/0001-43407_1338413.html
- Shanghai Municipal Government. (n.d.). Basic facts about Shanghai. Retrieved November 19, 2024, from <https://english.shanghai.gov.cn/en-BasicFacts/20240304/5ffafbd3f3d74a5aad340c9833c9f989.html>
- Shikida, A., & Morishige, M. (2008). Environment-system relationship model for sustainable tourism management. *Proceedings of the Japan Institute of Tourism Research Annual Conference*, 23, 491–492.
- Town of Niseko. (n.d.). Statistical data and resources. Retrieved November 19, 2024, from <https://www.town.niseko.lg.jp/chosei/tokei/shiryo/>
- Town of Niseko, Commerce and Tourism Division. (2023). Tourist influx data for Niseko Town: Foreign visitors edition (FY2023: April 2023 – March 2024). Retrieved November 19, 2024, from <https://www.town.niseko.lg.jp/resources/output/contents/file/release/881/10190/irikomiforeignR5.pdf>
- Town of Obuse. (n.d.). Obuse town environmental initiatives: Subsidy system for residential solar power and storage battery installation. Retrieved November 19, 2024, from <https://www.town.obuse.nagano.jp/docs/257028.html>
- United Nations World Tourism Organization (UNWTO). (2019). UNWTO world tourism barometer and statistical annex, January 2019. *Madrid, Spain: UNWTO*. Retrieved November 19, 2024, from <https://www.unwto.org>
- United Nations World Tourism Organization (UNWTO). Global and regional tourism performance. Retrieved November 19, 2024, from <https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>
- World Travel & Tourism Council. (2019). Travel & tourism economic impact 2019. Retrieved November 19, 2024, from <https://wtcc.org>

Exploring Sustainable Tourism Research Trends: A Literature Review of the Last Decade

Elisabete Nogueira and Zulmira Montenegro

Portugalense University, Research on Economics, Management and Information Technologies, REMIT, Porto, Portugal

elisabete.s.nogueira@gmail.com

zulmiramontenegro@gmail.com

Abstract: Sustainable tourism has emerged as a critical focus in contemporary discussions surrounding environmental conservation and social responsibility. As global tourism continues to expand, the need for sustainable practices becomes increasingly urgent to mitigate adverse impacts on natural ecosystems and support local communities. This article presents a systematic literature review dedicated to exploring the key research trends in sustainable tourism from 2015 to 2024. The review aims to synthesize existing knowledge and highlight the importance of sustainability in the tourism sector. Data for this review was collected from the Scopus database, utilizing the keywords "sustain* tourism". This search yielded a total of 620 articles, reflecting a robust body of research in this vital area. A thematic evolution analysis was subsequently conducted to map the most prominent research areas and uncover existing gaps and opportunities for future inquiry. By focusing on the evolution of themes within the field, this study provides insights into both current and emerging topics relevant to sustainable tourism. Findings show that, the themes in sustainable tourism research have shown both divergence and convergence over time. From 2015–2019, "sustainable tourism" split into "sustainable tourism," "governance," and "development" by 2020–2022, with the latter two peaking during this period. Simultaneously, topics like "community participation," "place attachment," and others converged into "sustainable tourism." By 2023–2024, research trends displayed greater specificity. The findings from this literature review are importance to various stakeholders, including academics, policymakers, businesses, and governmental agencies. By offering a thorough perspective on sustainable tourism research, the review aims to facilitate informed decision-making processes and foster the development of more effective strategies that address sustainability challenges within the tourism industry. Furthermore, this article serves as a vital resource for guiding future research endeavours and practical applications aimed at resolving the complex issues associated with sustainability in tourism. Ultimately, the emphasis on sustainable tourism practices not only contributes to the conservation of natural and cultural resources but also ensures the well-being of local communities and the overall health of tourist destinations. By fostering collaborative efforts, this review underscores the importance of integrating sustainability into the core of tourism development strategies for a more equitable and sustainable future.

Keywords: Sustainable tourism, Literature review, Research trends, Thematic analysis, Sustainability strategies

1. Introduction

Sustainable development is an increasingly relevant theme in the global context, particularly in sectors with significant impacts, such as tourism. According to Hall (2019), sustainable tourism is a central concern for policymakers, marketing organizations, and researchers in the field. The World Tourism Organization (WTO) recognizes this importance by promoting sustainable tourism as a means to integrate ethics, social responsibility, and economic development. In 2017, the United Nations declared the International Year of Sustainable Tourism for Development, highlighting the global commitment to sustainability. However, despite decades of discussion on the subject, data suggests that tourism is becoming less sustainable on a global scale (Scott et al., 2016).

Global tourism has experienced exponential growth over the past few decades, reaching 1.5 billion international tourist arrivals in 2019, with projections of 1.8 billion by 2030 (World Tourism Organization, 2021). This growth, while economically beneficial, raises concerns about its sustainability. The United Nations 2030 Agenda for Sustainable Development sets clear objectives (SDGs) to end poverty, protect the planet, and ensure prosperity for all, and tourism must align with these goals (Hall, 2019). However, the relentless pursuit of economic growth in tourism often conflicts with ecological and social limits.

For this article, we adopted the definition proposed by Mallick et al. (2020), where sustainable tourism is understood as tourism that positively impacts the environment, the community and local economies. It aims to find a balance between the needs of people (including locals and visitors) and places (encompassing the natural and social environment) (Landorf, 2009).

Negative reactions in destinations such as Barcelona, Venice, and Iceland reveal a growing discontent with mass tourism, leading to a questioning of what constitutes "success" in the sector (Hall, 2019). The pressure on

local resources and communities has resulted in increased conflicts and the need to reevaluate tourism management strategies.

Higgins-Desbiolles (2018) argues that tourism must be understood and managed within a broader context of sustainability. Critically, the author states that the continuous growth of tourism, promoted by authorities and organizations, ignores the ecological limits of a finite planet, making a transition to a sufficiency approach in tourism essential—where the focus is not solely on increasing demand but also on promoting social well-being and environmental protection. This approach reinforces the need to rethink what "sustainability" means in the context of tourism, highlighting the necessity for a balance between economic and social interests.

Higgins-Desbiolles (2018) contends that the classical definition of sustainable development—"satisfying the needs of the present generation without compromising the ability of future generations to meet their own needs" (WCED, 1987)—should guide practices in tourism.

According to Rasoolimanesh et al. (2023), one of the main challenges faced in the sustainable tourism sector is the lack of consensus on appropriate indicators to measure sustainability. Effective governance is crucial for implementing the dimensions of sustainable tourism, which include economic development, social inclusion, and environmental protection (Rasoolimanesh et al., 2023). On the other hand, tourists should be considered important stakeholders, as their experiences and feedback can provide insights to enhance visitor behaviour and decision-making in sustainable tourism.

The literature emphasizes the need for a systematic and well-monitored approach to sustainable tourism that utilizes clear and robust indicators (Hall, 2008; Torres-Delgado & Palomeque, 2014). The lack of practical tools and the overload of available options can hinder real progress toward more sustainable tourism (Pulido-Fernández et al., 2015). The challenges faced by sustainable tourism are not only technical but also sociocultural. According to Eslami et al. (2019), community attachment and the perceived impacts of tourism are directly related to quality of life and support for sustainable tourism development. This underscores the importance of local community participation in decision-making to ensure that the benefits of tourism are equitably distributed and that negative impacts are mitigated (Eslami et al., 2019). There are various types of tourism; for example, Industrial Tourism can educate and motivate the public on a specific theme (Pavlaković et al., 2021) while also demonstrating environmental integrity and a green attitude (Ruban et al., 2019; McBoyle, 1996; Rudd and Davis, 1998). Agyeiwaah et al. (2017) suggest that sustainable tourism should be viewed as a "journey" of small steps, where progress is often slow and nonlinear, requiring collaboration among all stakeholders, including tourists, residents, and managers, to create viable solutions.

2. Materials and Methods

This study employed a thematic evolution analysis of the field, following a systematic five-step process to ensure the relevance and quality of the selected sample. The steps are detailed as follows: In Step 1, we selected the Scopus database to identify the sample and define the scope of the study. We selected Scopus, a leading bibliographic database (Niñerola et al., 2019) managed by Elsevier (Liu, 2013), due to its significance and comprehensive academic coverage. The search was conducted on October 4, 2024, covering the period from 2015 to 2024. The search was performed based on article titles, following the approach of (Niñerola et al., 2019), as the primary effort was to specifically identify studies focused on sustainable tourism, ensuring a more targeted and relevant selection of articles. In Step 2, we conducted a keyword search using the term "sustain* tourism," which initially yielded 2,043 publications. In Step 3, we applied exclusion criteria to focus only on articles and reviews, which reduced the sample to 1,319 documents, excluding 724 publications. In Step 4, we limited the analysis to articles written in English, further narrowing the sample to 1,259 documents, with 535 publications excluded. In Step 5, we filtered the results by selecting the relevant Scopus categories, specifically Business, Management, and Accounting, due to their cohesiveness, interdisciplinarity, and thematic diversity. These categories form a dome encompassing various subdisciplines, enabling the establishment of links with adjacent fields (Santos & Mayoral, 2020). This step resulted in a final sample of 620 articles, following the exclusion of 639 documents, Figure 1. These five steps ensured the selection of a robust and relevant sample for analyzing the thematic evolution within the field of sustainable tourism.

Table 1: Overview of the methodological steps involved in the study

Steps	Exclusion criteria	Number of publications
Step 1	Select database: Scopus	-
	Search date: October, 4 2024 (2015 -2024)	-
	Search performed by: article title	-
Step 2	Search Keywords:	-
	"sustain* tourism"	2 043
Step 3	Documents types: articles and reviews articles	1319 (724 excluded)
Step 4	Articles written in English	1259 (535 excluded)
Step 5	Scopus Categories: Business, Management and Accounting	620 (639 excluded)
Articles for analyses - 620		

For our analysis, we used the Bibliometrix software, which offers a comprehensive set of techniques and is accessible to researchers via the Biblioshiny interface (Moral-Muñoz et al., 2020).

3. Results and Discussion

Our sample provides key bibliometric indicators for the period spanning from 2015 to 2024. A total of 620 documents were identified, sourced from 153 different publications, with an annual growth rate of 10.72%, indicating a consistent increase in research output over time. The dataset includes contributions from 1,615 authors, of which 92 are single-authored publications. The average number of co-authors per document is 2.95. In terms of keywords, 1,905 distinct author keywords were used across the documents, reflecting the diversity of topics within the research field. The references cited amount to 34,097, highlighting the body of prior work that the analysed documents build upon. The average age of the documents is 3.75 years, indicating that the dataset comprises relatively recent publications. Finally, the average number of citations per document is 23.28, suggesting that the articles included in this analysis are well-cited and influential within their field.

3.1 Annual Scientific Production

The annual scientific production from 2015 to 2024 demonstrates a consistent upward trend, starting with 34 articles in 2015 and gradually increasing to 41 in 2016, 55 in 2017, 57 in 2018, and 58 in 2019. A notable rise occurred in 2020 with 65 publications, followed by a slight decrease to 60 in 2021, before reaching 66 articles in 2022. The most significant growth occurred in 2023 with 99 articles, and while there was a slight decline to 85 articles in 2024, the overall production across the decade amounted to 620 publications, highlighting the expanding interest and research activity within the field, Figure 1.

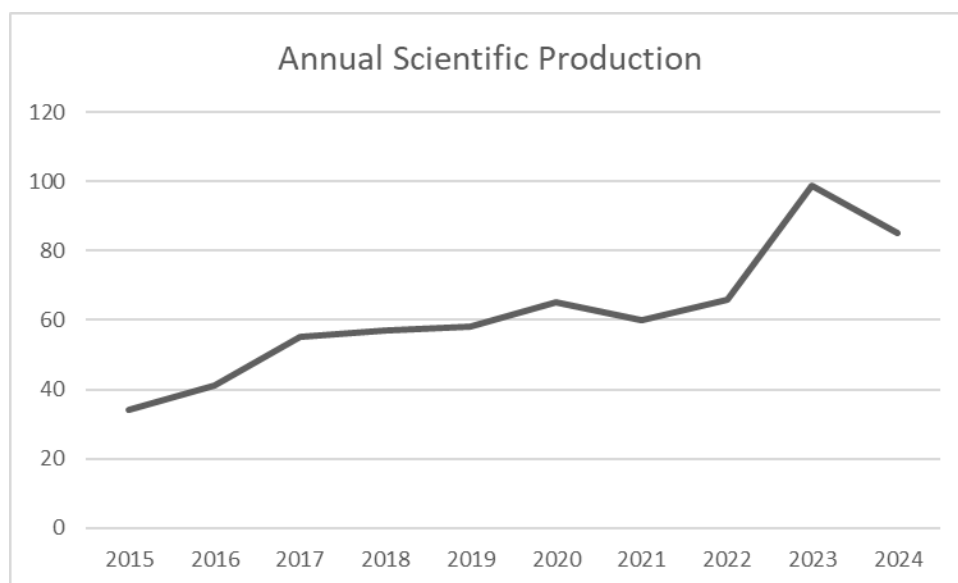


Figure 1: Annual Scientific Production

3.2 Most Cited Articles

Regarding the most cited articles in sustainable tourism research, at the top is Hall (2019), with a notable contribution that has received 441 citations. Higgins-Desbiolles follows with two key articles, from 2020 and 2018, accruing 306 and 305 citations, respectively. Ruhanen et al. (2015) study has 297 citations, reflecting sustained relevance in the academic discourse. Rasoolimanesh et al. (2023) publication has garnered 252 citations, underscoring its importance in recent scholarly work. Sobaih et al. (2021) paper accumulated 213 citations. Other notable authors include Boley et al. (2017) (212 citations), Nepal et al. (2019) (206 citations), and Agyeiwaah et al. (2017) (181 citations), each addressing critical aspects of sustainable tourism such as environmental impact, community involvement, and policy implications. The list also highlights the interdisciplinary nature of the research, with contributions from Carr et al. (2016) (173 citations), Eslami et al. (2019) (172 citations), and Kim et al. (2019) (158 citations), who focus on indigenous perspectives, community attachment, and intangible cultural heritage, respectively. Grilli et al. (2021) and Rasoolimanesh et al. (2017) (with another significant paper from 2017) continue the discussion with works that have accumulated 157 and 137 citations. Finally, Cheung & Li (2019) and Guaita Martínez et al. (2019) round out the list with contributions focused on overtourism and rural tourism stability, receiving 134 and 131 citations, respectively. This compilation reflects the diverse and evolving research landscape within sustainable tourism, addressing various contemporary challenges and opportunities in the field.

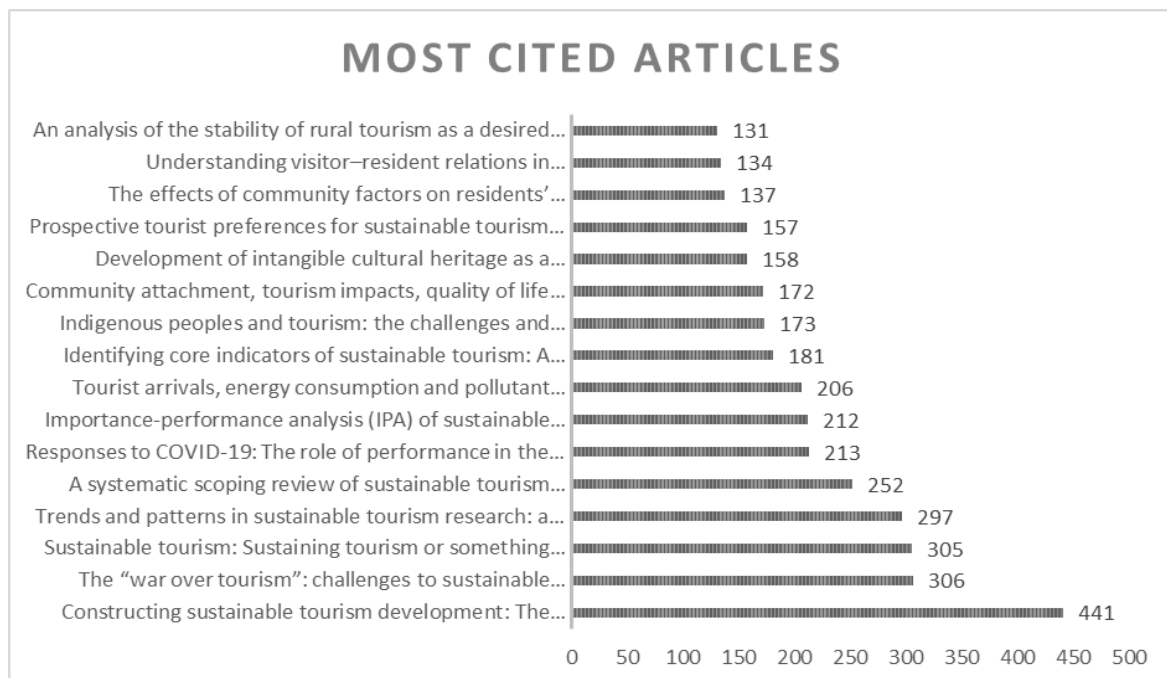


Figure 2: Most Cited Articles

3.3 Most Relevant Sources

The most relevant sources for publications in this field highlight the predominant academic journals contributing to the literature on tourism, sustainability, and hospitality. "Most relevant" refers specifically to sources with the highest number of publications, reflecting their prominent role in advancing research in this area. Leading the list is the Journal of Sustainable Tourism with 111 articles, reflecting its central role in disseminating research on sustainable tourism practices. The African Journal of Hospitality, Tourism and Leisure follows with 25 articles, indicating its focus on the hospitality and tourism sectors in the African context. The Journal of Environmental Management and Tourism and Worldwide Hospitality and Tourism Themes both contributed 21 articles each, emphasizing environmental management in tourism and hospitality-related themes, respectively. Tourism Planning and Development provided 20 articles, focusing on strategies and planning for tourism development, while Current Issues in Tourism contributed 19 articles, addressing contemporary challenges in the field. Other important sources include the Tourism Review with 17 articles, the Journal of Cleaner Production with 16 articles, and Tourism Recreation Research with 14 articles, the latter focusing on leisure and recreation in tourism. The Asia Pacific Journal of Tourism Research, Tourism,

and Tourism Management all contributed 11 articles each, rounding out the list of key sources and emphasizing their regional and global perspectives on tourism management and development.

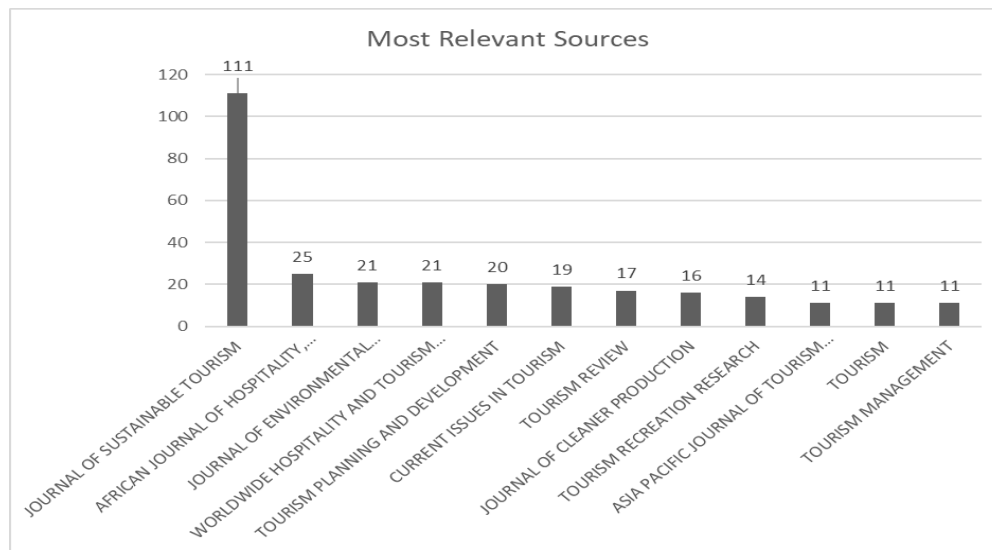


Figure 3: Most Relevant Sources

3.4 Most Relevant Authors

The most relevant authors contributing to the field are led by Font X, who has published 10 articles, making a significant impact on the body of literature. Following Font, Fuchs K, Hall CM, and Weaver D each have 6 articles, indicating their prominent roles in shaping ongoing research. Several authors, including Ruhanen L and Weaver DB, contributed 5 articles each, demonstrating consistent engagement in the field. Additionally, Dwyer L, Gautam V, Lesar L, Stojanović V, Wearing S, and Özgüt H have each published 4 articles, further enriching the research landscape. These authors represent a diverse set of perspectives and research focuses, collectively contributing to the growing body of knowledge in sustainable tourism, hospitality, and related disciplines.

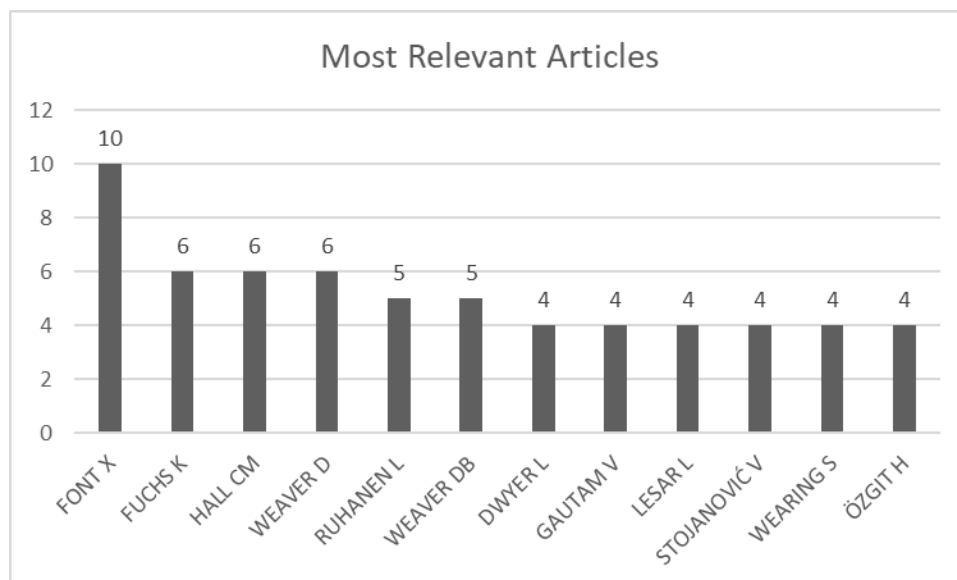


Figure 4: Most relevant authors

3.5 Thematic Evolution

The analysis of thematic evolution within the research field was conducted using author keywords, allowing for the exploration of the conceptual structure over time. The thematic progression between 2015 and 2024 reveals significant shifts in focus and the development of various research topics (as shown in Figure 5). From 2015 to 2019, the primary focus areas were "rural tourism", "sustainable tourism", "sustainability",

"stakeholder theory", "community participation", "place attachment", "tourism management", "business model", "certification", "authenticity" and "sustainable tourism development". These themes highlight the early emphasis on sustainability and its integration with tourism, particularly concerning environmental and economic aspects. In the subsequent period of 2020 to 2022, there was a noticeable expansion and evolution of topics. "Sustainable tourism" remained a central theme, as it was "sustainability", but they were accompanied by emerging topics such as "governance," "destination management," "development" and "case study". The "sustainable tourism development" continued to be a relevant theme. This period saw a shift toward more complex issues like governance structures and the management of tourism destinations, reflecting the maturing of sustainability research in tourism. Moving to the most recent period, 2023 to 2024, new themes emerged, including "protected areas", "biodiversity", "covid-19", "tourism impacts", "resilience", "environmental sustainability" and "sustainable tourism indicators". These topics indicate a growing interest in conservation and the role of protected areas in tourism, as well as an ongoing focus on sustainable development practices. This thematic evolution underscores the dynamic and expanding nature of research in sustainable tourism, with a clear shift from broad sustainability themes to more specific areas of interest such as governance, conservation, and biodiversity in the later stages. The development of these themes reflects the field's progression toward addressing complex environmental, social, and managerial challenges within the context of tourism.

In general, it is possible to see that the different themes have been evolving in a divergent but also convergent way. In particular, "sustainable tourism" investigated in 2015-2019 diverged in 2020-2022 into 3 distinct themes, "sustainable tourism", "governance", and "development", with the last two having their peak in 2020-2022. On the other hand, "community participation", "place attachment", "tourism management", "business model", "certification", and "authenticity" converged in 2020-2022, towards a broader topic of "sustainable tourism". In 2023-2024, greater specificity in research approaches is once again noted.

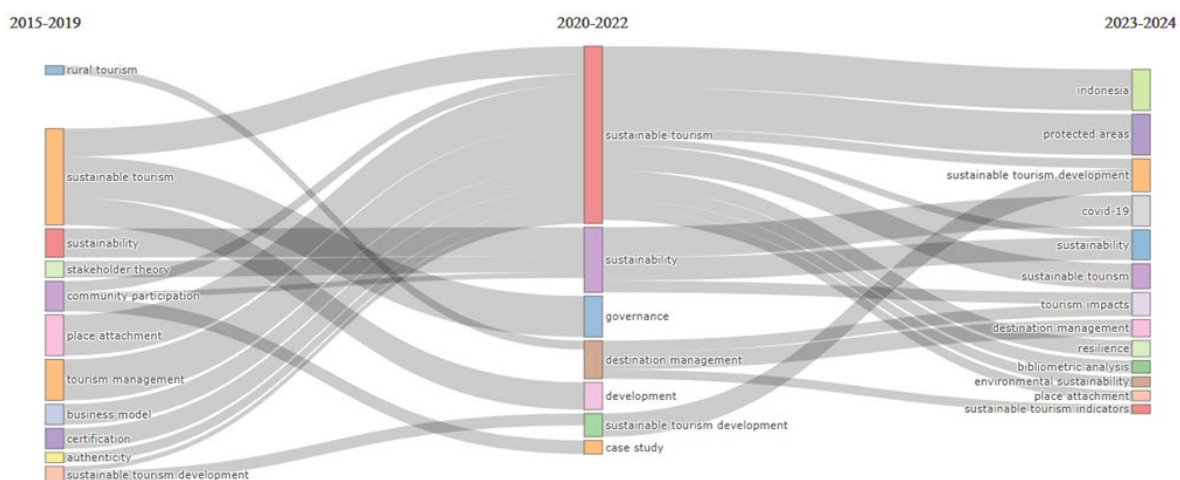


Figure 5: Thematic Evolution

The field of sustainable tourism presents significant potential for future investigations that address critical and complex issues. The following guidelines aim to enrich the understanding of the impacts and dynamics of tourism in different contexts.

One of the primary recommendations is to conduct studies that analyze cultural and geographical diversity, allowing for conclusions applicable to various locations and tourist profiles. These studies should encompass a broader range of cities and regions, incorporating the analysis of temporal trends, such as seasonality and market changes, to obtain a more comprehensive view of the factors affecting sustainability. Conducting primary field studies in diverse geographical and socioeconomic contexts is essential. Longitudinal studies that track initiatives over time would provide valuable information about the long-term outcomes of sustainable tourism practices.

Moreover, it is crucial to explore the relationship between tourists and the interactions between hosts and guests. This analysis could offer insights into how these relationships impact sustainable development. Additionally, investigating the tourist experience about the quality of life of host communities will enhance our understanding of the effects of visitors on local well-being.

The integration of advanced technologies, such as big data and artificial intelligence, is also a relevant directive. These tools can assist in understanding the attitudes and behaviours of residents and tourists, providing real-time data that can inform more adaptive policies. Evaluating the role of various entities in promoting sustainable tourism and investigating how local policies can influence the adoption of more responsible practices are areas that require attention.

Another aspect to consider is the analysis of specific thematic practices, such as gastronomic experiences and ecotourism, among others, to identify how factors such as reputation, environmental quality, and service quality influence tourists' choices regarding sustainable destinations. Studying the motivators of sustainable behaviours among both tourists and host communities is fundamental for fostering more responsible practices.

While post-COVID tourism continues to be a focus of research, an important challenge for the future will be to understand how residents perceive the changes brought about by tourism and, paradoxically, how these changes may limit their rights. The analysis of the phenomenon of over-tourism in historic cities should be deepened, as well as the investigation of how tourism policies affect the rights of residents in these contexts.

Interdisciplinary approaches that integrate urban planning, environmental sciences, and social sciences can offer a holistic view of the impact of tourism.

Lastly, the need to develop more precise metrics to measure the impact of sustainable tourism is evident. This includes conceptual analyses of existing indicators and the creation of new metrics. Recommendations for future research emphasize the importance of longitudinal and interdisciplinary approaches, the expansion of geographical context, the use of advanced technology, and data collection during periods of economic stability. These steps can not only provide a more complete understanding of tourism dynamics but also help shape practices that benefit both residents and the environment.

Furthermore, exploring the impact of contextual variables, such as cultural differences and the role of artificial intelligence, can significantly contribute to sustainability in tourism by optimizing processes and promoting responsible practices. The analysis of innovative and inclusive practices is essential for advancing truly sustainable tourism.

3.6 Theoretical Implications

This study advances the understanding of sustainable tourism by offering a review of research trends from the past decade, highlighting evolving themes and priorities within the field. This analysis reinforces the need for sustainable tourism frameworks to integrate multifaceted approaches, by synthesizing emerging topics such as governance, community involvement, and ecotourism, underscoring the importance of considering sustainability as a holistic concept rather than focusing on isolated dimensions. Additionally, the findings suggest that sustainable tourism strategies must continuously adapt to address new challenges and opportunities, including climate change and community resilience.

3.7 Practical Implications

The literature on sustainable tourism reveals several practical implications that can guide both research and practice in the field. Its main implications pertain to the development of effective policies; sustainable planning and management; education and awareness; the role of Innovation and technological adaptation in promoting sustainability; strengthening local communities; metrics and assessment of sustainability, and the promotion of sustainable destinations.

4. Conclusion

This literature review underscores the critical importance of sustainable tourism in addressing the environmental, social, and economic impacts of a rapidly growing global tourism sector. By analyzing research trends from 2015 to 2024, this study highlights the evolving focus areas and key themes in sustainable tourism. The data, sourced from 620 articles in the Scopus database, reveals a robust body of research that reflects both the progress and gaps within this field. The thematic evolution analysis provides insights for various stakeholders—academics, policymakers, industry leaders, and government agencies—by identifying current and emerging topics that can inform decision-making and shape future sustainable tourism strategies. These findings emphasize that the integration of sustainable practices is not only essential for the protection of natural ecosystems and local cultures but is also crucial for ensuring the long-term viability and appeal of tourist destinations. Ultimately, this study advocates for a collaborative, multi-stakeholder approach to

embedding sustainability at the core of tourism development. By fostering such efforts, sustainable tourism can contribute significantly to both local community well-being and the preservation of global resources, promoting a balanced, equitable future for the industry.

This study has certain limitations. First, the analysis was based solely on articles from Scopus. Although this database is recognized as one of the most extensive sources of peer-reviewed research, it is not the only available option. Additionally, the filtering process and use of analytical software may have led to the omission of some relevant literature. Alternative keywords might also have broadened the scope of the review. Based on these limitations, future research should consider expanding the analysis to include additional databases, such as Web of Science and EBSCO.

Acknowledgement

This work was supported by the UIDB/05105/2020 Program Contract, funded by national funds through the FCT I.P.

References

- Agyeiwaah, E., McKercher, B., & Suntikul, W. (2017). Identifying core indicators of sustainable tourism: A path forward? *Tourism Management Perspectives*, 24, 26–33. <https://doi.org/10.1016/j.tmp.2017.07.005>
- Boley, B. B., McGehee, N. G., & Tom Hammett, A. L. (2017). Importance-performance analysis (IPA) of sustainable tourism initiatives: The resident perspective. *Tourism Management*, 58, 66–77. <https://doi.org/10.1016/j.TOURMAN.2016.10.002>
- Carr, A., Ruhanen, L., & Whitford, M. (2016). Indigenous peoples and tourism: the challenges and opportunities for sustainable tourism. *Journal of Sustainable Tourism*, 24(8–9), 1067–1079. <https://doi.org/10.1080/09669582.2016.1206112>
- Cheung, K. S., & Li, L. H. (2019). Understanding visitor–resident relations in overtourism: developing resilience for sustainable tourism. *Journal of Sustainable Tourism*, 27(8), 1197–1216. <https://doi.org/10.1080/09669582.2019.1606815>
- Eslami, S., Khalifah, Z., Mardani, A., Streimikiene, D., & Han, H. (2019). Community attachment, tourism impacts, quality of life and residents' support for sustainable tourism development. *Journal of Travel & Tourism Marketing*, 36(9), 1061–1079. <https://doi.org/10.1080/10548408.2019.1689224>
- Grilli, G., Tyllianakis, E., Luisetti, T., Ferrini, S., & Turner, R. K. (2021). Prospective tourist preferences for sustainable tourism development in Small Island Developing States. *Tourism Management*, 82, 104178. <https://doi.org/10.1016/j.TOURMAN.2020.104178>
- Guaita Martínez, J. M., Martín Martín, J. M., Salinas Fernández, J. A., & Mogorrón-Guerrero, H. (2019). An analysis of the stability of rural tourism as a desired condition for sustainable tourism. *Journal of Business Research*, 100, 165–174. <https://doi.org/10.1016/j.JBUSRES.2019.03.033>
- Hall, C. M. (2019). Constructing sustainable tourism development: The 2030 agenda and the managerial ecology of sustainable tourism. *Journal of Sustainable Tourism*, 27(7), 1044–1060. <https://doi.org/10.1080/09669582.2018.1560456>
- Higgins-Desbiolles, F. (2018). Sustainable tourism: Sustaining tourism or something more? *Tourism Management Perspectives*, 25, 157–160. <https://doi.org/10.1016/j.TMP.2017.11.017>
- Higgins-Desbiolles, F. (2020). The “war over tourism”: challenges to sustainable tourism in the tourism academy after COVID-19. *Journal of Sustainable Tourism*, 29(4), 551–569. <https://doi.org/10.1080/09669582.2020.1803334>
- Kim, S., Whitford, M., & Arcodia, C. (2019). Development of intangible cultural heritage as a sustainable tourism resource: the intangible cultural heritage practitioners' perspectives. *Journal of Heritage Tourism*, 14(5–6), 422–435. <https://doi.org/10.1080/1743873X.2018.1561703>
- Landorf, C. (2009). Managing for sustainable tourism: a review of six cultural World Heritage Sites. *Journal of Sustainable Tourism*, 17(1), 53–70. <https://doi.org/10.1080/09669580802159719>
- Liu, X. (2013). Full-Text Citation Analysis: A New Method to Enhance. *Journal of the American Society for Information Science and Technology*, 64(July), 1852–1863. <https://doi.org/10.1002/asi>
- Mallick, S. K., Rudra, S., & Samanta, R. (2020). Sustainable ecotourism development using SWOT and QSPM approach: A study on Rameswaram, Tamil Nadu. *International Journal of Geoheritage and Parks*, 8(3), 185–193. doi:10.1016/j.ijgeop.2020.06.001
- McBoyle, G. (1996). Green tourism and Scottish distilleries. *Tourism Management*, 17(4), 255–263. [https://doi.org/https://doi.org/10.1016/0261-5177\(96\)00017-9](https://doi.org/https://doi.org/10.1016/0261-5177(96)00017-9)
- Moral-Muñoz, J. A., Herrera-Viedma, E., Santisteban-Espejo, A., & Cobo, M. J. (2020). Software tools for conducting bibliometric analysis in science: An up-to-date review. In *Profesional de la Informacion* 29(1). <https://doi.org/10.3145/epi.2020.ene.03>
- Nepal, R., Indra al Irsyad, M., & Nepal, S. K. (2019). Tourist arrivals, energy consumption and pollutant emissions in a developing economy—implications for sustainable tourism. *Tourism Management*, 72, 145–154. <https://doi.org/10.1016/j.TOURMAN.2018.08.025>

- Niñerola, A., Sánchez-Rebull, M. V., & Hernández-Lara, A. B. (2019). Tourism research on sustainability: A bibliometric analysis. In *Sustainability* 11(5). <https://doi.org/10.3390/su11051377>
- Pavlaković, B.; Demir, M.R.; Pozvek, N.; Turnšek, M. Role of tourism in promoting geothermal energy: Public interest and motivation for geothermal energy tourism in Slovenia. *Sustainability* 2021, 13, 10353
- Pulido-Fernández, J.I., Andrades-Caldito, Marcelino Sánchez-Rivero, M. (2015). Is sustainable tourism an obstacle to the economic performance of the tourism industry? Evidence from an international empirical study, *Journal of Sustainable Tourism*, 23(1), 47-64, DOI: 10.1080/09669582.2014.90944
- Rasoolimanesh, S. M., Jaafar, M., Kock, N., & Ahmad, A. G. (2017). The effects of community factors on residents' perceptions toward World Heritage Site inscription and sustainable tourism development. *Journal of Sustainable Tourism*, 25(2), 198–216. <https://doi.org/10.1080/09669582.2016.1195836>
- Rasoolimanesh, S. M., Ramakrishna, S., Hall, C. M., Esfandiar, K., & Seyfi, S. (2023). A systematic scoping review of sustainable tourism indicators in relation to the sustainable development goals. *Journal of Sustainable Tourism*, 31(7), 1497–1517. <https://doi.org/10.1080/09669582.2020.1775621>
- Ruban, D. A., Molchanova, T. K., & Yashalova, N. N. (2019). Three rising tourism directions and climate change: Conceptualizing new opportunities. *E-Review of Tourism Research*, 16(4).
- Rudd, M. A., & Davis, J. A. (1998). Industrial Heritage Tourism at the Bingham Canyon Copper Mine. *Journal of Travel Research*, 36(3), 85–89. <https://doi.org/10.1177/004728759803600310>
- Ruhanen, L., Weiler, B., Moyle, B. D., & McLennan, C. Lee J. (2015). Trends and patterns in sustainable tourism research: a 25-year bibliometric analysis. *Journal of Sustainable Tourism*, 23(4), 517–535. <https://doi.org/10.1080/09669582.2014.978790>
- Santos, M. V., & Mayoral, R. M. (2020). Business, management and accounting. *Journal of Strategy and Management*, 13(2), 254–277. <https://doi.org/10.1108/JSMA-08-2019-0150>
- Scott, D., Hall, C. M., & Gössling, S. (2016). A review of the IPCC 5th Assessment and implications for tourism sector climate resilience and decarbonization. *Journal of Sustainable Tourism*, 24(1), 8–30.
- Sobaih, A. E. E., Elshaer, I., Hasanein, A. M., & Abdelaziz, A. S. (2021). Responses to COVID-19: The role of performance in the relationship between small hospitality enterprises' resilience and sustainable tourism development. *International Journal of Hospitality Management*, 94. <https://doi.org/10.1016/j.ijhm.2020.102824>
- Torres-Delgado, A., & Palomeque, F. L. (2014). Measuring sustainable tourism at the municipal level. *Annals of Tourism Research*, 49, 122-137. doi:10.1016/j.annals.2014.09.003
- World Tourism Organization (2021), *International Tourism Highlights*, 2020 Edition, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422456>

A Model for Monthly, Local-Level Airbnb Changes Using Public Dataset

Youngjun Park¹, Jisun An² and Dongman Lee¹

¹School of Computing, Korea Advanced Institute of Science and Technology, Daejeon, Republic of Korea

²Luddy School of Informatics, Computing, and Engineering, Indiana University Bloomington, Bloomington, USA

youngjourpark@kaist.ac.kr

jisunan@iu.edu

dlee@kaist.ac.kr

Abstract: This study presents a novel methodological framework for estimating monthly variations in Airbnb listings across Seoul's administrative districts from 2017 to 2019, leveraging publicly available datasets. The proposed model integrates key factors such as housing supply, lodging unit density, proximity to tourist attractions, and retail sector activity, using negative binomial regression to quantify their impact on Airbnb dynamics. Our analysis demonstrates significant variations in these effects across different districts, with the model achieving superior statistical accuracy (average Pseudo R^2 of 0.7922) compared to baseline approaches. These findings underscore the utility of using accessible, timely data for capturing short-term rental market trends and highlight the model's potential applicability in diverse urban tourism settings. The research contributes valuable insights for tourism management, helping to develop policies that align with sustainable tourism growth and local economic development. The results indicate that proximity to major tourist destinations and the number of foreign visitors are among the most influential factors in determining Airbnb activity, highlighting the strong connection between short-term rentals and tourism demand. Lodging unit density and retail composition also play significant roles in shaping the distribution of Airbnb listings, suggesting that tourism infrastructure and commercial activity are key determinants of short-term rental market expansion. The study finds that certain districts experience high Airbnb concentrations due to their tourism appeal, whereas others exhibit minimal short-term rental activity, reflecting the heterogeneous nature of urban tourism accommodation demand. Our monthly regression analysis captures dynamic fluctuations in Airbnb listings, addressing the limitations of traditional models that rely on annual data. This research has critical implications for tourism stakeholders, including policymakers, destination managers, and hospitality businesses. By incorporating real-time, publicly available datasets, our approach facilitates responsive and data-driven decision-making to manage the short-term rental market effectively while fostering sustainable tourism growth. Future studies can extend this model to other urban contexts to explore how different socio-economic and regulatory environments influence short-term rental patterns. The adaptability of this methodology makes it a valuable tool for ongoing research in tourism analytics and policies.

Keywords: Urban tourism, Short-term rentals, Airbnb, Tourism accommodation, Spatial analysis, Public data

1. Introduction

Over the past decade, Airbnb has emerged as a pivotal model enabling new local tourism cultures (Adamiak et al., 2019, Guttentag, 2015). New dynamics of Airbnb cause the trend how the supply and demand of tourism accommodation have been changed in the area (Kadi et al., 2022, Stors, 2022, Petruzzi et al., 2020). Due to the easy online platform registration and management process, Airbnb hosts are sensitive to their surroundings (Gibbs et al., 2018). Day-to-day changes of pricing, revenue, and number of listings are more fluctuating than legacy accommodation (Wang et al., 2024). Rapid changing trends of Airbnb in the local area impact not only tourism but also housing markets (Jordan and Moore, 2018, Palos-Sanchez and Correia, 2018, Avdimiotis and Poulaki, 2019). There are significant concerns among urban planners and policymakers noticing such impacts: the transformation of properties traditionally reserved for long-term residency into accommodation units; a subsequent reduction in the housing supply without a corresponding decline in housing demand; and an increasing propensity for housing rent prices to escalate, driven by competition with established accommodation facilities (Wachsmuth and Wisler, 2018, Hassanli et al., 2022, Crommelin et al., 2020). With increasing worries on these rapid changes of Airbnb that might cause disruption of long-term and sustainable market policy, monitoring and predicting the Airbnb changes have been required by policymakers and urban planners (Wegmann and Jiao, 2017, Tang and Sangani, 2015, Luo et al., 2019, Quattrone et al., 2018).

Thus, there are pressing needs to develop a predictive model for understanding Airbnb changes. Given the rapid pace of change in the short-term rental market, however, collecting relevant data in spatially and temporally fine-grained level is challenging (Wang et al., 2023). Existing models face several limitations (Ki and Lee, 2019, Morris, 2019).

- **Data Availability:** Traditionally, accessing Airbnb-related data (e.g., transaction data) has been difficult due to its proprietary nature. Platforms like AirDNA offer some insights, but reliance on publicly available data remains crucial for broader accessibility and research (Gy'odi, 2023).
- **Short-Term Predictability:** Most existing models are designed to reflect changes on an annual basis, which is insufficient for capturing the dynamic nature of Airbnb. There is a need for models capable of estimating more short-term, monthly variations (Jain et al., 2021, Wang et al., 2023, Chen et al., 2021).
- **Local-Level Predictability:** these models often operate at a city-wide level, failing to capture the concentrated nature of Airbnb activity in specific districts, particularly in high-demand urban centers (Morris, 2019, Garcia-Lamarca, 2021, Sykora and Spackova, 2022). Collecting and utilizing data at smaller geographic scales, such as census tracts, remains a significant challenge.

Inspiring approach tries to examine the spatial distribution of Airbnb in local level, by using public data (Ki and Lee, 2019, Voltes-Dorta and Sanchez-Medina, 2020, Perez-Sanchez et al., 2018). By incorporating neighborhood-level variables and publicly available statistics, they highlighted the importance of local environmental factors in explaining Airbnb distribution.

This study aims to develop a model utilizing publicly available datasets to estimate the number of Airbnb listings at the local district level on a monthly basis. Our approach focuses on several key areas to achieve this goal. First, we will analyze how local variables such as housing supply changes, shifts in the accommodation industry, commercial area developments, and fluctuations in tourist arrivals influence local Airbnb trends (Eugenio-Martin et al., 2019, Adamiak et al., 2019). By considering these factors, we aim to account for the inherent characteristics of housing-based Airbnb and their impact on the local environment.

Second, we seek to refine our model to estimate monthly changes in Airbnb listings. This will allow us to capture the rapid and dynamic nature of the Airbnb market, providing more timely and relevant insights for stakeholders (Wegmann and Jiao, 2017). Accurate monthly forecasting is essential for understanding the short-term fluctuations and immediate impacts of Airbnb on local tourism dynamics.

Finally, the model aims to inform policymakers and tourism managers, offering a robust tool to balance tourism demand with stable supply and community sustainability (Nieuwland and Van Melik, 2020, Pareja-Eastaway and Sanchez-Martinez, 2022). By providing actionable insights, we hope to support the development of effective policies that address the challenges posed by the rapid growth of Airbnb, ensuring sustainable tourism development and harmonious coexistence with local communities.

2. Methodology

2.1 Research Area and Data Source

This study develops a methodological approach to analyze monthly changes in Airbnb listings at a local district level, utilizing publicly available and frequently assessed datasets.

We select Seoul, Korea, as our research site due to its diverse range of urban districts and tourism patterns. With 9 million inhabitants, the city features varying levels of tourism demand across districts, making it suitable for studying short-term rental market dynamics. The absence of Airbnb-targeted regulations in Seoul allows for an examination of natural market dynamics, potentially mirroring other cities with similar policy environments. This aspect enhances the generalizability of our findings.

We collect Airbnb data from AirDNA¹, which provides monthly hosting information related to Airbnb listings (Wang et al., 2023). The public data policy of Seoul facilitates detailed analysis through access to spatio-temporal data, including smartphone-assessed population distribution², public transportation records³, and annual censuses for housing, economy, and population changes⁴.

¹ Available at <https://www.airdna.co/> (accessed 27 Nov 2024)

² Available at <https://data.seoul.go.kr/dataVisual/seoul/seoulLivingPopulation.do> (accessed 27 Nov 2024)

³ Available at <https://data.seoul.go.kr/dataList/OA-12914/A/1/datasetView.do> (accessed 27 Nov 2024)

⁴ Available at <https://www.census.go.kr/> (accessed 27 Nov 2024)

Our analysis spans three years (2017-2019), allowing us to study time-series changes in the Airbnb market. This timeframe, which excludes the pandemic period, captures a phase of rapid growth and transformation in Seoul's tourism sector, providing insights into the interplay between Airbnb and urban tourism dynamics. The analysis covers 421 administrative districts of Seoul, as illustrated in Figure 1.

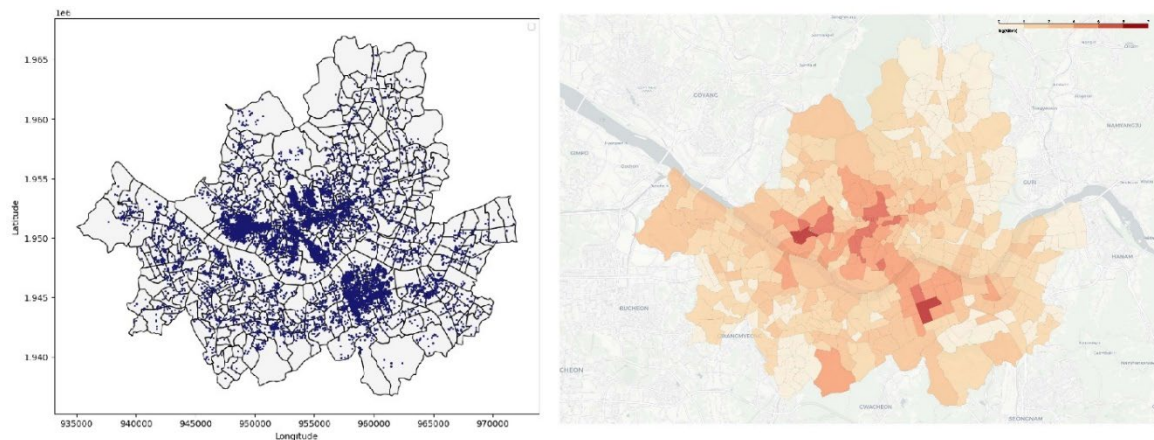


Figure 1: Spatial distribution of Airbnb in 421 administrative districts, Seoul, Korea. (Left) Location of Airbnb listings in Jan. 2017; (Right) Airbnb counts in districts from 2017 to 2019 (log scale)

2.2 Metric for Housing-Related Airbnb

In examining the changes in Airbnb listings within a local district, our analysis focuses on specific Airbnb transformed from residential properties. This approach acknowledges the significant difference between the impacts of various types of short-term rental properties on the housing market.

The original dataset obtained for this study comprises monthly records of Airbnb listings. Within this dataset, a key methodological step involved distinguishing between listings directly related to the housing market and those not. To achieve this, we categorized the listings based on their property type in Table 1. Listings that were classified as traditional accommodation facilities, such as hotels, were excluded from the analysis. This exclusion is based on the rationale that such property types, while part of the broader short-term rental market, do not directly reflect the dynamics of the housing market and thus may not accurately represent the impact of Airbnb on residential housing.

The focus of this study is on Airbnb listings operated in properties that are primarily residential – what we refer to as ‘housing-related’ Airbnb properties. This categorization allowed us to hone in on the segment of the Airbnb market that most closely intersects with, and potentially influences, the residential housing sector. For each administrative district in Seoul, we calculated the monthly counts of these housing-related Airbnb listings. These counts were then treated as the dependent variable in our analysis, labelled ‘the number of Airbnb listings (Airbnb counts)’.

Table 1: Property types in Airbnb dataset

Property type	Record in dataset	Counts	Ratio(%)
Housing-related	Entire apartment, Private room in house, House, Private room in apartment, etc.	1,544,270	75.8
Hotel-related	Room in hotel, Hostel, Guesthouse, Room in boutique hotel, Resort, Condominium (condo), Condo, etc.	476,751	23.4
Other type	Cabin, Place, Camper/RV, Bungalow, Tower, Barn, Bus, etc.	16,298	0.8

2.3 Variable Selection

Our regression analysis incorporates variables that influence Airbnb listing patterns within specific regions. The selection, detailed in Table 2, emphasizes variables with shorter assessment periods to capture temporal dynamics accurately. For housing characteristics, we include the number of residential units in each district from annual censuses. Local economic factors, including retail stores and lodging units, are processed as ratio values relative to the total number of industries in each district.

Table 2: Descriptive Statistics of Variables

Variable	Mean	Median	Std. Dev.	Min	Max
No. of Airbnb listings	20.81	6.00	73.46	0.00	2,386.00
No. of housing units	7,078.64	6,747.00	3,157.47	6.00	19,814.00
Ratio of lodging units	0.01	0.01	0.01	0.00	0.13
Ratio of retail stores	0.20	0.19	0.07	0.02	0.59
Avg. proximity to tourism places	0.01	0.01	0.02	0.01	0.36
No. of foreign visitors	612.01	157.12	1,792.72	11.32	34,582.21

A significant factor in analyzing Airbnb patterns is the accessibility to major tourist attractions. Areas with better access to these sites typically show higher Airbnb activity. We quantify this by measuring the distance from each district to ten major tourist destinations designated by the Korea Tourism Organization. To account for seasonal trends and changing preferences, we incorporate a weighting factor based on monthly public transportation usage at these locations.

Additionally, we include the number of foreign visitors in each district, measured through smartphone-sensing location data, as an indicator of international tourism activity. This variable provides insights into tourism patterns that may influence short-term rental market dynamics.

2.4 Statistical Analysis of Monthly Airbnb Patterns

Our analysis examines monthly changes in Airbnb listings using concurrent independent variables. We conduct monthly regression analyses from January 2017 to December 2019, allowing us to understand the dynamic nature of the short-term rental market.

We employ negative binomial regression due to the overdispersion characteristic of our dependent variable (Airbnb counts). This approach is particularly suitable for count data where variance exceeds the mean. The independence of Airbnb counts across districts ensures our analysis captures distinct local characteristics without cross-contamination.

The regression equation is formulated as:

$$\log(\mu_{i,t+1}) = \beta_0 + \beta_1 H_{it} + \beta_2 \left(\frac{L_{it}}{I_{it}} \right) + \beta_3 \left(\frac{R_{it}}{I_{it}} \right) + \beta_4 A_{it} + \beta_5 F_{it} \quad (1)$$

where,

- $\mu_{i,t+1}$ is the number of Airbnb listings in local district i in next month $t + 1$,
- H_{it} denotes the number of residential houses in district i in month t ,
- L_{it}/I_{it} represents the ratio of lodging units to all industries in district i in month t ,
- R_{it}/I_{it} signifies the ratio of retail stores to all industries in district i in month t ,
- A_{it} indicates the proximity to tourism places in district i in month t ,
- F_{it} is the number of foreign visitors in district i in month t ,
- I_{it} is the total number of industries in district i in month t ,
- β_0 is the intercept, and
- $\beta_1, \beta_2, \beta_3, \beta_4, \beta_5$ are the coefficients for the respective independent variables.

To ensure robust results, we conducted a Variance Inflation Factor (VIF) test to address multicollinearity, setting a threshold of 5 for all variables. We compare our results with a baseline model from Ki and Lee (2009), which considers various housing, neighborhood, and tourism factors at the local level.

3. Results

3.1 Monthly Changes of Airbnb in Local Districts

The temporal dynamics of Airbnb listings across the administrative districts of Seoul are illustrated in Appendix Figure 1. These visual representations provide a clear picture of the changing landscape of Airbnb presence from 2017 to 2019.

An overall increasing trend in Airbnb listings is observed during this period, indicating a growing influence of the platform within the city's accommodation sector. However, this upward trend is not uniform across all districts. The variation in the number of Airbnb listings in different areas reflects a considerable diversity in how Airbnb has been embraced or developed in these regions. Some districts show a rapid increase in listings, while others exhibit more moderate growth.

Table 3 presents measures of Airbnb distribution across various local districts, encompassing average, standard deviation, minimum, and maximum values of Airbnb listings from 2017 to 2019. The average number of Airbnb indicates a higher concentration of Airbnb listings in districts renowned for their tourist attractions (Appendix Tabel 1). During the research period, the tourist-centric districts exhibited significant fluctuations in Airbnb numbers, with variations ranging from approximately 50% below to 150% above the average at different times, reflecting the dynamic and highly variable nature of the short-term rental market. It is noteworthy that there were a number of districts where the Airbnb count remained at zero throughout the research period, while popular districts near the urban core have a large number of Airbnb. This disparity highlights a pronounced concentration of Airbnb listings in urban core areas, as opposed to peripheral or less tourist-centric districts, underlining the uneven spatial distribution of short-term rental accommodations within the city.

Table 3: Airbnb distribution across local administrative districts in Seoul

District	avg. Airbnb	std.	min	max	avg. houses	intensity
Seogyo	1701.94	344.58	1005	2284	8899	0.27
Yeoksam	534.69	69.35	375	690	13188	0.07
Yeonnam	476.61	146.54	229	739	5256	0.12
Myeongdong	352.53	38.28	253	450	763	0.92
Shinchon	334.42	113.50	147	549	7735	0.10
Cheongpa	333.92	79.29	147	502	6110	0.08
Itaewon-1	265.97	37.94	180	329	1960	0.15
Namyeong	250.81	22.42	183	279	2646	0.16
Jongno	231.72	30.68	144	317	2857	0.20
Hoehyeon	225.33	14.00	202	251	1710	0.18
...	...	...	...	...	...	...
Geoyeo-1	0.00	0.00	0	0	3404	0.00
Sanggye-8	0.00	0.00	0	0	8768	0.00
Siheung-4	0.00	0.00	0	0	5744	0.00
Sangmun-2	0.00	0.00	0	0	6319	0.00

3.2 Analysis of factors influencing local Airbnb

We examined the stability of our regression analysis and the explanatory power of each variable. The analysis results (Pseudo $R^2 = 0.8093$) presented in Table 4 offer detailed insights into the factors associated with Airbnb listings in Seoul, analyzing data from December 2019 to understand patterns in January 2020. Each independent variable shows a statistically significant correlation with the number of Airbnb listings. Variance Inflation Factor (VIF) values below 5 for all independent variables suggest that multicollinearity is not a concern in this analysis (Table 4). This statistical significance confirms the robustness of our approach and the reliability of the variables in explaining variations in Airbnb patterns.

Our regression analysis over the 36-month period reveals nuanced dynamics between Airbnb listings and various urban factors in Seoul. The number of residential houses in a district shows a consistent positive correlation with Airbnb listings, though with a modest impact (average coefficient value = 0.000127). This suggests that while housing availability supports Airbnb activity, it is one of several factors influencing Airbnb's presence.

Table 4: Variables of our model that correlates with Airbnb in January 2020

Coefficient	Estimate	Std. Error	z value	Pr(> z)	VIF
Constant	0.7038	0.2314	3.0416	0.0024	-
residential houses	0.0001	0.0000	6.7036	<0.0001	3.7212
lodgings	32.9637	4.0727	8.0938	<0.0001	1.3971
retail stores	-1.7752	0.7986	-2.2230	0.0262	4.4912
proximity to tourism places	71.3362	4.2428	16.8136	<0.0001	3.5886
foreign visitors	0.0004	0.0000	10.1854	<0.0001	2.6005

Notably, the effect of lodging units strengthened over time, with coefficient values increasing from 19.93 to 32.96 during the study period (Figure 2). This trend underscores a growing synergy between Airbnb listings and the broader tourism and hotel industry in Seoul, suggesting Airbnb's increasing integration into the city's accommodation sector.

Proximity to tourist places remains a decisive factor, with a strong positive average coefficient of 76.35, indicating that districts near tourist sites are prime areas for Airbnb listings. This persistent trend underscores the direct connection between tourist activities and the demand for short-term accommodations, a finding consistent with expectations.

The number of foreign visitors also proves to be significant, as indicated by consistently low p-values, well below the 0.001 threshold, across the study period. The coefficient for foreign visitors, while showing slight variations, averages at 0.000428, suggesting a positive but modest influence on Airbnb listings in a district. This reveals a tangible, albeit nuanced, impact of international tourism on the demand for Airbnb, highlighting the platform's role in accommodating global visitors.

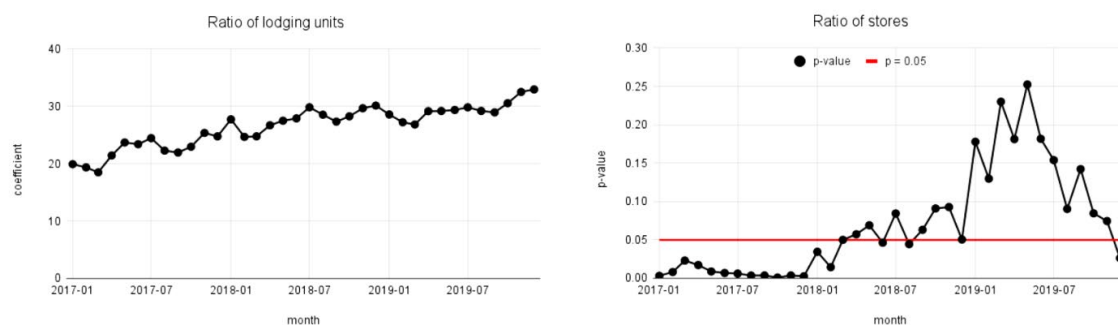


Figure 2: (Left) Coefficient of variable 'ratio of lodging' for 36 months, (Right) p-value of variable 'ratio of stores' for 36 months

3.3 Comparative Analysis of Model Performance

The performance of our model, as depicted in Figure 3, consistently outperforms the baseline across the study period from February 2017 to January 2020 (representing predicting months). A comparative analysis of the monthly performance reveals that our model demonstrates a higher average Pseudo R^2 of 0.7922 compared to the baseline's average of 0.7125. This improved performance is indicative of our model's enhanced predictive accuracy and its capability to more effectively capture the dynamics of Airbnb count fluctuations.

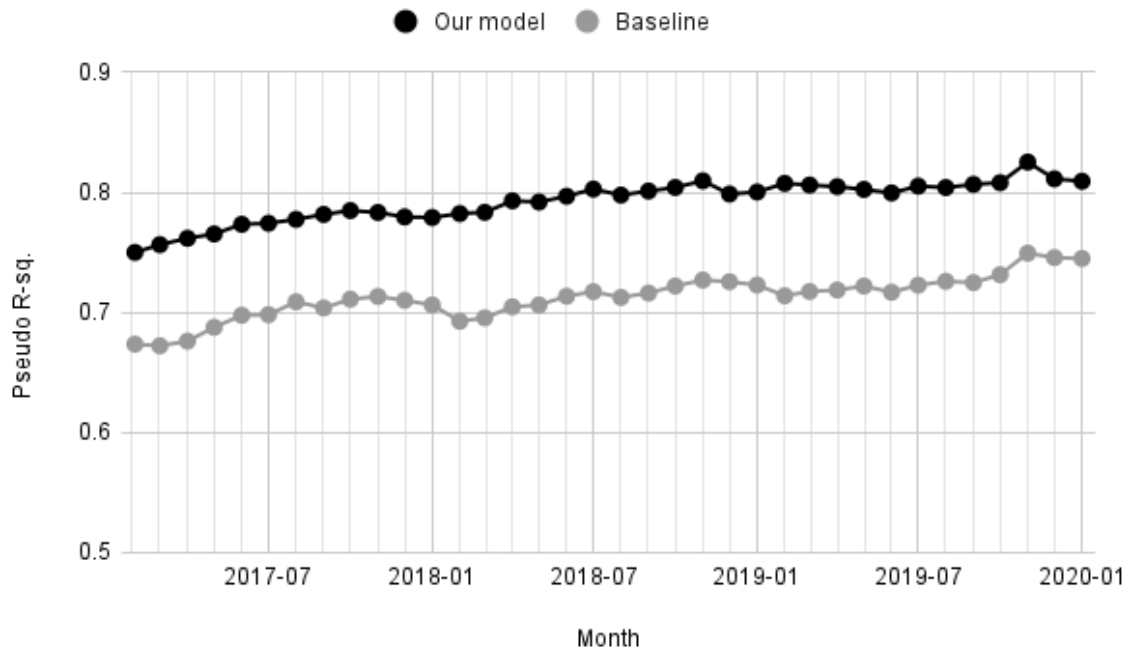


Figure 3: Comparing Pseudo R^2 of baseline and our model for 36 months

Additionally, goodness-of-fit measures including deviance and Pearson χ^2 show improvement over the baseline approach. These statistical measures reflect our model's closer fit to the observed data. Lower deviance and Pearson χ^2 values suggest more accurate representation of the underlying patterns.

This monthly regression analysis underscores our approach's effectiveness in capturing the dynamic nature of the short-term rental market. The consistent statistical performance over an extended period highlights its value as an analytical tool for tourism managers and policymakers, offering reliable insights for understanding urban tourism and short-term rental market patterns.

4. Conclusion

Our examination of Airbnb's impact on local tourism from 2017 to 2019 reveals complex patterns in how this platform integrates into urban tourism landscapes. By analyzing monthly data across Seoul's administrative districts, we shed light on the spatial and temporal dynamics of short-term rentals, using readily available public datasets to understand these evolving patterns.

The analysis reveals intricate relationships between Airbnb presence and various urban characteristics. Housing stock, lodging infrastructure, retail density, tourist site proximity, and tourism visitor flows all shape Airbnb distribution, though their influence varies markedly across districts. Our statistical approach proved particularly effective at capturing these local variations, achieving stronger explanatory power (Pseudo $R^2 = 0.7922$) than previous methods (0.7125). This improvement reflects our success in capturing the better ways Airbnb integrates into different urban contexts.

These findings carry significant implications for tourism research and practice. They demonstrate how data-driven approaches can illuminate the complex ways sharing economy platforms reshape urban tourism. Our methodology offers tourism managers and policymakers a clearer view of how short-term rentals interact with local tourism dynamics, enabling more targeted and responsive policy interventions.

Yet our study faces certain constraints. Its replication elsewhere depends heavily on access to specific data sources, particularly smartphone-based visitor tracking, which may not be available in all cities. Future research could valuably extend this work to other urban contexts, examining how Airbnb's impact varies under different socio-economic and regulatory conditions. Scholars might also explore the long-term effects of Airbnb on tourism development and neighborhood character. The COVID-19 pandemic's profound disruption of travel patterns opens another important avenue for research, as changing tourist behaviors may reshape the short-term rental market in ways that demand policy adaptation.

This investigation advances tourism management while providing practical tools for addressing the challenges posed by short-term rental platforms. Our use of public datasets demonstrates how researchers can overcome data access barriers through innovative methodological approaches. The integration of fine-grained temporal data with statistical analysis creates a framework adaptable to diverse urban settings, deepening our understanding of how short-term rentals reshape tourism landscapes.

In an era of rapid change in urban tourism, evidence-based analysis becomes increasingly vital for effective planning and policy-making. As cities continue evolving, our analytical approaches must keep pace with the changing dynamics of platform-mediated tourism. This study represents a step toward more accessible, empirically grounded tourism research, offering insights that can help cities better manage the growing complexity of their short-term rental markets.

Data availability

The local population and foreign tourists data that support the findings of this study are available in Seoul Open Data Platform at [<https://data.seoul.go.kr/>]. These data were derived from the following resources available in the public domain: [<https://data.seoul.go.kr/dataVisual/seoul/seoulLivingPopulation.do>]

The public transportation data that support the findings of this study are available in Seoul Open Data Platform at [<https://data.seoul.go.kr/>]. These data were derived from the following resources available in the public domain: [<https://data.seoul.go.kr/dataList/OA-12914/A/1/datasetView.do>]

The housing and industry data that support the findings of this study are available in Statistics Korea at [<https://kostat.go.kr/>]. These data were derived from the following resources available in the public domain: [<https://sgis.kostat.go.kr/view/pss/openDataIntrcn>]

The Airbnb data that support the findings of this study are available from AirDNA at [<https://www.airdna.co/>]. Restrictions apply to the availability of these data, which were used under license for this study. Data are available at [<https://www.airdna.co/>] with the permission of AirDNA.

Acknowledgements

This work was supported by Institute of Information & communications Technology Planning & Evaluation (IITP) grant funded by the Korea government (MSIT) (No.2019-0-01126, Self-learning based Autonomic IoT Edge Computing)

Ethics declaration: The authors report there are no potential conflict of interest to declare.

AI declaration: The authors report there are no use of AI tool in this research.

References

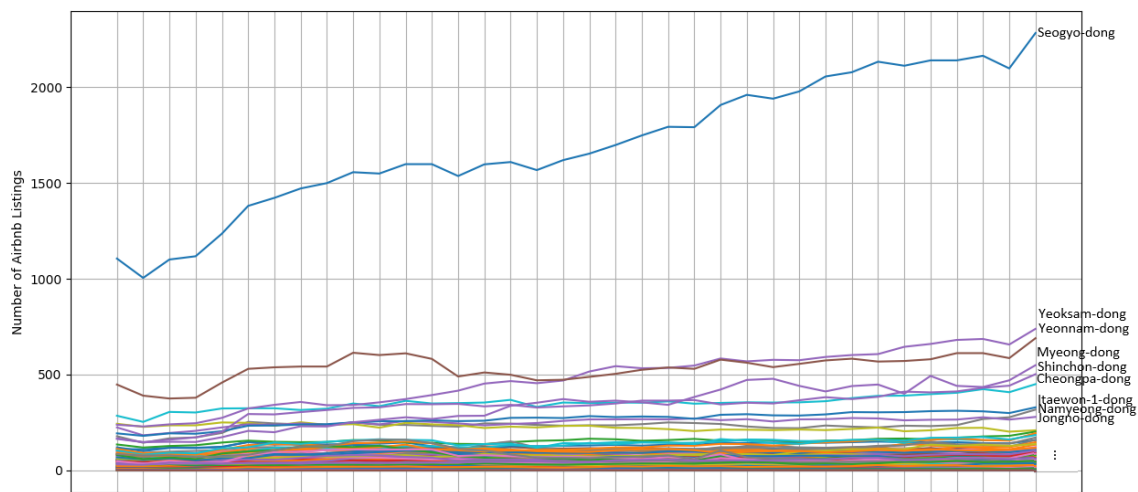
- Adamiak, C., Szyda, B., Dubownik, A. and Garcí'a- Álvarez, D. (2019). Airbnb offer in Spain—spatial analysis of the pattern and determinants of its distribution, *ISPRS International Journal of Geo-Information* 8(3): 155.
- Chen, Y., Huang, Y. and Tan, C. H. (2021). Short-term rental and its regulations on the home-sharing platform, *Information & Management* 58(3): 103322.
- Avdimiotis, S. and Poulaki, I. (2019). Airbnb impact and regulation issues through destination life cycle concept, *International Journal of Culture, Tourism and Hospitality Research* 13(4): 458–472.
- Chen, Y., Huang, Y. and Tan, C. H. (2021). Short-term rental and its regulations on the home-sharing platform, *Information & Management* 58(3): 103322.
- Crommelin, L., Troy, L., Martin, C. and Pettit, C. (2020). Is Airbnb a sharing economy superstar? evidence from five global cities, *Disruptive Urbanism*, Routledge, pp. 37– 52.
- Eugenio-Martin, J. L., Cazorla-Artiles, J. M. and González-Martel, C. (2019). On the determinants of Airbnb location and its spatial distribution, *Tourism Economics* 25(8): 1224–1244.
- García-Lamarca, M. (2021). Real estate crisis resolution regimes and residential reits: Emerging socio-spatial impacts in Barcelona, *Housing Studies* 36(9): 1407–1426.
- Gibbs, C., Guttentag, D., Gretzel, U., Yao, L. and Morton, J. (2018). Use of dynamic pricing strategies by Airbnb hosts, *International Journal of Contemporary Hospitality Management* 30(1): 2–20.
- Guttentag, D. (2015). Airbnb: disruptive innovation and the rise of an informal tourism accommodation sector, *Current Issues in Tourism* 18(12): 1192–1217.
- Gyódi, K. (2023). The spatial patterns of Airbnb offers, hotels and attractions: are professional hosts taking over cities?, *Current Issues in Tourism* pp. 1–26.
- Hassanli, N., Small, J. and Darcy, S. (2022). The representation of Airbnb in newspapers: a critical discourse analysis, *Current Issues in Tourism* 25(19): 3186–3198.

- Jain, S., Proserpio, D., Quattrone, G. and Quercia, D. (2021). Nowcasting gentrification using airbnb data, *Proceedings of the ACM on Human-Computer Interaction* 5(CSCW1): 1–21.
- Jordan, E. J. and Moore, J. (2018). An in-depth exploration of residents' perceived impacts of transient vacation rentals, *Journal of Travel & Tourism Marketing* 35(1): 90–101.
- Kadi, J., Plank, L. and Seidl, R. (2022). Airbnb as a tool for inclusive tourism?, *Tourism Geographies* 24(4-5): 669–691.
- Ki, D. and Lee, S. (2019). Spatial distribution and location characteristics of Airbnb in seoul, korea, *Sustainability* 11(15): 4108.
- Luo, Y., Zhou, X. and Zhou, Y. (2019). Predicting airbnb listing price across different cities, *Highlights Sci Eng Technol* .
- Morris, A. (2019). 'super-gentrification'triumphs: gentrification and the displacement of public housing tenants in sydney's inner-city, *Housing studies* 34(7): 1071–1088.
- Nieuwland, S. and Van Melik, R. (2020). Regulating airbnb: how cities deal with perceived negative externalities of short-term rentals, *Current issues in tourism* 23(7): 811–825.
- Palos-Sanchez, P. R. and Correia, M. B. (2018). The collaborative economy based analysis of demand: Study of airbnb case in spain and portugal, *Journal of theoretical and applied electronic commerce research* 13(3): 85–98.
- Pareja-Eastaway, M. and S'anchez-Mart'inez, T. (2022). Private rented market in spain: can regulation solve the problem?, *International Journal of Housing Policy* pp. 1–25.
- Perez-Sanchez, V. R., Serrano-Estrada, L., Marti, P. and Mora-Garcia, R.-T. (2018). The what, where, and why of airbnb price determinants, *Sustainability* 10(12): 4596.
- Petruzzi, M. A., Marques, G. S., do Carmo, M. and Correia, A. (2020). Airbnb and neighbourhoods: an exploratory study, *International Journal of Tourism Cities* 6(1): 72–89.
- Quattrone, G., Grotorex, A., Quercia, D., Capra, L. and Musolesi, M. (2018). Analyzing and predicting the spatial penetration of airbnb in us cities, *EPJ Data Science* 7(1): 31.
- Stors, N. (2022). Constructing new urban tourism space through airbnb, *Tourism geographies* 24(4-5): 692–715.
- S'ykora, J. and Špačková, P. (2022). Neighbourhood at the crossroads: differentiation in residential change and gentrification in a post-socialist inner-city neighbourhood, *Housing Studies* 37(5): 693–719.
- Tang, E. and Sangani, K. (2015). Neighborhood and price prediction for san francisco airbnb listings, *Departments of Computer science, Psychology, economics–Stanford University* pp. 021–01.
- Voltes-Dorta, A. and S'anchez-Medina, A. (2020). Drivers of airbnb prices according to property/room type, season and location: A regression approach, *Journal of Hospitality and Tourism Management* 45: 266–275.
- Wachsmuth, D. and Weisler, A. (2018). Airbnb and the rent gap: Gentrification through the sharing economy, *Environment and planning A: economy and space* 50(6): 1147–1170.
- Wang, Y., Livingston, M., McArthur, D. P. and Bailey, N. (2023). The challenges of measuring the short-term rental market: an analysis of open data on airbnb activity, *Housing Studies* pp. 1–20.
- Wang, Y., Livingston, M., McArthur, D. P. and Bailey, N. (2024). Enhancing our un-derstanding of short-term rental activity: A daily scrape-based approach for airbnb listings, *Plos one* 19(2): e0298131.
- Wegmann, J. and Jiao, J. (2017). Taming airbnb: Toward guiding principles for local regulation of urban vacation rentals based on empirical results from five us cities, *Land use policy* 69: 494–501.

Appendix

Appendix Table 1: Characteristics of Top 10 districts in Seoul

Rank	District code	District	Characteristics
1	11140660	Seogyo	Vibrant arts and culture scene
2	11230640	Yeoksam	Hipster haven with lively cafes
3	11140710	Yeonnam	Dynamic business and tech hub
4	11020550	Myeongdong	Tourism and nightlife Hub
5	11130750	Shinchon	Quiet residential with historic sites
6	11030710	Cheongpa	Train station and tourism spot
7	11030650	Itaewon-1	Diverse and international nightlife
8	11030530	Namyeong	Guest houses with local charm
9	11010610	Jongno	Historic center of Seoul
10	11020540	Hoehyeon	Traditional markets and culture



Appendix Figure 1: Monthly trend of Airbnb listings in every administrative districts in Seoul

Exploring Portugal's Wine Tourism: Tradition, Culture, and Future Opportunities

Teresa Pataco and Mónica Oliveira

School of Hospitality and Tourism, ESHT, Polytechnic Institute of Porto, Portugal

tpataco@esht.ipp.pt

monicaoliveira@esht.ipp.pt

Abstract: Our paper examines the successful realm of wine tourism in Portugal, focusing on the country's 14 distinct wine regions. Recognized for its rich winemaking tradition and diverse terroirs, Portugal stands out as a premier destination for wine enthusiasts around the world. This research evaluates how each region's unique identity, cultural heritage, and breathtaking landscapes contribute to its image as a desirable tourist destination. Portugal's 14 wine regions include the renowned Douro Valley, known for its exquisite Port wine, and Alentejo, celebrated for its robust reds, each offer a unique palette of flavors and experiences. These regions are not only rich in wine production but are also steeped in cultural and historical significance, which enhances their appeal. Whether it's the sun-drenched vineyards of the Algarve or the verdant fields of Minho, these landscapes offer more than just wine; they offer stories embedded in centuries of tradition. The variety and quality of accommodation available cater specifically to the needs of wine tourists. Visitors can choose from a range of options, such as luxurious vineyard estates where they can immerse themselves in the winemaking process, or charming rural lodges that offer a more intimate connection with the local culture. These hospitality options often include gourmet dining experiences that pair regional dishes with local wines, as well as activities like vineyard tours and wine tasting sessions that educate guests on the nuances of wine production. In positioning these regions within the wine tourism segment, this paper highlights Portugal's prowess in attracting both domestic and international visitors. The increasing interest from countries around the world underscores the country's significant role in the global wine tourism market. However, the regions face challenges such as maintaining sustainability and navigating economic fluctuations. Addressing these issues, alongside embracing digital marketing strategies, presents growth opportunities in a competitive market, helping to further establish Portugal as a leading wine tourism destination. These insights will help craft strategic marketing initiatives and improve infrastructure, while providing invaluable insights for stakeholders such as regional tourism boards, hospitality providers, and wine estates. By understanding and capitalizing on the regions' unique strengths, these stakeholders can effectively enhance their appeal, ensuring a thriving future for Portugal's wine tourism industry.

Keywords: Portuguese wine tourism, Wine regions, Sustainability, Economic challenges, Cultural heritage

1. Introduction

"The demarcated region was established in 1756 and is one of the oldest in the world. The history of this people and this territory has therefore always been marked by the presence of wine production and the cultivation of vines, which has become a distinctive feature of local culture. There are groups, classes, immigration, migration, dwellings and social logics in the region that are based on the heritage characteristics, which in turn are influenced by oenological traditions. Even today, there are still descendants of national and foreign families in the region who have worked the land for centuries and produced wine with a worldwide reputation." (Inácio, 2018 – **our translation**)

Wine tourism has become a dynamic and significant chapter in the global tourism landscape, merging gastronomy, culture, and travel into an enriching experience for enthusiasts. As travelers seek authentic encounters with local traditions and artisanal practices, the appeal of immersing oneself in the world of viticulture has surged (Yadav and Dixit, 2023). Among the numerous wine tourism destinations across the globe, Portugal commands attention due to its rich and storied winemaking traditions, coupled with a diverse and captivating landscape (Freitas et al, 2022). This small yet renowned country is home to 14 distinct wine regions, each providing a unique tapestry of flavors, cultural history, and breathtaking natural vistas. From the iconic Douro Valley, celebrated for its world-famous Port wines, to the rolling hills of Alentejo known for their robust reds, Portugal's wine regions offer an invitation to immerse oneself in a narrative that transcends mere taste (<https://winesofportugal.com/en/discover/wine-regions/>).

Every region in Portugal offers more than just exceptional wines; they present stories and experiences embedded in centuries of tradition. The sunlit vineyards of the Algarve, the enchanting terraces of Madeira, and the lush, green expanses of Minho embody the country's geographical diversity and the profound connection between its people and the land. These regions showcase not only the oenological riches of Portugal but also the cultural and historical richness, providing a backdrop to unforgettable travel experiences for wine enthusiasts from around the world (Turismo de Portugal, I.P. 2023).

2. Overview of Portugal's Wine Regions

[illegible]

Figure 1: Portuguese wine regions and their top wine varieties

Vinho Verde: Although often categorized under the Minho region (characterized by its lush, green landscape and cooler, wetter climate), it deserves special mention due to its distinctive wines. This region specializes in low-alcohol, slightly effervescent wines, with Alvarinho and Loureiro being predominant grape varieties. The cool and humid climate produces wines that are fresh, fruity, and vibrant, making them highly sought after.

Trás-os-Montes: Located in the northeast, Trás-os-Montes is known for its rugged landscape and rich history of winemaking. The region produces both red and white wines, with key varieties including Touriga Nacional, Tinta Amarela, and Verdelho. The cold winters and hot summers create a unique climate ideal for growing a wide range of grapes, resulting in wines that express the region's diverse terroir.

Távora-Varosa: Owing to its unique morphological features as a high-altitude valley, this small region is particularly well-suited for sparkling wine production. In 1989, it became the first national wine region designated to produce DOC sparkling wine.

Dão: Nestled in the mountainous terrain in the North, Dão has a cooler climate that allows grapes to ripen slowly, resulting in elegant and complex wines. Renowned for its red wines, particularly those made from Touriga Nacional and Jaen, the region also produces remarkable whites, mainly from Encruzado and Bical grapes. The granite soils here impart a distinctive minerality, contributing to the wine's character.

Bairrada: Located near the Atlantic coast, Bairrada is recognized for its traditional sparkling wines made from the Baga grape. The region also produces full-bodied red wines with a reputation for ageability. Bairrada's clay-limestone soils and maritime influence moderate the climate, providing a conducive environment for the slow maturation of grapes.

Beira Interior: Located in the centre, its features include mountainous terrain and varied microclimates. The region has a rich winemaking tradition, producing both red and white wines. Key grape varieties include the indigenous Tinta Roriz and Jaen for reds, and the white grape Fonte Cal and Arinto for whites. The high altitudes and diverse soils allow to produce wines with excellent acidity and complexity.

Lisboa: which encompasses a variety of sub-regions, is celebrated for its diverse range of wines produced from indigenous and international grape varieties. The region's proximity to the Atlantic Ocean lends a maritime climate that influences the flavor profiles of the wines. Notable grape varieties include Aragonês, Castelão, and Fernão Pires, producing both red and white wines with bright acidity and fresh fruit flavors.

Tejo: located along the river bearing the same name, has a diverse terroir that allows various grape varieties to thrive. The region produces reds from Castelão and Syrah, as well as whites from Fernão Pires and Arinto. The climate, influenced by river proximity and coastal breezes, creates a balance of fruity and structured wines, appealing to various palates.

Setúbal: The Setúbal Peninsula is renowned for its high-quality Muscat wines, particularly Muscat of Setúbal, a sweet, aromatic dessert wine made from muscat grapes grown in the sandy soils of the region. The climate, influenced by the nearby Atlantic, helps to create a rich flavor profile. The region also produces robust red wines, primarily from the Castelão grape, which thrive in its warm climate.

Alentejo: is known for its vast plains and Mediterranean climate, originating rich, robust red wines. The primary grape varieties include Aragonez (Tempranillo), Trincadeira, and Antão Vaz. The region's winemaking combines traditional practices with modern techniques, resulting in both quality and diversity in wines. Alentejo's warm climate and fertile soils yield fruit-forward wines that are popular among wine enthusiasts.

Algarve: Primarily recognized for its tourism, the Algarve region also produces a growing number of quality wines. The warm Mediterranean climate nurtures grape varieties such as Aragonez, Tinta Barroca, and Castelão for red wines, and Verdelho and Arinto for whites. The region's diverse topography, including hills and valleys, contributes to the production of fruity and approachable wines, making them a delightful complement to the local cuisine.

Azores: Pico, situated in the Azores, is known for its unique vineyard practices due to the island's volcanic soil and challenging climate. The vines are planted in low stone walls to protect them from strong winds and harsh weather. Key grape varieties include Verdelho and Arinto for whites, producing aromatic wines with mineral characteristics, and the red grape Negra Mole. The region's distinctive wines reflect the volcanic terroir and traditional winemaking techniques, making them truly exceptional.

Madeira: is known for its unique fortified wines characterized by their high acidity and oxidative aging process. The region features volcanic soils and a challenging, mountainous terrain, leading to the cultivation of grapes

such as Sercial, Verdelho, Boal, and Malvasia. These wines are celebrated worldwide for their complex flavors and remarkable longevity.

As is made clear from the depictions above, the country's varied climate creates numerous microclimates conducive to different grape varieties; the interplay between soil composition, geography, and climate across regions results in an impressive spectrum of wine styles and flavors. This diversity enables winemakers to cultivate various grape varieties that might not thrive in a more uniform setting, allowing for a rich expression of terroir across the country.

Additionally, traditional vineyard practices, such as bush vines in the Douro and trellising in Alentejo, further influence the aromatic profiles and flavor complexities of the wines produced. Local winemakers are increasingly integrating innovative techniques with traditional methods to enhance quality, while preserving the essence of their unique regional identities (Liberato et al, 2023).

3. Cultural and Historical Significance of Winemaking in Portugal

Winemaking in Portugal has a rich history of over 2,000 years, beginning with the Phoenicians who cultivated vineyards along its coasts. The tradition was solidified by Greek traders and the Romans, who recognized the potential of the region's climate and soil for viticulture. The Romans introduced systematic viticulture and winemaking techniques, expanding indigenous grape varieties and embedding wine into the Portuguese culture (Inglis, 2022).

By the Middle Ages, winemaking practices had evolved significantly, influenced heavily by monastic orders. Monks cultivated vineyards and produced wine for local use and ceremonies. The recognition of the Douro Valley as a wine region in the 18th century underscored Portugal's commitment to winemaking (Peralta et al, 2022). The emergence of the Port wine trade in the 1700s solidified Portugal's position in the global market, attracting merchants and boosting the economy.

In the 19th and early 20th centuries, Portugal's winemaking faced challenges, notably the phylloxera epidemic, which devastated vineyards across Europe (Pataco, Galanes-Santos and Silva, 2023). This crisis fostered modern practices, leading to replanting with disease-resistant varieties and improved techniques. Today, Portugal is celebrated for its diverse oenology, reflecting centuries of cultural and historical influences:

"A região demarcada existe desde 1756, sendo das mais antigas do mundo. A história deste povo e deste território foi, por isso, e desde sempre marcada pela presença da produção de vinho e pelo cultivo da vinha, assim tornado traço distintivo de cultura local. Existem grupos, classes, imigração, migração, habitares, lógicas de sociedade que na região se fundamentam nestas características de herança patrimonial que gira em torno do património enológico." (Inácio, 2018). (translation provided at the end of the article)

Portugal's cultural heritage is closely linked to its winemaking traditions, enriching the wine tourism experience. Wine symbolizes celebration and community identity (de Almeida Costa et al, 2021). Traditional wine festivals, such as the *Festa da vindima* in the Douro Valley and Alentejo's vintage celebrations, offer immersive experiences in local grape harvesting and winemaking, allowing tourists to connect with the community and appreciate wine's significance.

Countryside accommodation, local gastronomy, and winemaker services enable a comprehensive wine tourism experience that merges elements of Portugal's cultural heritage with the enjoyment of its wines. For instance, wine estates often host dinner events where regional dishes are paired expertly with local wines, while local handcrafted goods highlight the craftsmanship of the region (cf. <https://bacalhoa.pt/en/palacio-da-bacalhoa>).

One notable cultural practice is the "Lagares" method traditionally used in the Douro Valley, where participants tread grapes by foot to extract juice for Port wine production. This practice not only reflects the deep-rooted traditions of winemaking but also embodies community engagement, as locals come together to celebrate the harvest. Visitors participating in *lagares* experiences gain a firsthand appreciation of this age-old technique, while understanding its significance in the local culture (<https://www.winetourism.com/winery/quinta-da-sequeira/>). In Alentejo, the practice of "Azeite e Vinho," pairing local olive oil and wines, emphasizes the region's culinary heritage. Restaurants and wine estates offer tastings that feature these local products, showcasing the synergy between wine and food. These tastings enrich the experience for visitors, highlighting the traditional agricultural practices that underpin both products ([file:///C:/Users/Asus/Downloads/guias alentejo eng 9332762085ebeb0bed4e94.pdf](file:///C:/Users/Asus/Downloads/guias%20alentejo%20eng%209332762085ebeb0bed4e94.pdf)).

Additionally, the region of Setúbal proudly preserves the Muscat of Setúbal wine heritage through unique festivals that celebrate this sweet dessert wine. Events such as the Festa do Vinho de Setúbal allow visitors to explore the methods involved in making this distinctive wine while enjoying traditional music, dance, and local cuisine, which further deepens the cultural fabric of the region (<https://svp.wine/en/enoturismo/>).

Through these cultural practices and events, Portugal successfully integrates its rich historical background into the modern wine tourism experience. This interplay of heritage and contemporary winemaking not only enhances the visitor experience but also fosters a greater appreciation of Portugal's enduring connection to its winemaking traditions.

3.1 Range of Experiences Offered to Wine Tourists

A closer look at any of previous examples will demonstrate that wine tourism in Portugal has developed into a multifaceted experience that transcends mere wine tasting, offering visitors a unique blend of cultural immersion, culinary exploration, and authentic connections to the Portuguese terroir. These immersive activities foster a deeper understanding of the wine production process and create lasting memories. Additionally, specialised wine workshops are increasingly popular, offering tourists the chance to delve into the intricacies of wine production, blending, and tasting. These workshops often include guided tastings where participants can explore different varietals, learning to evaluate characteristics such as aroma, flavor profiles, and aging potential. These educational experiences provide a deep appreciation for the craftsmanship involved in winemaking and enhance the overall enjoyment of the wines.

Such varied and enriching offer has an impact on the accommodation made available for wine tourists in Portugal, as they cater to a range of preferences, allowing visitors to choose between luxurious vineyard estates, charming rural lodges, and boutique hotels. Staying at vineyard estates—often nestled among lush vineyards—provides guests with a unique opportunity to fully immerse themselves in the winemaking environment. These estates typically offer exclusive access to the property, personalized tours, and wine tastings led by knowledgeable staff who share the estate's history and practices. For example, many vineyard estates in the Douro Valley provide their guests with the experience of staying in elegantly restored wine lodges, where they can enjoy breathtaking views of the terraced vineyards, participate in on-site tastings, and indulge in locally sourced meals prepared with regional ingredients (<https://www.winetourism.com/winery/quinta-de-covela/>). These accommodation types often incorporate spa services and wellness programs, allowing guests to unwind while savoring the fruits of the vineyard.

Rural lodges also offer a cozy and authentic experience for wine tourists seeking a more intimate connection with local culture. These lodges often boast traditional architecture and décor, providing an authentic Portuguese atmosphere. Many offer home-cooked meals prepared with ingredients sourced from local farms and vineyards, allowing guests to experience the regional gastronomy that complements its wines. Furthermore, rural lodges are frequently situated near wineries, enabling easy access to tastings and tours for guests. These experiences not only elevate the appreciation of Portuguese wine but also foster connections between visitors and the rich traditions that underpin the country's winemaking success.

“Regarding the influence of wine tourism in the territory, it is fundamental and assumes a crucial role in the region, in a transversal way, since it is related to other activities, in which it assumes a role of dissemination throughout the world; it is a sector in full expansion attracting many tourists to the region and by anchoring the labor force within the territory, because it also provides business activity to those who live there.” (Liberato et al, 2023)

4. Economic Benefits of Wine Tourism for Portugal

Wine tourism has emerged as a significant contributor to Portugal's economy, providing numerous benefits that extend beyond the vineyards. The industry generates substantial revenue through direct spending by tourists on wine purchases, accommodations, dining, and experiences, contributing to local economies, particularly in rural regions where many vineyards are located. According to Pinto (2023), Portugal is the second most visited wine tourism destination, and the sector will be worth 30 billion dollars in revenue by 2030. Worldwide, the wine tourism market is expected to grow 4.01% between 2024 and 2032, reaching a staggering \$15bn in market value (<https://www.marketresearchfuture.com/reports/wine-tourism-market-36889>).

It goes without saying that the economic benefits of wine tourism also manifest in job creation, with thousands of direct and indirect jobs linked to hospitality, winemaking, and the supporting services sector. Wineries often hire local staff for vineyard management, winery tours, and hospitality services, fostering

community development and ensuring that wealth generated from tourism supports local economies (Mazurek, 2022). This infusion of income plays a significant role in revitalizing rural areas and preserving traditional agricultural practices.

Additionally, wine tourism encourages the growth of ancillary industries, including food production, artisanal crafts, and transportation services. As wine tourists often seek local culinary experiences, there is increased demand for regional food and products, thereby supporting local farmers, chefs, and artisans. This symbiotic relationship enhances the overall appeal of wine tourism as tourists are drawn to not only the wines but also the rich culinary heritage of Portugal (Salvado and Monteiro, 2024).

Portugal has carved out a unique position within the global wine tourism market, gaining prominence as a destination for wine enthusiasts, especially with increasing international recognition of its high-quality wines, particularly Port, Vinho Verde, and Douro wines. The outstanding quality of Portuguese wines has led to numerous awards and accolades, which in turn attract wine tourists keen to explore the origins of these celebrated products ([https://www.greatwinecapitals.com/best-of-wine-tourism/? region filter=porto-portugal](https://www.greatwinecapitals.com/best-of-wine-tourism/?region_filter=porto-portugal)) .

Portugal's strategic marketing initiatives have further enhanced its global visibility as a wine tourism destination. Collaborative efforts between the Portuguese National Tourism Authority (Turismo de Portugal, I.P.), regional tourism boards, and wine producers have led to campaigns that showcase the richness of the Portuguese wine culture, emphasizing unique experiences, landscapes, and the accessibility of its wine regions. Regional wine festivals, tasting events, and promotional partnerships have positioned the country as an attractive destination, enhancing its competitive edge in a crowded market.

4.1 Challenges to Portuguese Wine Tourism

Despite the successes of wine tourism in Portugal, the industry faces several challenges that must be addressed to sustain growth and maintain competitiveness in the global market. Economic fluctuations, particularly those linked to global events such as economic downturns or pandemics, can significantly impact tourism numbers. For instance, the COVID-19 pandemic severely disrupted travel and hospitality sectors worldwide, and while recovery is clearly underway, fluctuations in international travel can still affect visitor numbers and revenue streams.

Competition from other wine-producing countries poses another challenge for Portugal. Nations such as France, Italy, and Spain have long-established reputations as premier wine tourism destinations, often capturing a significant share of the global tourist market. To compete effectively, Portugal must continue to innovate and diversify its offerings while highlighting the unique characteristics of its wine regions. Investing in the development of new tourism experiences, sustainable practices, and enhanced visitor engagement is essential to differentiate Portugal from its competitors

“Considering the future of the wine tourism sector, the strategies include the valorization of the destination, through the differentiation for the quality and innovation of new proposals, as for the creation of tourism routes, or new hotels involved with the landscape, by the wine diversity, by its history. The regions must enhance their brand image, taking advantage of wine tourism, the characteristics of its wine, along with its gastronomy, their endogenous resources, and in this sense provide unique experiences, to disseminate and promote tourism in the region and in turn the economic impact.” (Liberato et al, 2023)

Moreover, sustainability presents a critical challenge for the wine tourism industry as consumer preferences increasingly favor environmentally responsible practices. Wine producers and tourism operators must navigate the complexities of sustainable development while maintaining the quality of their products and experiences. Balancing visitor influx with environmental preservation and the needs of local communities is vital for ensuring the long-term success of wine tourism in Portugal.

4.1.1 Sustainability in wine tourism

In recent years, sustainability has emerged as a critical concern within the wine tourism sector, reflecting a growing recognition of the need to balance economic development with environmental stewardship. According to Sottini et al (2021) the wine industry is significantly affected by climate change, with rising temperatures, erratic weather patterns, and increased occurrences of extreme weather events posing direct threats to vineyards and grape production. Portuguese wine regions, often characterized by their unique

terroirs, rely heavily on specific climatic conditions for optimal grape cultivation. Changes in temperature and precipitation can disrupt traditional growing cycles, diminishing grape quality and yields.

Additionally, many wine regions face pressure from tourism itself. An influx of visitors can strain local resources, including water supplies and waste management systems, particularly in rural areas that may already have limited infrastructure. The environmental impact of increased tourism—such as soil erosion, habitat disruption, and pollution—must be addressed to maintain the delicate balance between attracting wine tourists and preserving the natural surroundings that make these regions appealing.

Economic factors further complicate sustainability efforts. Many wine producers are often small-scale and depend on the income generated from tourism. As such, there can be resistance to adopting sustainable practices that may incur upfront costs or require changes to established production methods. This situation emphasizes the need for support and incentives to help producers transition to more sustainable practices that align economic viability with environmental responsibility (Filopoulos and Fritella, 2019).

To address these challenges, various initiatives and strategies have been developed within Portugal's wine tourism sector to promote sustainability. One key approach has been the implementation of Integrated Pest Management (IPM) practices, which reduce reliance on chemical pesticides and fertilizers while promoting biodiversity within vineyards (<https://www.ivv.gov.pt/np4/10374.html#1>). By fostering healthy ecosystems, these practices not only enhance vine health but also mitigate environmental impacts, thereby attracting environmentally conscious tourists.

Another significant initiative is the adoption of organic and biodynamic viticulture. Many producers are transitioning to organic farming methods, which prioritize natural processes and materials and reduce the environmental footprint of wine production (<https://www.portugalexporta.pt/noticias/certificacao-sustentabilidade-setor-vitivinicola>). Certifications such as Bio or Demeter indicate compliance with sustainable practices, appealing to a growing market segment of eco-conscious consumers. This shift not only supports biodiversity and soil health but also enhances the wine's marketability in an increasingly competitive global market.

Furthermore, numerous wine estates have pioneered initiatives to reduce water usage and implement water recycling techniques. Given the importance of water management in viticulture, many regions have invested in technologies such as drip irrigation and rainwater harvesting systems (https://www.isa.ulisboa.pt/files/leaf/pub/Voz_do_campo_2.pdf). These practices minimize water waste and help ensure adequate resources for grape cultivation even in periods of drought.

4.1.2 Digital marketing and wine tourism

According to Levitskaia, Ianioglo and Curaxina (2020) digital marketing has emerged as a vital tool for enhancing visibility and attracting tourists in the wine tourism sector. For Portugal's wine tourism industry, leveraging technology and innovative marketing strategies is essential for reaching a global audience, engaging potential visitors, and enhancing visitor experiences. As consumer behaviors increasingly shift towards online research and booking, the effective implementation of digital marketing strategies is paramount for driving growth within the sector.

Digital marketing offers wine tourism stakeholders—ranging from wineries and tour operators to regional tourism boards—a robust platform for enhancing their visibility in a competitive marketplace. Social media platforms, search engine optimization (SEO), email marketing, and targeted online advertising have become indispensable tools for reaching potential tourists in diverse markets.

Social media, especially platforms like Instagram, Facebook, and Pinterest, plays a significant role in shaping travel trends and influencing consumer decisions. Engaging visual content that showcases the stunning landscapes of Portugal's wine regions, highlights local wines, and features unique tourism experiences can captivate potential visitors, creating a desire to explore the destination firsthand. By utilizing user-generated content, wineries can further amplify their reach; photographs and testimonials shared by happy visitors serve as authentic endorsements that resonate with other potential tourists.

In addition to social media, search engine optimization is fundamental in ensuring that wine tourism-related websites rank highly in search results. By optimizing their websites with relevant keywords, such as "wine tours in Portugal" or "Douro Valley tastings," tourism providers can enhance their online visibility and attract organic traffic. This increased visibility not only elevates brand awareness but also directly contributes to higher booking rates (<https://seo.ai/blog/seo-for-wine-estates>).

Furthermore, email marketing campaigns allow wineries and tourism operators to maintain contact with past visitors and engage potential tourists. Personalized communication, tailored offers, and updates about upcoming events can help nurture relationships and encourage repeat visits. By providing valuable content, such as wine recommendations, pairing tips, or exclusive invites to wine tastings, businesses can position themselves as authorities in the field, fostering an ongoing connection with their audience.

The digital landscape presents numerous growth opportunities for wine tourism through technology and innovation. Amarendra and Das (2022) analyzed the rise of virtual wine experiences, which gained traction during the COVID-19 pandemic as a means of connecting with customers while travel restrictions were in place. Virtual tastings, vineyard tours, and wine education sessions allow participants to engage with wineries from the comfort of their homes, thus expanding the audience and providing a new revenue stream. This approach not only keeps potential tourists connected with the brand but also serves as an effective marketing tool to entice them to visit in person in the future.

Additionally, the integration of mobile applications offers significant potential for enhancing visitor experiences in wine tourism. Apps that provide detailed information about wineries allow users to plan itineraries and enable online bookings to streamline the wine tourism experience. Features such as interactive vineyard maps, augmented reality (AR) applications, and wine pairing suggestions enhance the visitor experience and encourage exploration while promoting local businesses.

Emerging technologies, such as artificial intelligence (AI) and data analytics, can further contribute to growth by enabling personalized marketing strategies. By analysing consumer behavior, preferences, and feedback, businesses can tailor their marketing efforts to meet the specific needs and desires of their target audiences. Moreover, collaborating with travel influencers and bloggers can expand the reach of wine tourism promotions. Influencers who authentically share their experiences can create a buzz around lesser-known wine regions and unique offerings, inspiring their followers to explore beyond mainstream wine destinations.

5. Recommendations for Enhancing Wine Tourism in Portugal

As Portugal's wine tourism sector continues to grow and evolve, stakeholders—including tourism boards, wine producers, and hospitality providers—must adopt strategic approaches to enhance the appeal and competitiveness of their offerings. Below, we put forward several recommendations for stakeholders, which according to our literature analysis could be as follows:

- Stakeholders should create collaborative marketing campaigns that highlight the distinct offerings of Portugal's wine regions. By pooling resources, tourism boards and wine estates can develop joint advertising efforts that showcase the diversity of wines, cultural experiences, and natural beauty of each region. For instance, a marketing campaign promoting wine routes that connect several wineries, local restaurants, and cultural landmarks can encourage visitors to explore beyond a single destination, thereby increasing overall tourism revenue.
- Tourism boards can create thematic wine tours that focus on specific aspects of wine culture, such as historical winemaking practices, organic and sustainable production, or culinary pairings. These tours can provide visitors with immersive and educational experiences, deepening their appreciation of Portuguese wine and culture. Additionally, emphasizing themes that align with current consumer interests, such as sustainability and local gastronomy, can attract niche markets seeking authentic experiences.
- Stakeholders should invest in sophisticated digital marketing strategies to enhance their online presence. This includes optimizing websites for search engines, utilizing social media platforms to engage with potential visitors, and employing data analytics to tailor marketing efforts.
- Introducing certification programs for wineries and hospitality providers can promote quality and consistency across the wine tourism sector. Such programs could recognize establishments that meet specific sustainability and service standards, enhancing credibility and attracting eco-conscious travelers. A "Certified Sustainable Wine Tourism" label could become a selling point, helping to distinguish Portuguese offerings in a crowded market.
- To accommodate an increasing number of visitors, it is crucial for regional governments to invest in infrastructure improvements. This might include better road access to remote wineries, the establishment of transportation services for wine tourists, and enhancements in signage and information centers to guide visitors. Upgrading facilities, including tasting rooms and

accommodation options, can provide a more comfortable and enjoyable experience, encouraging longer stays.

6. Concluding Remarks

Portugal's wine tourism sector embodies a rich tapestry woven from the country's historical legacy, cultural heritage, and diverse landscapes, positioning it as a premier destination for wine enthusiasts worldwide. This paper has explored the multifaceted dimensions of wine tourism in Portugal, unveiling significant insights into the economic impact, cultural significance, sustainability challenges, and digital marketing opportunities that shape this thriving industry.

Through the necessarily brief examination of Portugal's 14 distinct wine regions, we have identified the unique strengths that each region brings to the wine tourism experience. The emphasis on local gastronomy further enriches the wine tourism experience, allowing tourists to engage not only with the wines themselves but also with the culture, traditions, and people that produce them.

The economic benefits of wine tourism have been highlighted as a key driver for local and regional economies in Portugal. With millions of visitors drawn to the country and substantial income generated from wine-related activities, the industry plays a crucial role in job creation and supporting local communities. By fostering collaborative marketing initiatives, enhancing digital engagement, and investing in infrastructure, stakeholders can capitalize on these benefits, ensuring the sustainable growth of the sector.

Importantly, as the paper discussed, the challenges of sustainability pose significant threats to the long-term viability of wine tourism in Portugal. Climate change and resource management, coupled with the pressures of increasing tourism, necessitate a proactive approach to sustainability. This requires the integration of best practices in sustainable viticulture and tourism, as well as a commitment to preserving the unique terroirs that define Portugal's wine regions.

As digital marketing continues to play an essential role in attracting tourists, there is significant potential for leveraging technology to enhance the wine tourism experience. The exploration of emerging trends, such as virtual tastings and interactive mobile applications, offers exciting prospects for engaging a broader audience.

Looking ahead, future areas of research should focus on investigating the impact of climate change on grape cultivation and winemaking, understanding consumer preferences for sustainability in wine tourism, and exploring how technology can further innovate visitor experiences. Additionally, comparative studies with other leading wine tourism destinations could offer valuable insights into best practices and strategies for growth.

References

- Amarendra, B. and Das, A. K. (2022). Adapting for Resilience: Exploring the Advent of Virtual Experiences in Pandemic-era Wine Tourism Offerings. *Athens Journal of Tourism*, Volume 9, Issue 4, (pp. 209-226).
- de Almeida Costa, A. I., Marano-Marcolini, C., Malfeito-Ferreira, M., and Loureiro, V. (2021). Historical Wines of Portugal: The Classification, Consumer Associations and Marketing Implications. *Foods*, 10(5), 979.
<https://doi.org/10.3390/foods10050979>
- Filopoulos, S. and Frittella, N. (2019). Designing Sustainable And Responsible Wine Tourism Experiences, *BIO Web Conf.*, Vol. 12, <https://doi.org/10.1051/bioconf/20191203006>
- Freitas, I. V., Ramazanov, M., Albuquerque, H. and Soares, P. (2022). Traditional Wine Landscape As A Rural Heritage: Portuguese Verde Wine Vineyards. In C. Silva, M. Oliveira, & S. Silva (Eds.), *Proceedings of the 5th International Conference on Tourism Research (ICTR 2022)*, (pp. 459-468). Acil. <http://hdl.handle.net/11328/4139>
- Gómez-Carmona, D., Paramio, A., Cruces-Montes, S., Marín-Dueñas, P. P., Aguirre Montero, A. and Romero-Moreno, A. (2023). The Effect Of The Wine Tourism Experience, *Journal of Destination Marketing & Management*, 29, 100793, <https://doi.org/10.1016/j.jdmm.2023.100793>
- Inglis, D. (2022). On Divine Wine. In P. Howland (Ed.), *Wine And The Gift: From Production To Consumption* (1st ed.). Routledge. <https://doi.org/10.4324/9781003038986>
- Inácio, A. (2018). The Wine Museums in Portugal: Communicating The Past And Understanding And (Re) Building The Wine Cultural Heritage, *Revista Lusófona de Estudos Culturais*, 5(2), (pp.199-211).
<https://rlec.pt/index.php/rlec/article/view/1844/1914>
- Liberato, D., Sousa, B., Paiga, H. and Liberato, P. (2023). Enoturismo E Tendências de Competitividade: Perspetivas do Contexto Português. *E-Revista De Estudos Interculturais*, (11). <https://doi.org/10.34630/e-rei.vi11.5333>
- Levitskaia, A., Ianioglo, N. and Curaxina, S. (2020). Digital Marketing Strategy Approach in Wine Tourism: Tradition Versus Innovation. *Marketing and Digital Technologies*, 4(3), 6-12.

- Mazurek, M. (2022). Importance of Wine Tours and Cultural Activities in Events Organized in Canada And Slovakia Wineries. *Journal of Event, Tourism and Hospitality Studies*, 2(1), 33-53. <https://doi.org/10.32890/jeth2022.2.2>
- Pataco, T., Galanes-Santos, I. and Silva, M. (2023). Communicating (In) Wine Tourism: What Are the Paths for Harmonising the Sector and the Translation Process? In V. Carreira, C. Plag & C. Carapinha (Eds.), *Os Discursos do Turismo e os Desafios da sua Tradução* (pp. 225-263). Imprensa da Universidade de Coimbra. <https://doi.org/10.14195/978-989-26-2430-3>
- Peralta, N., Aulet, S. and Vidal-Casellas, D. (2022). Wine And Monasteries: Benedictine Monasteries in Europe. *Journal of Foodservice Business Research*, 25, 1-32. <https://doi.org/10.1080/15378020.2021.2024785>
- Pinto, I. (2023, 19 agosto). Enoturismo. *Dinheiro Vivo*. <https://www.dinheirovivo.pt/economia/enoturismo-portugal-e-o-2-maior-destino-mundial-de-um-mercado-que-valera-30-mil-milhoes-em-2030--16874172.html/>
- Salvado, J. and Monteiro, B. (2024). Sinergias entre os Património Alimentares Vinho e Azeite na Experiência Enoturística: Análise de Websites Corporativos. *Via Tourism Review*, 25. <https://doi.org/10.4000/123hd>
- Santos, F., Vavdinos, N. and Martínez, L. (2020). Progress and Prospects for Research of Wine Tourism in Portugal. *PASOS. Revista de Turismo y Patrimonio Cultural*. <https://doi.org/10.25145/j.pasos.2020.18.1>.
- Sottini, V. A., Barbierato, E., Bernetti, I., and Capecchi, I. (2021). Impact of Climate Change on Wine Tourism: An Approach through Social Media Data. *Sustainability*, 13(13), 7489. <https://doi.org/10.3390/su13137489>
- Turismo de Portugal, I.P. (2017). *Estratégia Turismo 2027: Liderar o Turismo do Futuro*. <https://www.turismodeportugal.pt/SiteCollectionDocuments/estrategia/estrategia-turismo-2027.pdf>
- Turismo de Portugal, I.P. (2023). TravelBI. <https://travelbi.turismodeportugal.pt/turismo-em-portugal/inquerito-enoturismo-2022/>
- Yadav, M. K. and Dixit, S. K. (2023). The Growth and Evolution of Global Wine Tourism. In S. K. Dixit (Ed.), *Routledge Handbook of Wine Tourism* (pp. 15-28). Routledge. <https://doi.org/10.4324/9781003143628>

The Critical Role of Cybersecurity Education in Health Tourism

Jyri Rajamäki, Paulinus Ofem, Annika Kallio and Miia Vakkuri

Laurea University of Applied Sciences, Espoo, Finland

Jyri.Rajamaki@laurea.fi

Paulinus.Ofem@laurea.fi

Annika.Kallio@laurea.fi

Miia.Vakkuri@laurea.fi

Abstract: Health tourism is expanding due to the availability of high-quality medical care at lower costs in various countries. With this growth comes an increasing need to enhance cybersecurity, as patient data and other sensitive information are vulnerable to cyberattacks, which can lead to identity theft, financial fraud, and privacy breaches. Therefore, robust cybersecurity measures are essential to protect patient data. One challenge is the international transfer of patient data. When patients travel across borders for medical treatment, their data must be securely transmitted between healthcare providers in different countries. This process introduces cybersecurity risks, and healthcare providers must implement strong encryption methods and secure communication channels. This paper discusses the vulnerabilities of information systems used in medical tourism and how they should be considered in higher education teaching. Many healthcare facilities rely on interconnected systems and devices like EHR and IoT to provide efficient care. However, these systems can be susceptible to cyberattacks if not properly secured. A case study on medical tourism in Finland illustrates the practical implications of these cybersecurity challenges. These examples highlight the importance of adopting best practices and successful cybersecurity strategies to safeguard patient information. Recommendations for improving cybersecurity for stakeholders in the medical tourism sector include investing in advanced cybersecurity technologies, providing regular staff training, and developing comprehensive cybersecurity policies. By prioritizing cybersecurity, medical tourism providers can maintain patient safety and trust, which are critical for the continued growth and success of the industry. The importance of cybersecurity training and education in the health and wellness sector and the tourism industry cannot be overstated. Ensuring that all stakeholders are aware of the risks and equipped with the knowledge to mitigate them is essential for protecting patient data and maintaining the integrity of medical tourism services.

Keywords: Health tourism, Cybersecurity, Education, Higher education institute, Case study

1. Introduction

Health tourism is an umbrella term that includes medical and wellbeing tourism. It refers to travel aimed at improving or maintaining health and wellbeing. Health tourism includes various health services, such as medical treatments, rehabilitation, and wellness (Tourism Teacher, 2023). Medical tourism is a subset of health tourism focusing on medical treatments and procedures. Medical tourists often travel abroad for more affordable or more readily available medical services, such as surgeries, dental care, or fertility treatments (Whitlock, 2022). Wellbeing tourism focuses more on holistic well-being and relaxation. Wellbeing tourism can include spa treatments, yoga, meditation, nature retreats, and other relaxing and rejuvenating experiences. The goal is to enhance the traveler's physical and mental well-being (Global Wellness Institute, 2024).

Laurea is a multidisciplinary university of applied sciences (UAS) that educates tourism, healthcare, and cybersecurity students. There is a notable lack of research that integrates these fields. This paper aims to fill this research gap and address the question: "How can cybersecurity in health tourism be effectively integrated and understood within the curricula of multidisciplinary higher education institutions?"

CyberSecPro is a EU-funded project that aims to encourage higher education institutes (HEIs) to enhance their capacity to prepare a new generation of workforce and to upskill the current workforce to address challenges in the cybersecurity ecosystem. From CyberSecPro's point of view, this paper aims to compile and document best practices for collaboration between HEIs and companies in offering practical training. These best practices will provide guidelines for expanding and delivering cybersecurity training in HEIs.

2. Literature Review

Health tourism, including medical and wellbeing tourism, focuses on improving travellers' physical and mental health. Faced with long waiting lists, the high cost of elective treatment, and fewer barriers to travel, the idea of availing healthcare in another country is gaining more significant appeal to many (Carrera & Bridges, 2006). Health tourism is an important sector of the tourism industry that offers a wide range of services and experiences to travelers, and it provides significant benefits to both travelers and the tourism industry (Zhong et al. 2021). Health tourism can improve travelers' health and well-being, provide new experiences, and help them relax and recover from everyday stress, thus promoting overall well-being. Additionally, this form of

tourism can promote the growth of the tourism industry and create new business opportunities. Health tourism can include various activities such as yoga, meditation, nature retreats, and spa treatments. Health tourism is one of today's thriving industry's most developed and growing sectors. It has increased its activity worldwide due to many social and economic circumstances that lead people to achieve and pursue a better quality of life (Quintela et al., 2016).

Medical tourism involves traveling to another country for medical procedures, such as surgeries, dental treatments, or fertility treatments. This form of tourism is particularly popular in countries where healthcare costs are high or certain treatments are unavailable. Medical tourism allows travelers to receive high-quality care at a more affordable price. However, a significant portion of medical tourism involves short-distance travel across nearby borders and from diasporas, often for less critical medical procedures, which contradicts common perceptions. Despite being part of a growing global medical industry, much of this tourism remains local and diasporic, closely tied to the broader tourism sector. Medical tourism companies, acting as intermediaries, have become increasingly important. Opportunities in this field are primarily spread through word of mouth, with the internet playing a secondary role. The quality and availability of care, along with economic and cultural factors, are major influences on the behavior of medical tourists (Connell, 2012).

Well-being tourism, also known as wellness tourism, integrates aspects of health and medical tourism with a focus on holistic well-being. This includes spa treatments, nutritious food, physical activities, and various wellness programs aimed at enhancing travelers' physical, mental, and emotional health. According to Dini and Pencarel (2021), wellness tourism encompasses ten key components: hot springs, spas, medical tourism, body and mind care, enogastronomy, sports, nature and environment, culture, spirituality, and events. These elements can be offered individually to specific market segments or combined into an integrated mix of tourism products (Dini & Pencarel, 2021).

However, health tourism encounters numerous challenges, one of which is the inconsistency in its various conceptual approaches and definitions (Quintela et al., 2016). On the other hand, a holistic view of wellness tourism impacts strategic marketing processes. Destination management organizations and company managers should segment their demand according to more innovative criteria than those traditionally used for wellness regarding healthcare and medical procedures. Value propositions for tourists should be wellness-driven to meet the growing demand for well-being, and they should involve the participation of all various actors and producers within the wellness tourism offer system at wellness destinations (Dini & Pencarel, 2021).

2.1 New Technologies in Health Tourism

2.1.1 International transfer of patient data

The international transfer of patient data is a crucial aspect of health tourism, but it faces several challenges. One of the primary issues is complying with data protection laws in different countries. For instance, the General Data Protection Regulation (GDPR) in the European Union imposes strict rules on transferring personal data, including health data, outside the EU. This can slow down research and treatment processes as data sharing becomes more complex and requires strict adherence to regulations. Bradford et al. (2020) examine the difficulty of exchanging health data between the USA and the EU and suggest that the United States seek an additional sector-specific adequacy decision based on the existing US health privacy law, the Health Insurance Portability and Accountability Act. This could also serve as a model for other third parties and facilitate the international harmonization of health data exchange.

Cloud computing holds significant promise for revolutionizing the healthcare sector. However, centralizing data in the cloud introduces various security and privacy challenges for patients and healthcare professionals. Maintaining the confidentiality of medical data exchanged between the sender and receiver is essential, which can be achieved through cryptography. It is crucial to employ advanced encryption techniques and secure communication channels to ensure data security. These measures protect patient data from breaches and hacking, which is vital for safeguarding patient privacy. Moreover, secure communication channels ensure that data is transferred swiftly and reliably between healthcare providers, enhancing continuity of care and patient safety (Selvakumar & Lokesh, 2024).

Electronic Health Records (EHR) systems are highly significant in health tourism, offering numerous benefits. They enable healthcare providers to access patient health information in real time, enhancing care coordination and reducing the risk of errors. EHR systems also reduce administrative tasks, such as paperwork, freeing up more time for patient care. By lowering the costs associated with paper-based systems and

preventing duplicate tests, EHR systems can lead to significant savings. Furthermore, patients can access their health information, helping them take a more active role in their care. In health tourism, EHR systems facilitate communication among healthcare providers, enabling better care coordination and reducing medical errors (Adeniyi et al., 2024).

However, there are several challenges associated with the use of EHR systems that can impact their effectiveness and adoption. Protecting patient data is paramount, and EHR systems can be vulnerable to data breaches and hacking. Implementing and maintaining EHR systems can be expensive, particularly for smaller healthcare organizations. Issues such as interoperability, data security, and provider burnout need to be addressed to fully realize the potential of EHRs in improving patient care and outcomes (Adeniyi et al., 2024). The complexity of these systems can pose challenges for healthcare professionals who are not accustomed to using technology. Inaccurate or incomplete data can lead to medical errors and affect patient safety. Additionally, using EHR systems can increase the workload for physicians, leading to burnout, and ongoing efforts are needed to address challenges and ensure the effective use of EHRs in healthcare delivery (Adeniyi et al., 2024).

2.1.2 Internet of medical things (IoMT)

Internet of Medical Things (IoMT) refers to applying the Internet of Things (IoT) in healthcare, enabling medical systems to connect various smart devices, such as wearable sensors, medical examination instruments, and hospital assets, for establishing an information platform (Huang et al., 2023). The Internet of Medical Things (IoMT) technology can be utilized in health tourism in various ways. IoMT devices, such as smart wristbands and other sensors, can monitor patients' health in real-time, allowing for remote diagnostics and treatment planning before the patient arrives at the destination. These devices can store and share patient data securely among different healthcare professionals, ensuring that the patient's medical history is always available, which improves the quality and continuity of care. IoMT devices can send alerts and real-time data in emergencies, enabling quick response and treatment even if the patient is far from home (Mathkor et al., 2024). Remote monitoring and diagnostics can reduce unnecessary doctor visits and hospital stays, making health tourism more cost-effective for patients and healthcare systems. IoMT devices can help patients monitor their health and take a more active role in their care, improving health outcomes and patient satisfaction.

Cybersecurity is a critical factor in using IoMT technology in health tourism. Data security and privacy are essential, as IoMT devices collect and transmit sensitive health information. Cybersecurity measures ensure that these data remain protected and confidential, which is crucial for safeguarding patient privacy. Reliable and uninterrupted operation of IoMT devices is vital, as patients need to trust the information provided by these devices and the care they receive. Cybersecurity helps prevent cyberattacks that could compromise patient safety in emergencies. For example, if IoMT devices are attacked, critical alerts could be prevented from reaching healthcare professionals. Compliance with regulatory requirements is necessary, and cybersecurity ensures that IoMT devices and their use meet these standards, which are essential for adhering to legal and ethical guidelines. When patients know that their health data are protected and that IoMT devices are safe to use, their trust in health tourism services increases, which can improve patient satisfaction and health outcomes. However, risks appearing from IoMT devices cannot easily fit into an existing risk assessment framework. While research has been done on this topic, little attention has been paid to the methodologies used for the risk assessment of heterogeneous IoMT devices (Pritika et al., 2023).

EHR and IoMT systems can be integrated in various ways to enhance healthcare efficiency and patient safety. IoMT devices can collect and transmit patient health data in real-time to EHR systems, enabling continuous monitoring and rapid response to potential health issues. Combining real-time data from IoMT devices with historical patient data in EHR systems allows healthcare professionals to gain a comprehensive view of the patient's health, aiding in more accurate diagnoses and personalized treatment plans. IoMT enables remote monitoring and care, which is particularly beneficial for managing chronic conditions and post-surgery care. Patient data can be updated in EHR systems in real-time, improving continuity of care and reducing the need for physical visits. IoMT devices can send data directly to EHR systems, reducing manual data entry errors and improving data accuracy, which enhances care coordination and patient safety. However, the lack of interoperability hampers the application of new data-processing techniques, such as data mining and online analytical processing, due to the heterogeneity of the data and the sources. Rubí and de Lira Gondi (2019) propose an IoMT platform for pervasive healthcare that ensures interoperability, quality of the detection process, and scalability in a Machine-to-Machine-based architecture and provides functionalities for the processing of high volumes of data, knowledge extraction, and common healthcare services. Their platform

uses the semantics described in OpenEHR for data quality evaluation and standardization of healthcare data stored by the association of IoMT devices and observations defined in OpenEHR (Rubí & de Lira Gondi, 2019).

In summary, integrating EHR and IoMT systems can significantly improve the quality and efficiency of healthcare by providing real-time monitoring, enhanced diagnostics and treatment, and better data security. New technologies in health tourism, such as telemedicine, wearable health technologies, health applications, virtual reality, artificial intelligence, and robotics, can significantly enhance the safety, efficiency, and patient experience. Cross-border EHR systems are key in leveraging these technologies, enabling better data sharing and care coordination across different countries.

2.2 Importance of Cybersecurity in Medical Tourism

Cybersecurity is a crucial part of the tourism industry because it protects the information and systems of travelers and businesses. Information security issues have become an important factor restricting tourism development (Mei et al., 2024). Lázaro's (2024) findings show that hotels and online travel agencies (OTAs) are constantly exposed to cyberattacks, especially by data breaches and malware attacks. These incidents have profound implications for both guests and tourism companies, as their vulnerabilities and consequences impact the reputation of the companies, the smart cities in which they operate, and consumer trust. The findings also revealed that most cyberattacks target the theft of private data belonging to companies and users, including email addresses, credit card numbers, security codes, expiration dates, and encoded magstripe data, among other types of information. Cyberattacks and cyber threats persist in travel and tourism, driven by hackers' desires for power, fame, and wealth (Lázaro, 2024).

Health tourism is an attractive target for cybercriminals since it handles large amounts of personal and financial data. It can be posited that this phenomenon integrates the cybersecurity challenges inherent in both the tourism industry and the medical field. The most common challenges of health tourism include (Briguest, 2024):

- Data breaches and leaks: Protecting patients' personal and medical information is critical, as data breaches can lead to identity theft and other harmful actions.
- Ransomware attacks: Medical institutions can be targeted by ransomware, where attackers encrypt the institution's data and demand a ransom for its release.
- Phishing attacks: Fraudulent messages and websites can trick patients or staff into disclosing sensitive information.

Nowadays, hyperconnectivity allows the tourism industry to leverage big data analytics as a competitive advantage in decision-making, product design, and precise marketing strategies for target segments. However, storing financial, organizational, and personal information in cyberspace and making it accessible to many users also exposes it to security risks such as phishing and hacking, which are common cybercrimes affecting the tourism sector (Arenas-Reséndiz et al., 2024). Due to these challenges, medical tourism services need to invest in strong cybersecurity measures, such as security training, advanced protection systems, and collaboration with authorities.

3. Methodology

This study employs Yin's (2019) case study research method to explore how cybersecurity in health tourism can be effectively integrated into the curricula of multidisciplinary higher education institutions. The research utilizes various data collection methods, including documents, interviews, and observations, to gather comprehensive information and ensure the accuracy of the findings through triangulation. The focus is on understanding cybersecurity training needs within the context of Finland's health tourism industry. The goal is to gain insights and find practical solutions rather than seeking a single truth or broad generalizations. The analysis primarily uses qualitative content analysis to summarize the collected material and identify key themes, relationships, and implications.

Using documents as research material in case studies is a common and effective method for gathering detailed, contextualized information (Yin, 2019). This study's sources of documents include various web pages, CyberSecPro deliverables, and Theseus, Finland's largest open-access repository for theses and publications from universities of applied sciences (AMKIT 2024).

The research seeks new perspectives on cybersecurity education in health tourism, using interviews as a key data collection method. Interviews are versatile and flexible, allowing for direct interaction and uncovering

hidden motives. Open interviews, which are informal and unstructured, aim to explore interviewees' thoughts, opinions, and perceptions.

In this study, professionals from the healthcare and cybersecurity sectors were interviewed:

- Four industry professionals discussed the current state of cybersecurity training and awareness in healthcare, focusing on staff awareness and training sufficiency.
- Three cybersecurity experts shared insights on implementing the European Cybersecurity Skills Framework (ECSF) in healthcare, emphasizing the importance of tailored cybersecurity protocols.

The authors, with extensive experience in healthcare (n=1), tourism (n=1), and cybersecurity (n=2), also contributed their observations to the research.

4. Case Background: Medical Tourism in Finland

Health tourism in Finland dates back to the 18th century, when spas were established, known for their healthy springs and mineral waters. Today, wellness tourism is a significant growth area, with Finland's strengths including clean nature, water, forests, the sauna experience, silence, and light. The COVID-19 pandemic has boosted interest in domestic travel and outdoor activities. (Lehto, 2021)

Medical tourism is also growing, attracting international patients with high-quality healthcare services. Finnish hospitals and clinics offer top-level care, quick access to treatment, and excellent outcomes. Notable examples include Docrates Cancer Center and Orton Oy. The Medical Tourism Association Finland (2025) aims to make Finland the leading medical tourism destination in the Nordic countries, highlighting strengths such as pioneering diagnostics and expert healthcare professionals.

Travel motives in health tourism can be narrow (treatment of illness) or broad (maintaining and promoting health). Wellness tourism motives include relaxation, a change of scenery, and exploring new places. Families with children are a key target group, and they are interested in nature destinations, spas, and active holidays. Their travel motives are influenced by family activities, ease, and safety, with social media playing a significant role in destination choice. Wellness tourism in Finland offers diverse opportunities, especially for families, with important factors being the destination's offerings, price, and ease. Development should consider families' needs and interests. (Lehto, 2021).

5. Findings

5.1 Impact of new Technologies on Health Tourism in Finland

Data Protection Practices and Legislation: International transfer of patient data requires strict adherence to data protection practices and legislation. In Finland, patient data is stored in the Kanta system, ensuring information security and availability. This system also allows for storing and handling patient data from abroad in the same manner as for Finnish patients.

Availability and Compatibility of Patient Data: Transferring patient data from abroad to Finland can improve the quality and continuity of care, as healthcare professionals can access necessary information about the patient's previous treatments. However, this requires that patient information systems are compatible and that data can be translated into the required languages.

Cybersecurity and Trust: International transfer of patient data demands high cybersecurity to maintain patient privacy and trust. This is particularly important in health tourism, where patients may be concerned about the security and use of their data.

Practical Challenges and Opportunities: Practical challenges of international patient data transfer include differences in legislation and data protection practices between countries. On the other hand, efficient data transfer can enhance the attractiveness and competitiveness of health tourism, as patients can trust they will receive high-quality care abroad.

Internet of Medical Things (IoMT):

- **Enhanced Patient Monitoring and Management:** Given Finland's advanced healthcare infrastructure, IoMT can significantly improve patient monitoring and management for international patients. This ensures personalized and high-quality care, a key attraction for health tourists.

- **Security and Privacy Concerns:** Finland strongly emphasizes data protection and privacy. Ensuring the cybersecurity of IoMT devices and systems is crucial to maintaining patient trust and complying with stringent data protection regulations.
- **Interoperability and Integration:** The ability to seamlessly integrate IoMT devices with existing healthcare systems is vital. Finland's robust digital health infrastructure can support the interoperability needed to provide continuous and coordinated care for international patients.
- **Regulatory and Compliance Issues:** Navigating the regulatory landscape is essential. Finland's adherence to high medical device regulation and data protection standards ensures that IoMT implementations meet international requirements, making it a reliable destination for health tourists.

The above-mentioned aspects highlight how IoMT can enhance the quality and security of health tourism services in Finland, making it an attractive destination for international patients. Our findings also indicate that international transfer of patient data can significantly impact health tourism in Finland by improving the quality of care and patient trust while also posing challenges related to cybersecurity and compliance with legislation.

5.2 CyberSecPro as Best Practice for Cybersecurity Workforce Skills Training

In order to fulfil its aim, the CyberSecPro project performed a market analysis of cybersecurity workforce skills in the EU. The market analysis report (Rathod et al., 2023) identified over 25 essential cybersecurity knowledge areas for health, energy, maritime and other sectors. It also identified over 25 workforce skills in demand in these major sectors. One of the significant outcomes of the study is the workforce skills gap between HEIs cybersecurity programs and workforce skills needed in the labour market. Through desk research, it was confirmed that the demand for skilled cybersecurity professionals surpasses the supply of cybersecurity professionals.

In addition to performing a cybersecurity market-driven analysis, it was instructive to analyse the cybersecurity education programs of all consortium partners and the tools they utilise to enhance their respective academic programs. The full report of the analyses is provided in (Lugo et al., 2023). Consortium partners' courses were evaluated for their applicability to different cybersecurity knowledge skills areas identified by Rathod et al., 2023. The courses were also matched with the European Cybersecurity Skills Framework (ECSF) to determine their level of coverage and alignment with the ECSF. However, it was found that while some courses covered the ECSF, several poorly covered the ECSF.

Based on the findings in (Rathod et al., 2023) and (Lugo et al., 2023), it was highly recommended that HEIs transform their academic offerings to address the cybersecurity workforce market challenges and increase investment in cybersecurity education and professional training. HEI providers should also collaborate with industry practitioners to enhance the cybersecurity workforce skills of all stakeholders in the ecosystem. HEIs' course materials and resources should also be revamped, considering continuous industry development and emerging technologies.

Informed by previous outcomes, relevance to ECSF, the availability of education and training resources, and the need to protect EU cyber-infrastructure and systems effectively, CyberSecPro further developed its professional cybersecurity training program requirements and various specifications (Lieberknecht et al., 2023). It identified 10 cybersecurity knowledge areas relevant to CyberSecPro's workforce skills development. To ensure that the CyberSecPro program is created based on well-established resources and expertise, current partners' academic offerings were mapped to the identified knowledge areas and essential selected cybersecurity training modules. The report also provides an analysis of the constraints and requirements necessary for the adoption of the CyberSecPro professional training program. These analyses include business, technical, legal, social and financial aspects. These outcomes served as the basis for further developing CyberSecPro's cybersecurity training modules. A dynamic curriculum management system (DCM) was proposed to enhance the training and make training resources available to trainees and trainers.

Armed with the lessons, recommendations and other outcomes from (Rathod et al., 2023; Lugo et al., 2023; Lieberknecht et al., 2023), especially the CyberSecPro requirements and specifications, D3.1 embarked on the actual development of CyberSecPro's main components and procedures. In this vein, 12 generic cybersecurity training modules were developed to enable trainees to gain the essential knowledge and skills required to succeed. These modules broadly cover the essentials and management of cybersecurity, emerging technologies and critical infrastructure security. The generic modules offer a firm foundation for cybersecurity principles and practices, a core cybersecurity capability within the CyberSecPro portfolio. The key concepts

included in these modules are threat intelligence, software and network security, data protection and privacy technologies, penetration testing, and risk management.

To address sector-specific training needs, CyberSecPro further developed a cybersecurity model syllabus for health (Kerllegis et al., 2024), energy (Alcaraz et al., 2024), and maritime (Kerllegis et al., 2024). The training modules for these targeted sectors are geared towards the peculiar cybersecurity challenges in these sectors, and trainees are equipped with knowledge, skills, and competencies to combat cybersecurity threats and vulnerabilities. A streamlined enrolment procedure was established to enable the recruitment and participation of targeted individuals in the program. The DCM facilitates this procedure. As part of efforts to enhance trainers' efficiency and organization, several templates and e-forms were developed in support of administrative processes. These templates include registration forms, trainers' and trainees' evaluation forms, and teaching materials, among others.

CyberSecPro developed and deployed the Dynamic Curriculum Management (DCM) system to ensure the training program remains relevant and up-to-date with the evolving cybersecurity ecosystem. The DCM helps keep the training content current and allows for identifying and monitoring cybersecurity labor market trends, emerging threats, and vulnerabilities.

Concerning the healthcare sector's cybersecurity training needs, as established in (Rathod et al., 2023), CyberSecPro developed a portfolio of curricula and syllabi to enhance the cybersecurity workforce skills of healthcare professionals. The specialized cybersecurity modules developed are based on the 12 CyberSecPro core modules and the specific training requirements in health. The training modules cover a range of cybersecurity themes, such as human factors of cybersecurity, data and privacy security and a host of other topics. With this training, healthcare professionals are empowered to deploy the necessary tools, technologies, and expertise to secure and protect patient data and preserve the system's integrity. Table 1 summarizes the training modules developed for health sector cybersecurity.

Table 1: Summary of CyberSecPro training modules for the health sector

S/N	Module Code	Module Title
1	CSP001_W_H	Cybersecurity Essentials and Management for Health Sector
2	CSP001_CS-E_H	RxB - Cyber security management game
3	CSP002_S_H	Cybersecurity and Health
4	CSP002_SA_H	Human Aspects of Healthcare Cybersecurity
5	CSP003_C_H	Cybersecurity Risk Management and Governance in the Healthcare sector
6	CSP004_C_H	Network Security for Health
7	CSP004_S_H	Cybersecurity - Endpoint protection in healthcare systems
8	CSP005_S_H	Data Protection and Privacy Technologies for Healthcare
9	CSP005_W_H	Data Protection and Privacy Technologies for Healthcare
10	CSP006_SA_H	Cyber Threat Intelligence for Healthcare
11	CSP006_S_H	Network and IoMT Security
12	CSP007_S_H	Practical Insights in Anomaly Detection
13	CSP007_SA_H	Cybersecurity in Emerging Technologies, in particular explainable AI for healthcare
14	CSP008_S_H	Cascading Effects in Complex Health Networks
15	CSP009_W_H	Securing Healthcare Web Applications
16	CSP0010_W_H	Penetration Testing for Healthcare IT Infrastructures
18	CSP0011_S_H	Cyber Ranges and Operations in healthcare domain
19	CSP0011_W_H	Detection Engineering on a Cyber Range of a Healthcare IT infrastructure-Active Directory
20	CSP0012_SA_H	Digital Forensics for Health Sector
21	CSP012_S_H	Digital Forensics for Health

In CyberSecPro, a training module could be a course (C), seminar (S), workshop (W), cybersecurity exercise (CE), summer school (SS), winter school (WS), and hackathon (H). These module types are indicated in the module code (see Table 1, column 2) generation, and the last letter (H) in the code represents health (i.e., health training module). Training modules in other sectors are similarly named. To ensure the quality of the training modules, trainers and trainees evaluate each implemented module, and the feedback generated from the evaluation is utilized to improve future implementations.

Creating an operational training plan (Koloudu et al., 2024) that encompasses mobilizing potential trainees and trainers to implement these CyberSecPro training modules successfully is important. The operational plan enabled the operationalization of the generic and sector-specific cybersecurity training modules, which provide basic and advanced competence levels. Currently, the implementation of the training modules is ongoing even as new modules are introduced.

6. Conclusions

The integration of cybersecurity in health tourism is crucial for ensuring the safety and privacy of patient data, which is increasingly vulnerable to cyberattacks. This paper has highlighted the importance of addressing cybersecurity within multidisciplinary higher education institutions (HEIs) curricula to prepare a skilled workforce capable of managing these challenges. Our findings indicate that the international transfer of patient data and the use of interconnected systems, such as Electronic Health Records (EHR) and the Internet of Medical Things (IoMT), bring significant benefits to health tourism but also present significant cybersecurity risks. These risks must be mitigated through robust security measures, including advanced encryption techniques, secure communication channels, and comprehensive cybersecurity policies.

The CyberSecPro project serves as a best practice model for developing and implementing cybersecurity training programs tailored to the needs of the healthcare sector, which can also be utilized in health tourism education. By aligning educational offerings with the European Cybersecurity Skills Framework (ECSF) and continuously updating training content to reflect emerging threats and technologies, HEIs can better equip their students with the necessary skills and knowledge. The effective integration of cybersecurity in health tourism education requires a collaborative approach between academia and industry. HEIs must transform their academic offerings to address the evolving cybersecurity landscape and invest in continuous professional development. By doing so, they can ensure that future healthcare professionals are well-prepared to protect patient data and maintain the integrity of health tourism services.

Acknowledgement

The authors would like to acknowledge the financial support provided by the following projects: CyberSecPro: Collaborative, Multi-modal, and Agile Professional Cybersecurity Training Program for a Skilled Workforce in the European Digital Single Market and Industries, which have received funding from the European Union's Digital Europe Programme (DEP) under grant agreements No. 101083594. The views expressed in this paper represent only the authors' views and not those of the European Commission or the partners in the CyberSecPro project. Finally, the authors declare that no conflicts of interest, including any financial or personal relationships, could be perceived as potential conflicts.

References

- Adeniyi, Adekunle Oyeyemi, et al. "The Impact of Electronic Health Records on Patient Care and Outcomes: A Comprehensive Review." *World Journal of Advanced Research and Reviews*, vol. 21, no. 2, Feb. 2024, pp. 1446–55, doi:10.30574/wjarr.2024.21.2.0592.
- Alcaraz, C. et al. (2024) "CyberSecPro Portfolio of Cybersecurity Curricula Targeted to Energy," 2023. [Online]. Available: <https://www.cybersecpro-project.eu/wp-content/uploads/2024/06/D3.4-V1.1-Re-submitted-.pdf>
- AMKIT. 2024. Theseus. Online: <https://www.amkit.fi/en/theseus-en/> Referred 25 Jan., 2025.
- Arenas-Reséndiz, Tanya, et al. "Methodology to Analyse Cybersecurity in Tourism." *Smart Tourism*, vol. 5, no. 1, Mar. 2024, pp. 2495–2495, doi:10.54517/st.v5i1.2495.
- Bradford, Laura, et al. "International Transfers of Health Data between the EU and USA: A Sector-Specific Approach for the USA to Ensure an 'Adequate' Level of Protection." *Journal of Law and the Biosciences*, vol. 7, no. 1, Jan. 2020, doi:10.1093/jlb/ljaa055.
- Briguest, "Cybersecurity Challenges in Tourism: Emerging Threats and Vulnerabilities," 13 August 2024. Available: <https://www.briguest.com/en/cybersecurity-challenges-tourism-emerging-threats-vulnerabilities/> Referred 25 Jan., 2025.

- Carrera, Percivil Melendez, and John F. P. Bridges. "Globalization and Healthcare: Understanding Health and Medical Tourism." *Expert Review of Pharmacoeconomics & Outcomes Research*, vol. 6, no. 4, Aug. 2006, pp. 447–54, doi:10.1586/14737167.6.4.447.
- Connell, John. "Contemporary Medical Tourism: Conceptualisation, Culture and Commodification." *Tourism Management*, vol. 34, June 2012, pp. 1–13, doi:10.1016/j.tourman.2012.05.009.
- Dini, Mauro, and Tonino Pencarelli. "Wellness Tourism and the Components of Its Offer System: A Holistic Perspective." *Tourism Review*, vol. 77, no. 2, July 2021, pp. 394–412, doi:10.1108/tr-08-2020-0373.
- Florida-Benítez, Lázaro. "The Cybersecurity Applied by Online Travel Agencies and Hotels to Protect Users' Private Data in Smart Cities." *Smart Cities*, vol. 7, no. 1, Feb. 2024, pp. 475–95, doi:10.3390/smartcities7010019.
- Global Wellness Institute, *Wellness Policy Toolkit: Wellness In Tourism*, 2024 <https://globalwellnessinstitute.org/industry-research/2024-wellness-policy-toolkit-wellness-in-tourism/>
- Hirsjärvi, S., Remes, P. and Sajavaara, P. *Tutki ja kirjoita, Keuruu: Otava*, 2007.
- Huang, Chenxi, et al. "Internet of Medical Things: A Systematic Review." *Neurocomputing*, vol. 557, Aug. 2023, pp. 126719–126719, doi:10.1016/j.neucom.2023.126719.
- Kaloudi, N. et al. (2024) "CyberSecPro Training Operational Plan," 2024. [Online]. Available: <https://www.cybersecpro-project.eu/wp-content/uploads/2024/05/D4.1-Training-Operational-Plan-v0.1.pdf>
- Kerlegis, D. et al. (2024) "CyberSecPro Portfolio of Cybersecurity Curricula Targeted to Maritime," 2023. [Online]. Available: <https://www.cybersecpro-project.eu/wp-content/uploads/2024/06/D3.5.-Submitted-2024-06-04.pdf>
- Koutras, D. et al. (2024) "CyberSecPro Portfolio of Cybersecurity Curricula Targeted to Health," 2023. [Online]. Available: https://www.cybersecpro-project.eu/wp-content/uploads/2024/06/D3.3-CyberSecPro_Health_v1.0_FINAL_submitted.pdf
- Lieberknecht, A. et al. (2024) "CyberSecPro Programme Specifications," 2023. [Online]. Available: <https://www.cybersecpro-project.eu/wp-content/uploads/2024/05/D2.3-CyberSecPro-Programme-Specifications-1.0.pdf>
- Lehto, T. (2021). *Terveysmatkailu Suomessa*. Thesis. Haaga-Helia University of applied Sciences.
- Lugo, R. et al. (2023) "Blended CyberSecPro technological training interactive technologies and academic practice," 2023. [Online]. Available: https://www.cybersecpro-project.eu/wp-content/uploads/2024/05/D2.2-Blended-CyberSecPro-technological-training-interactive-technologies-and-academic-practice-v1.0_Submitted.pdf
- Mathkor, Darin Mansor, et al. "Multirole of the Internet of Medical Things (IoMT) in Biomedical Systems for Managing Smart Healthcare Systems: An Overview of Current and Future Innovative Trends." *Journal of Infection and Public Health*, Jan. 2024, doi:10.1016/j.jiph.2024.01.013.
- Medical Tourism Association Finland, 2025 <https://medicaltourismfinland.com/>
- Mei, Anqi, et al. "Research on Information Security Protection in The Context of Post-Epidemic Tourism Revival." *International Journal of Education and Humanities*, vol. 12, no. 2, Feb. 2024, pp. 44–48, doi:10.54097/zwbmyt93.
- Pritika, Pritika, et al. "Risk Assessment of Heterogeneous IoMT Devices: A Review." *Technologies*, vol. 11, no. 1, Feb. 2023, pp. 31–31, doi:10.3390/technologies11010031.
- Quintela, Joana A., et al. "Health, Wellness and Medical Tourism - a Conceptual Approach." *ENLIGHTENING TOURISM A PATHMAKING JOURNAL*, vol. 6, no. 1, June 2016, pp. 1–18, doi:10.33776/et.v6i1.2814.
- Rathod, P. et al. (2023) "Cybersecurity practical skills gaps in Europe: Market demand and analysis," 2023. [Online]. Available: https://www.cybersecpro-project.eu/wp-content/uploads/2023/07/D2.1_Cybersecurity_Practical_Skills_Gaps_in_Europe_v1.0.pdf
- Rubí, Jesús N. S., and Paulo Roberto de Lira Gondim. "IoMT Platform for Pervasive Healthcare Data Aggregation, Processing, and Sharing Based on OneM2M and OpenEHR." *Sensors*, vol. 19, no. 19, Oct. 2019, pp. 4283–4283, doi:10.3390/s19194283.
- Selvakumar, Kumaravel, and S. Lokesh. "A Cryptographic Method to Have a Secure Communication of Health Care Digital Data into the Cloud." *Automatika*, vol. 65, no. 1, Jan. 2024, pp. 373–86, doi:10.1080/00051144.2023.2301240.
- Tourism Teacher, What is health tourism and why is it growing? <https://tourismteacher.com/health-tourism/> Last updated: 20/01/2023
- Whitlock, Jennifer. "Why Patients Are Turning to Medical Tourism" *Verywell Health*, August 11, 2022 <https://www.verywellhealth.com/understanding-medical-tourism-4069869>
- Zhong, Lina, et al. "Medical, Health and Wellness Tourism Research—A Review of the Literature (1970–2020) and Research Agenda." *International Journal of Environmental Research and Public Health*, vol. 18, no. 20, Oct. 2021, pp. 10875–10875, doi:10.3390/ijerph182010875.
- Yin, Robert. *Case study research: Design and methods* (Ed. 4), Thousand Oaks: Sage, 2009.

Butterfly Effect Shaping the Tourism Ecosystem: A Case Study of Border Security and Tourism from Strandzha Nature Park

Rositsa Röntynen and Snezhanka Ovcharova

Varna Free University Chernorizets Hrabar, Varna, Bulgaria

rositsa.rontynen@vfu.bg

ovcharova@vfu.bg

Abstract: This article examines a case from the largest protected area in Bulgaria – Strandzha Nature Park, located at both a national border and an external border of the European Union. Here, the acute, pressing needs of national security intersect with long-term nature- and culture-based tourism efforts. The tourism ecosystem, as a business ecosystem, is characterized by complexity. In such complex adaptive systems, the butterfly effect can be observed, where small contributions or changes in the initial conditions lead to dramatic consequences and often unpredictable results, affecting the overall health of the system. The research presents the impacts of a new business traveler segment – policemen and soldiers stationed in the region – on tourism in the municipality of Malko Tarnovo, which lies entirely within the park's boundaries. To assess these impacts, statistics, secondary analysis of expert interviews, and online communications were reviewed. The results reveal both positive and negative direct alterations in the accommodation supply which, in turn, could further influence many aspects of both consumer behavior and tourism service providers' decisions. The study suggests that the state, as the factual customer of business tourism services, should recognize its role within the ecosystem and contributes to the strategic development of tourism in the region, rather than unintentionally disrupting it. By examining a specific case in tourism practice, the study offers empirical validation of the ecosystemic governance framework in tourism. Furthermore, it contributes to tourism governing in other similar regions across Europe.

Keywords: Tourism ecosystem, Butterfly effect, National security, Strandzha Nature Park, Strategic development

1. Introduction

Tourism is a strategic sector for Bulgaria. It is considered as a business ecosystem, characterized by complexity. In such complex adaptive systems, the butterfly effect can be observed, where small contributions or changes in the initial conditions lead to dramatic consequences and often unpredictable results, affecting the overall health of the system. This article addresses a highly topical issue of intersection between tourism development and EU external border security. It examines a case from Strandzha Nature Park, the largest protected area in Bulgaria, located at both a national border and an external border of the European Union. The research question is asked: *How does the national security activity of stationing police and military staff on the border affect the tourism development of Municipality of Malko Tarnovo?* The research question is approached by literature on tourism destinations as ecosystems where butterfly effect can be observed, as well as historical and geographical overview of Strandzha Nature Park as a definitive factor of tourism for the region. Next, statistics, expert interviews, and media reports are investigated. The study suggests that the state, as a key customer of business tourism, should acknowledge its role in the ecosystem and support strategic tourism development in the region, rather than disrupt it. Findings contribute to sustainable tourism governing in other similar regions across Europe.

2. Literature Review

This study views the tourism destination as an ecosystem where the butterfly effect could be observed. The examined destination is the inland territory of Strandzha Nature Park situated in the Municipality of Malko Tarnovo – Bulgaria, on the border with Türkiye. Thus, the literature review covers the concept of butterfly effect as a characteristic of an ecosystem, as well as some aspects from the history and geography of Strandzha Nature Park, both from tourism and national security point of view.

2.1 The butterfly Effect in the Tourism Ecosystem

Tourism destination can be viewed as an ecosystem (Selen & Ogulin, 2015) where interconnected agents act in a network based not only on contractual but also non-contractual relationships (Hillebrand, 2022). These agents come from a wider pool than just the tourism industry and are not always destination-bound (Selen & Ogulin, 2015). They represent both the production and consumption side of tourism (Selen & Ogulin, 2015; March & Wilkinson, 2009).

The tourism destination as a business ecosystem is a complex adaptive system (Smith & Stacey, 1997). Its complexity is expressed in a set of characteristics, one of which is the so-called butterfly effect. An ecosystem and all its elements are interconnected and share a common faith, whereby the health of the entire system

improves when all its members are thriving, and conversely, the system becomes unsustainable if critical resources are damaged or out of alignment (Iansiti & Levien, 2004). The butterfly effect is a metaphor for how small, seemingly insignificant changes in the conditions can lead to vastly different outcomes in such complex systems, emphasizing how the interactions among components can produce unpredictable behaviour (Lewin, 1993). This concept highlights the importance of understanding the interconnectedness and non-linear relationships within complex systems, which can complicate predictions and decision-making processes. The butterfly effect can enhance the understanding of the broader implications of an agent's actions, regardless of their position within the ecosystem. In tourism, the awareness of these implications should be developed especially in terms of customers who are increasingly co-developing the experiences (Buonincontri et al, 2017; March & Wilkinson, 2009).

2.2 Strandzha Nature Park – Between Tourism and National Security Goals

Established in 1995, Strandzha Nature Park is the largest protected area in Bulgaria, and the only inhabited one (Georgiev, 2010). It incorporates the Municipality of Malko Tarnovo in its entirety and parts of the Municipality of Tsarevo, being situated in South-East Bulgaria, on the border with Türkiye. It is acknowledged as important and given priority at the national, regional, and European levels, based on different indicators related to biodiversity and landscapes (Chorbadzhiyska, 2012). Against the background of unique nature, monuments from the ancient Thracian civilization and the UNESCO-recognized indigenous custom of nestinarstvo have also been preserved (Assenova, 2012). Categorized as a nature park, category V by the International Union for Conservation of Nature (IUCN) criteria, Strandzha offers excellent tourism opportunities alongside biodiversity conservation and sustainable resource use (Georgiev & Stoilova, 2006). From a socio-economic perspective, the primary functions of the area are agriculture and recreation. Traditional livelihoods for the local population include forestry and sea fishing. A trend of depopulation is evident due to the area's border location and rural characteristics. (Georgiev, 2010.)

Despite the lack of sanctioned management plan (Ivanova, 2024), the park is operating, and efforts are made to develop tourism, especially as a means of socio-economic revival of the region (Municipality of Malko Tarnovo, 2019). Marine and recreational mass tourism are prevalent in the park's coastal regions belonging to Tsarevo, whereas alternative nature-based and rural tourism are being developed in the interior areas, mainly within the Municipality of Malko Tarnovo. (Georgiev, 2010.) Recently, the idea for health tourism development and the revival of climate treatments utilizing the clean air in the park have emerged (Bulgarian News Agency, 2021).

The southern border of the nature park coincides with big part of the Bulgarian national border with Türkiye (see Figure 1), which is also an external border of the European Union (EU) (Penin, 2007, 19). From a total of 259 km common border between the two countries (Penin, 2007, 19), 141 km or 54 % fall under the jurisdiction of the Border Police Department of Malko Tarnovo. Also, one of three border crossing points with Türkiye is in the municipality of Malko Tarnovo. (Ministry of the Interior – Main Directorate Border Police, 2021.) These facts define the important role of Strandzha region in ensuring the national security by resisting the migration pressure from the Middle East and Northern Africa, which has intensified ever since the outbreak of the Arab spring in 2010-2012 (Tashev, 2018). Bulgaria is facing the responsibilities and burdens of protecting not only its national but also EU's external border (Tashev, 2018, 13), being part of the The Eastern Mediterranean migration route (Tashev, 2018, 85), although the country is subject to much smaller migration pressure than Greece, Italy, and the countries of the Western Balkans (Dimitrov, 2018a). In addition, Bulgaria fulfills its commitments as a candidate for full Schengen membership (Ministry of the Interior, n.d., 21). Due to the security situation, in the last 10 years a border fence facility has been built and police and military staff has been continuously deployed to the border region from different parts of the country (Dimitrov, 2018b) on duty trips with limited duration, up to 30 days (Labor Code, 2024, art. 121; BNR, 2024), but the practice of deployment could continue indefinitely depending on the border situation (Hristov, 2015). According to current assessments, as a result of globalization, demographic processes, climate changes, the aggravation of inter-ethnic and inter-religious relations, there is a tendency towards the continuation of the migration process in the long term (Ministry of the Interior, n.d., 40).

The logistics provision of Bulgaria concerning migration has been researched only from the perspective of the refuge and accommodation services provided to migrants (e.g., Danev, 2022) but not from the point of view of the services needed by the stationed border patrol personnel. Currently, the Bulgarian state does not own accommodation facilities in the proximity to the Turkish border. All the facilities, including military units, border posts, barracks, storages, residential apartments, recreational facilities, kitchens, infirmaries, even

theaters, once serving the former Border Troops, have first been abandoned for more than 10 years (Slavcheva, 2010; Burgas24.bg, 2009; Katsarska, 2015), and later sold by the Ministry of Defense and the Ministry of the Interior as non-necessary (Meduzata, 2016; BNR, 2022) to the municipalities and to private entities (Meduzata, 2016; BNR, 2022). Part of them is repurposed, e.g., a livestock farm was built in the smaller military unit of Zvesdets (Slavcheva, 2010). Despite their potential for tourism (Slavcheva, 2010, Burgas24.bg, 2009), they are mainly left to decay (Kolev, 2017; Katsarska, 2015). Meanwhile, the stationed personnel are “accommodated in hotels, and where such are not available - in tourist facilities registered and categorized by the relevant municipality under the Tourism Act (private accommodation, guest houses, etc.)” (Ureport, 2015).

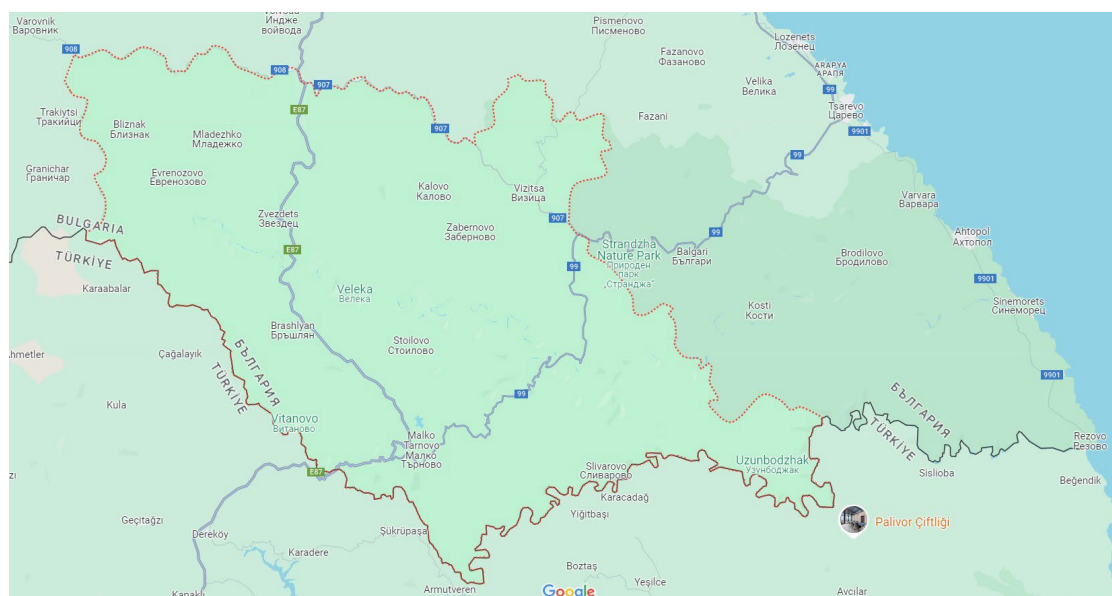


Figure 1: The border of Strandzha Nature Park with Türkiye, coinciding with the Bulgarian national border. The limits of the Municipality of Malko Tarnovo are visible but all the 141 km of border concerning the park fall under the jurisdiction of the Border Police Department of Malko Tarnovo. Map source: Google Maps

3. Methodology

The need for the current research emerged during a round of expert interviews for a larger study concerning the development of health and recreation tourism in Strandzha Nature Park, conducted in June 2024. Thus, empirical data has not been designed and collected for this study in particular, but rather the relevant expert interviews, five in total, have been utilized secondarily, while enriching the data with statistics, media pieces, and state documents. The interviewees, representing both the public and private side of tourism in the destination, are anonymized. All interviews are conducted in Bulgarian, and the used citations are authors’ translations into English.

The statistics on the development of accommodation capacity and tourist visits were obtained partially from the Municipality of Malko Tarnovo, and wherever the need extended the availability, also as a paid, tailored service provided by the National Statistical Institute of Bulgaria, as well as from the National Tourism Registry (n.d.). The electronically stored statistical data covers the period 2019-2024 since the establishment of the digital National Tourism Registry and the Unified Tourist Information System in Bulgaria, whereby every accommodation provider got the obligation to categorize their facility and report on its activity (Council of Ministers Decree No. 252, 2019, art. 2; Ministry of Tourism, n.d.). Earlier data was obtained from municipality reports (Municipality of Malko Tarnovo, 2014, 2019), but at that time, only small part of the accommodation sites has been registered.

Furthermore, documentation was sought to describe the processes of migration pressure and national security measures on the Türkiye border. Relevant documents of the state administration, such as orders, instructions, regulations, strategies, and plans were hard to obtain digitally or completely unavailable publicly, and their accessibility was complicated also by the fact that they concern several different institutions: the Ministry of Defense (MD), the Ministry of the Interior (MI), the multiplicity of regional directorates of the Ministry of the Interior (RDMI), the Main Directorate of Border Police (MDBP). To cover for this deficiency, the study also

utilized media reports from the period 2015-2024, starting from the first significant wave of migration pressure towards the Bulgarian border with Türkiye. The abundance of media pieces enabled the successful data triangulation, so the obtained data is relatively reliable. However, they are not systematic, and they are informing on the phenomenon unevenly. Still, some conclusions could be made based on the overall picture they paint. Altogether 25 reports of news were utilized.

4. Results

The study follows the development of migration pressure on the Türkiye border, causing the stationing of military and police personnel on the border and the development of accommodation supply in the Municipality of Malko Tarnovo.

4.1 Migration Pressure and Personnel Stationing 2010-2024

In Figure 2, a timeline is built regarding the migration pressure on the Turkish border and the response of the state by positioning military and police personnel from the interior of the country on the border. The numbers are not specific to the Municipality of Malko Tarnovo or Strandzha Nature Park, as such specific information is not publicly available, but by assumptions based on the portion of the border under the respective jurisdiction, at least 50% of the presented amounts of stationed personnel should concern the investigated area. Little information has been presented in the media on the number of policemen, focusing on the role of soldiers, which makes it difficult to calculate the total of stationed personnel. Different subdivisions under both the Ministry of Defense and the Ministry of the Interior have been engaged, but some presence on the border is provided at all times. In any case, these facts indicate hundreds to thousands of people visiting the region, who are practically business travelers. The security situation on the border does not seem to improve over time, so more similar measures of withstanding the migration pressure are expected in future.

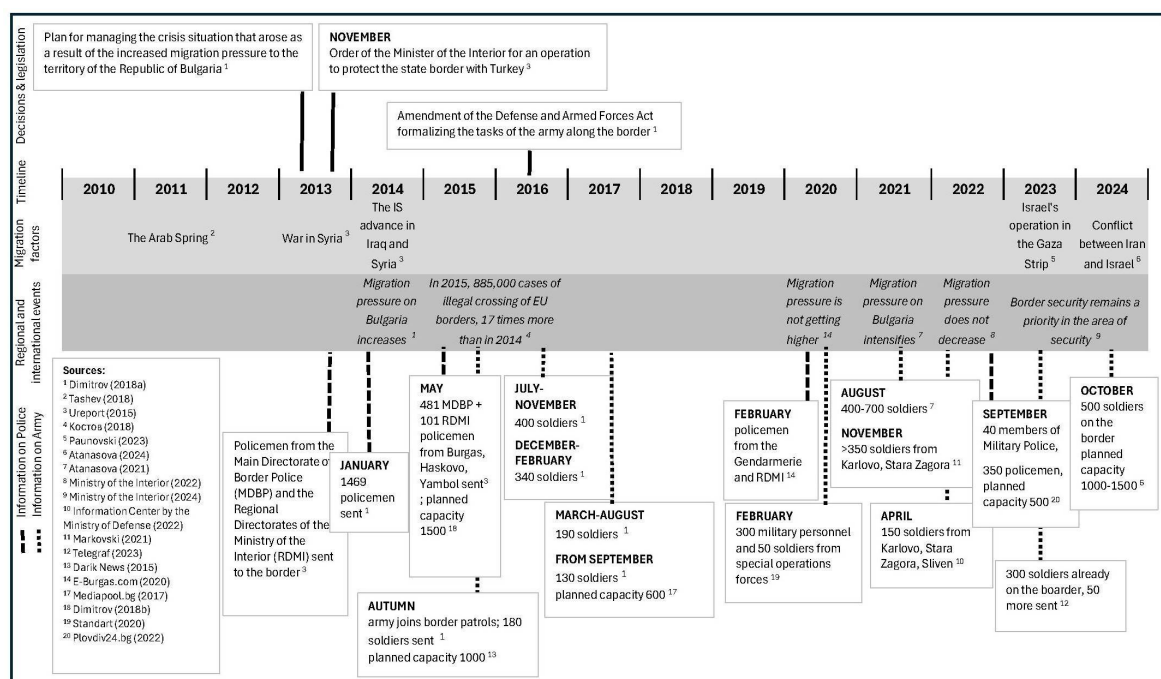


Figure 2: Timeline of the military and police deployments to the Türkiye border according to the investigated media pieces. Figure: Authors' own

When examining the places mentioned in media pieces where the soldiers and policemen are sent from (Figure 3), the closest is Burgas, situated on 74 km distance from the municipal center Malko Tarnovo, and the farthest is Karlovo, on 318 km. The average distance of the sending places to Malko Tarnovo is 203 km. As the number of sent personnel from each place is not known, is not possible to investigate the distances more accurately, e.g. using central tendencies. Moreover, there might be more sending places which have not been announced. None of the known distances, however, imply the possibility of daily commuting between the sending place and the border stationing, especially as it is also known that the working regime of the Border Police Department in Malko Tarnovo is 12-hour shifts (National Assembly of the Republic of Bulgaria, 2015). Consequently, accommodation is needed closer to the stationing – in Strandzha.

The existing research and examined media pieces also address the expenses related to the border personnel stationing. The posting of personnel on the border is among the biggest expenses together with the building of the border fence (Dimitrov, 2018a, 264). In the beginning, their duty trip expenses are covered by the state budget, but since 2017, they are mostly covered by EU's migrant crisis aid (Dimitrov, 2018a, 269; Tsvetanova, 2022; Ministry of the Interior, n.d., 49). The accommodation expenses per person are 40 BGN (approx. 20 €) per night (Radio999bg, n.d.; Fakti.bg, 2019), which makes 1200 BGN (approx. 600 €) per 30 days. The overnight stays are paid directly to the accommodators (Ureport, 2015).

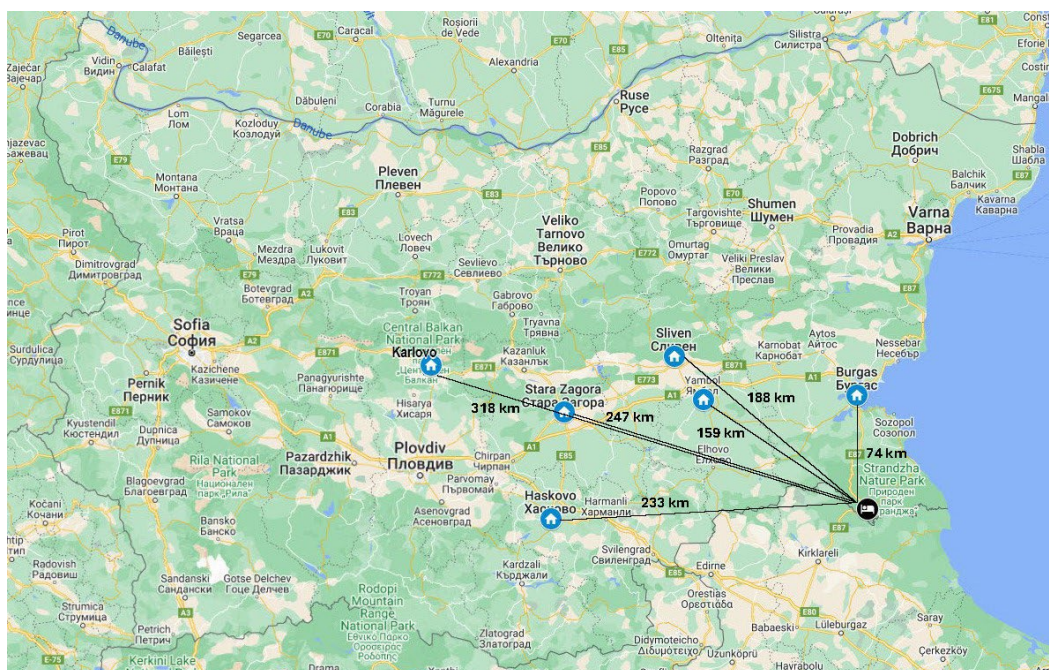


Figure 3: Map of Bulgaria with distances between the sending workplaces and the stationing (Malko Tarnovo) of military and police staff. Map by Google Maps; data by Ureport (2015), Information Center by the Ministry of Defence (2022), Markovski (2021); figure: Authors' own

4.2 Accommodation in the Municipality of Malko Tarnovo 2014-2024

4.2.1 According to statistics

In the last ten years, the accommodation capacity in the Municipality of Malko Tarnovo has grown dramatically (Figure 4). For the first five years of the period, the growth in number of accommodation sites is almost 47% with nearly 54% increase in the number of beds. Encouraged by the demand for accommodation of military and police staff, new property owners and existing accommodators from the grey area have entered the categorization. The second half of the period saw nearly doubled growth compared to the first one. A significant factor in this phenomenon after 2019 is the newly established digital National Tourism Registry.

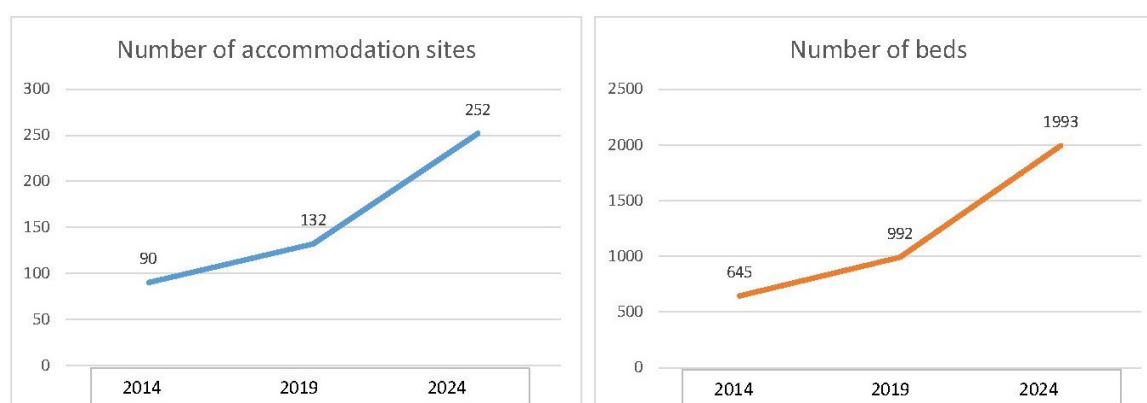


Figure 4: Development of accommodation capacity in the Municipality of Malko Tarnovo 2014-2024. Data: Municipality of Malko Tarnovo (2014,2019), National Tourism Registry (n.d.); figure: Authors' own

The most substantial pressure of accommodating border's business travelers is evidently put on the town on Malko Tarnovo. In none of the surrounding villages the difference is so pronounced between Bulgarian male visitors of working age compared to female visitors (Table 1). Males mainly aged 20-44, but also younger and older within the working age, fit to the profile of border guards.

The average revenue from an overnight stay within the municipality, calculated using the number of realized overnight stays and the total annual revenue of overnight stays, is nearing the price paid for accommodation by the state, namely 40 BGN which is also evidence of how the new customer segment is dominating the market (Table 2).

Table 1: Persons stayed overnight in the town of Malko Tarnovo until 9.8.2024 by gender, age, and origin.
Data: statistics of the Municipality of Malko Tarnovo; table: Authors' own

2024 (1.1. - 9.8.)		Number of persons stayed overnight			
		Bulgarian citizens		Foreigners	
Malko Tarnovo		Men	Women	Men	Women
Total:		2509	304	27	11
Age group	15-29	307	32	2	1
	30-44	1346	109	15	3
	45-59	803	132	6	4
	60+	48	28	4	3

Table 2: Average revenue from an overnight stay in Municipality of Malko Tarnovo. Only accommodation sites with 10 beds or more. Data: National Statistical Institute; table: Authors' own

Average revenue from an overnight stay (BGN)			
Year	Total	Bulgarians	Foreigners
2019	39,35	39,62	35,07
2020	42,65	n/a	n/a
2021	36,50	36,39	41,33
2022	43,95	43,81	53,31
2023	65,21	n/a	n/a

4.2.2 According to tourism actors in Malko Tarnovo

Those engaged in tourism activity in Malko Tarnovo recognize the border deployments as a factor in local tourism. It directly affects the accommodation supply: "It is a fact that most of the guest apartments and rooms exist because of the border guards" (Expert 2). On the one hand, this additional tourist flow brings additional income to locals and evens out the seasonal drops of demand: "Accommodators cannot count only on weekends to survive" (Expert 2). On the other hand, with this arrangement there is no capacity left to accommodate the traditional leisure and recreational tourists, especially the groups (Experts 1,2). "All the bases are occupied by the military, commanded from the interior of the country, year-round" (Expert 1).

Those, who have worked longer for developing the local tourism, see the shift in tourist segments being served as unfulfilled potential regarding the strategic goals: "We cannot benefit from Strandzha's natural resources" (Expert 1); "The focus of Strandzha is in the silence, the calm, the green, the forest, the return to one's own nature. [...] What little tourism we have going on, we have built up over many years, based on nature and culture, and now it is being hindered" (Expert 3). But for others, it makes sense economically, because each stationed soldier or policeman is a long-stay, more sustainable customer: "Many owners refuse to accommodate for just one night. To clean the whole house every day is not cost-effective. There is no laundry service in the area" (Expert 2). Still, there are some entrepreneurs who do not want to handle the bureaucracy with the state and prefer the conventional leisure tourist as a customer (Expert 4).

The role of the state as an end customer in this case is central. It has driven the officializing of accommodation activity in a culture where grey economy is a widely accepted practice: "It is illegal to accommodate if the place is not registered and categorized. Accommodation places register and pay taxes because border guards need invoices. [...] The current statistics are, however, not completely accurate. Those, who do not accommodate border guards, do not issue invoices, nor pay taxes" (Expert 2). However, this is not the only

factor determining whether the site will be registered: “Overnight stays are registered online. Granny Siyka cannot manage, so most of the elderly women in the village quit tourism” (Expert 5).

Others see the phenomenon of border deployments within the bigger picture of poorly synchronized actions between the various institutions of the Bulgarian state: “The state needs to set its priorities” (Expert 3), “I do not need the state to help me anyhow in my business, I only require it not to get in my way” (Expert 4).

The military and police are not only customers of tourism. They are also visible while on duty. In a region known for the illegal migration pressure, their presence “instills security in tourists” (Expert 4).

5. Conclusions and Discussion

5.1 Conclusions

The results reveal both positive and negative direct alterations in the accommodation supply. Among the positive impacts are the increased revenue of accommodation services for locals, the less seasonal nature of visits, the diversification of visitor segments, and the incentives for accommodation businesses to leave the gray economy. Also, the professional presence of border guards, regardless of their tourist role, adds up to the perceived feeling of safety for other tourists.

A significant negative impact is the non-strategic nature of this new business travel activity: it is not part of the local tourism development efforts, but the decision and the operation model are dictated by state structures outside of the destination without consideration for tourism. Another negative impact is that many accommodation providers get used to and dependent on the new arrangement and start choosing their clients, preferring long-stay police and military customers over the nature and culture explorers. On the one hand, the municipality, the nature park directorate, and many service providers participating in the destination ecosystem market the destination through a tourism offer which is highly inaccessible because of the lack of accommodation for leisure visitors, which could confuse the potential consumers. In long term, nature and culture visitors could be discouraged from visiting the region at all, leaving service providers even more depending on border guard activities, which could seize with a single order by a state bureaucrat. A serious consideration should be given to the fact that tourism is much more than accommodation services, and border’s business travelers do not need guided excursions, transportation, events, etc. The new value created by them destroys the value built for tourism actors around leisure and recreation tourism. Hopes for health and climatic healing tourism might never get realized, as they require longer stays but accommodation is blocked. These described impacts are mostly direct or logically trackable. However, the real nature of the butterfly effect is in the long-term unpredictability of impacts (Smith & Stacey, 1997, 82), meaning that if left without strategic planning and governance, Malko Tarnovo’s and Strandzha Nature Park’s tourism could take any direction, and the destination ecosystem may cease to exist. Therefore, the study suggests that the state, as the factual customer of business tourism services, should recognize its role within the ecosystem and contribute to the strategic development of tourism in the region, rather than unintentionally disrupting it.

5.2 Limitations

The limitations of this study are in the fragmented and secondary nature of data utilized, as the border guards are not directly distinguishable in statistical data, and not all documents regarding their stationing are publicly accessible.

5.3 Implications and Further Research

By examining a specific case in tourism practice, this study provides empirical validation of the ecosystemic governance framework in tourism, contributing to the limited literature on the subject. Additionally, it holds relevance for managing tourism in similar regions across Europe, where EU external border security intersects with tourism—a highly topical issue.

Further research, particularly by governmental bodies, is recommended to systematically study and monitor this phenomenon. A follow-up study could also be conducted at a later stage to assess the long-term impacts from a fresh time perspective.

Acknowledgements

We would like to express our sincere gratitude to the Municipality of Malko Tarnovo for their invaluable support throughout the development of this study. Their provision of statistical data and other resources has

been instrumental in shaping the research and ensuring its success. This study would not have been possible without their generous contributions.

References

- Assenova, M. (2012). Problems of Sustainable Tourism Development in Strandzha Nature Park. *Journal of Environmental and Tourism Analyses*, 1(1), 43-63.
- Atanasova, M. (2021). The Minister of Defense: We are deploying military personnel to the border; the pressure is increasing [Министърът на отбраната: Командиrowame военни на границата, натискът се увеличава]. <https://fakti.bg/bulgaria/607992-ministar-at-na-otbranata-komandirovame-voenni-na-granicata-natiskat-se-velichava>
- Atanasova, M. (2024). Minister Zapryanov: We are strengthening the security of strategic facilities in the country [Министър Запрянoв: Засилваме охраната на стратегически обекти в страната]. <https://fakti.bg/bulgaria/917190-ministar-zapryanov-zasilvame-ohranata-na-strategicheski-obekti-v-stranata>
- BNR (2022). 15 military apartments in Zvezdets are transferred to Malko Tarnovo Municipality [15 военни апартаменти в Звездец преминават към Община МалкоТърново]. <https://bnr.bg/burgas/post/101631571/15-voenni-apartamenta-v-zvezdec-preminavat-kam-obshtina-malko-tarnovo>
- BNR (2024). A deputy from "Vazrazhdane" asks about the posting of border police officers [Депутат от "Възраждане" пита за командироването на гранични полицаи]. <https://bnr.bg/burgas/post/101972444/boris-aladjov-sas-zapitvane-za-komandirovki-na-granichni-polica-i>
- Bulgarian News Agency (2021). An initiative committee has proposed that climate treatment be established as a form of health and medical tourism in the Strandzha region [Климатолечението да залегне като форма на здравен и медицински туризъм в района на Странджа, са предложили от инициативен комитет]. <https://www.bta.bg/bg/news/21780-Klimatolechenieto-da-zalagne-kato-forma-na-zdraven-i-meditinski-turizam-v-rayon>
- Buonincontri, P., Morvillo, A., Okumus, F. & Van Niekerk, M. (2017). Managing the experience co-creation process in tourism destinations: Empirical findings from Naples. *Tourism Management*, 62, 264-277. <https://doi.org/10.1016/j.tourman.2017.04.014>
- Burgas24.bg (2009). The Municipality of Malko Tarnovo wants to turn the border points into visitor centers [Община Малко Търново иска да превърне заставите в посетителски центрове]. <https://www.burgas24.bg/novini/regionalni/Obshtina-Malko-Turnovo-iska-da-prevurne-zastavite-v-posetitel-ski-centro-ve-116512>
- Chorbadzhiyska, E. (2012). Assessment of landscapes with co-conservation significance in the Nature Park "Strandja" [Оценка на ландшафтите с косервационна значимост в ПП "Странджа"]. *Problems of Geography*, 3-4, 111-125.
- Council of Ministers Decree No. 252. (2019, October 15). Regulation on the National Tourist Register and the Conditions and Procedures for Inclusion in the National Register of Tourist Attractions, Festivals, and Events (Title amended - SG, Issue 12 of 2021). Promulgated in State Gazette, Issue 81 of October 15, 2019, amended and supplemented in State Gazette, Issue 12 of February 12, 2021.
- Danev, I. (2022). Improving Logistics Provision in the Conditions of Refugee Crisis on the Territory of the Republic of Bulgaria. Dissertation abstract. Vasil Levski National Military University.
- Darik News. (2015). We will deploy up to 1000 military personnel at the border with Turkey in the coming days [Разполагаме до 1000 военни по границата с Турция в следващите дни]. <https://dariknews.bg/novini/bylgariia/razpolagame-do-1000-voenni-po-granicata-s-turciq-v-sledvashtite-dni-1500693>
- Dimitrov, P. (2018a). Between "Go Back Turkey" and Brussels: Bulgaria and the migration wave (2013-2017) [Между "гоу бек Търки" и Брюксел: България и мигрантската вълна (2013-2017)]. In Kostov, A., Ognyanova, I. & Banchev, B. (Eds.). *The refugee crisis and the Balkans (2015-2016) [Бежанската криза и Балканите (2015 – 2016)]*, 261-284.
- Dimitrov, P. (2018b). Between realism and Brussels: The migration problem in Bulgaria during 2013-2017 [Между реализма и Брюксел: миграционният проблем в България през 2013-2017]. *Geopolitica*, (5). <https://geopolitica.eu/2018/171-broy-5-2018/2902-mezhdu-realizma-i-bryuksel-migratsionniyat-problem-v-balgariya-prez-2013-2017>
- E-Burgas.com. (2020). Border police: There is no refugee pressure towards Bulgaria [Гранична полиция: Няма бежански натиск към България]. <https://e-burgas.com/post/granichna-policiya-nyama-bejanski-natisk-kam-balgariya-9844>
- Fakti.bg (2019). [The stationed policemen in Plovdiv sleep in the hotel of the mayor's mother]. <https://fakti.bg/bulgaria/355469-komandirovanite-polica-i-v-plovdiv-spat-v-hotela-na-maikata-na-kmeta>
- Georgiev, G. (2010). *Nature under protection: National and nature parks and reserves in Bulgaria [Природа под закрила: Националните и природните паркове и резерватите в България]*. Gea Libris.
- Georgiev, G. & Stoilova, D. (2006). Protected territories in Bulgaria and development of tourism. *Economics and Management*, 2(2), 33-43.
- Hillebrand, B. (2022). An ecosystem perspective on tourism: The implications for tourism organizations. *International Journal of Tourism Research*, 24(4), 517-524. <https://doi.org/10.1002/itr.2518>
- Hristov, Y. (2015). 400,000 BGN per month will cost the army at the border [400 хил. лв. на месец ще струва армията на границата]. <https://offnews.bg/razsledvane/400-hil-lv-na-mesetc-shte-struva-armiata-na-granicitata-465686.html>

- Iansiti, M. & Levien, R. (2004). *The Keystone Advantage: What the New Dynamics of Business Ecosystem Mean for Strategy, Innovation, and Sustainability*. Harvard Business School Press.
- Information Center by the Ministry of Defense (2022). Military personnel assist the Ministry of Internal Affairs in guarding the border [Военнослужещи подпомагат МВР в охраната на границата]. <https://armymedia.bg/2022/04/21/%d0%b2%d0%be%d0%b5%d0%bd%d0%bd%d0%be%d1%81%d0%bb%d1%83%d0%b6%d0%b5%d1%89%d0%b8-%d0%bf%d0%be%d0%b4%d0%bf%d0%be%d0%bc%d0%b0%d0%b3%d0%b0%d1%82-%d0%bc%d0%b2%d1%80-%d0%b2-%d0%be%d1%85%d1%80%d0%b0%d0%bd/>
- Ivanova, T. (2024, January 24). "Strandja" Nature Park is awaiting an update of the Management Plan [Природен парк „Странджа“ чака актуализация на Плана за управление]. <https://bnr.bg/starazagora/post/101939523/priroden-park-strandja-chaka-aktualizacia-na-plana-za-upravlenie>
- Katsarska, D. (2015). The Bulgarian-Turkish border and the forgotten southern outskirts [Българо-турската граница и забравените южни покрайнини]. https://pan.bg/view_article-59-27290-bylgaro-turskata-granica-i-zabravenite-iuzhni-pokrajnini.html
- Kolev, I. (2017). The Roma people are being evicted from the military properties in the village of Zvezdets, they are asking for a postponement [Вадят ромите от военните имоти в с. Звездец, те молят за отсрочка]. <https://www.flagman.bg/article/145697>
- Kostov, A. Migrations: Global and regional dimensions [Миграциите - глобални и регионални измерения]. In Kostov, A., Ognyanova, I. & Banchiev, B. (Eds.). *The refugee crisis and the Balkans (2015-2016)* [Бежанската криза и Балканите (2015 – 2016)], 9-32.
- Labour Code (2024). State Gazette, issue 70 of August 20, 2024.
- Lewin, R. (1993). *Complexity: Life at the edge of chaos*. Collier Books, New York.
- March, R. & Wilkinson, I. (2009). Conceptual tools for evaluating tourism partnerships. *Tourism Management*, 30, 455-462. <https://doi.org/10.1016/j.tourman.2008.09.001>
- Markovski, A. (2021). Over 350 military personnel have been deployed to the border [Над 350 военни са командировани на границата]. <https://offnews.bg/obshtestvo/nad-350-voenni-sa-komandirovani-na-granitsata-764101.html>
- Mediapool.bg. (2017). Karakachanov: We are sending 600 military personnel and special forces to the Turkish border [Каракачанов: Працаме на турската граница 600 военни и спецчасти]. <https://www.mediapool.bg/karakachanov-prashtame-na-turskata-granitsa-600-voenni-i-spetschasti-news268099.html>
- Meduzata (2016). The military sells departmental apartments by the kilo [Военните продават ведомствени апартаменти на килограм]. <https://meduzata.com/imoti/15854-voennite-prodavat-vedomstveni-apartamenti-na-kilogram>
- Ministry of the Interior – Main Directorate Border Police (2021). Regional Directorate "Border Police" – Elhovo [Регионална дирекция "Гранична полиция" – Елхово]. <https://www.mvr.bg/gdgp/%D0%B4%D0%B8%D1%80%D0%B5%D0%BA%D1%86%D0%B8%D1%8F%D1%82%D0%B0/%D1%80%D1%8A%D0%BA%D0%BE%D0%B2%D0%BE%D0%B4%D1%81%D1%82%D0%B2%D0%BE/%D1%80%D0%B5%D0%B3%D0%B8%D0%BE%D0%BD%D0%B0%D0%BB%D0%BD%D0%B0-%D0%B4%D0%B8%D1%80%D0%B5%D0%BA%D1%86%D0%B8%D1%8F-%D0%B3%D1%80%D0%B0%D0%BD%D0%B8%D1%87%D0%BD%D0%B0-%D0%BF%D0%BE%D0%BB%D0%B8%D1%86%D0%B8%D1%8F---%D0%B5%D0%BB%D1%85%D0%BE%D0%B2%D0%BE>
- Ministry of the Interior (2022). *Report on the implementation of the program budget of the Ministry of Internal Affairs for the first six months of 2022* [Отчет за изпълнението на програмния бюджет на Министерството на вътрешните работи към първото шестмесечие на 2022 г.].
- Ministry of the Interior (2024). *Report on the implementation of the program budget of the Ministry of Internal Affairs for the first six months of 2024* [Отчет за изпълнението на програмния бюджет на Министерството на вътрешните работи към първото шестмесечие на 2024 г.].
- Ministry of the Interior (n.d.). National Migration Strategy of the Republic of Bulgaria 2021-2025.
- Ministry of Tourism. (n.d.). Unified system for tourist information [Единна система за туристическа информация]. <https://www.tourism.government.bg/bg/kategorii/edinna-sistema-za-turisticheska-informaciya>
- Municipality of Malko Tarnovo (2014). Mayor's report for 2014. https://www.malkotarnovo.org/wp-content/uploads/2024/03/ot4et_kmet-2014.pdf
- Municipality of Malko Tarnovo (2019). Mayor's report for the term 2015-2019. <https://www.malkotarnovo.org/wp-content/uploads/2024/03/otchetskmet2015-2019.pdf>
- National Assembly of the Republic of Bulgaria. (2015, May 8). *Parliamentary oversight, Sixty-ninth session*. <https://parliament.bg/en/plenaryst/ns/51/ID/5379>
- National Tourism Registry (n.d.). <https://ntr.tourism.government.bg/CategorizationAll.nsf/mn.xsp>
- Paunovski, G. (2023). Additional military personnel have been sent to the border with Turkey [На границата с Турция са изпратени допълнителен брой военни]. https://m.dnevnik.bg/bulgaria/2023/10/14/4539719_na_granicata_s_turciia_sa_izprateni_dopolnitelen_broi/
- Penin, R. (2007). *Physical geography of Bulgaria* [Природна география на България]. Bulvest 2000.
- Plovdiv24.bg (2022). Dimitar Stoyanov: 40 officers of the "Military Police" will be posted to the border with Turkey [Димитър Стоянов: 40 служители на "Военна полиция" ще бъдат командировани на границата с Турция]. <https://www.plovdiv24.bg/novini/Bulgaria/Dimitur-Stoyanov-40-sluzhiteli-na-Voenna-policiya-shte-budat-komandirovani-na-granitsata-s-Turciya-1381507>

- Radio999bg (n.d.). 40 BGN per day - travel expenses of the policemen guarding the border [40 лв. на ден - командировъчните на полицаите, пазещи границата]. <https://radio999bg.com/bulgariya/40-lv-den-komandirovychnite-politsaite-pazeshti-granitsata>
- Selen, W. & Ogulin, R. (2015). Strategic Alignment across a Tourism Business Ecosystem. *Athens Journal of Tourism*, 2(3), 167-178. <https://doi.org/10.30958/ajt.2-3-3>
- Slavcheva, D. (2010). The regiment near the border [Полкът край границата]. <https://www.desant.net/show-news/21134>
- Smith, M.Y. & Stacey, R. (1997). Governance and cooperative networks: An adaptive systems perspective. *Technological Forecasting and Social Science*, 54(1), 79-94. [https://doi.org/10.1016/S0040-1625\(96\)00100-X](https://doi.org/10.1016/S0040-1625(96)00100-X)
- Standart (2020). 300 military personnel and 50 special forces are guarding the border [300 военни и 50 от спецчастите пазят границата]. <https://www.standartnews.com/bulgariya-obshtestvo/300-voenni-i-50-ot-spetschastite-pazyat-granitsata-416188.html>
- Tashev, S. (2018). *Migration Pressure on Bulgaria 2008–2017: Manifestation and Consequences*.
- Telegraph. (2023). Strengthening control at border checkpoints in our country [Засилват контрола по граничните пунктове у нас]. <https://telegraph.bg/bulgaria/novini/zasilvat-kontrola-po-granichnite-punktove-u-nas.-oshte-50-voenni-shte-pomagat-s-migrantskii-natisk-na-kapitan-andreevo-392607>
- Tsvetanova, K. (2022). Over 1.7 million paid the Ministry of the Interior for border guarding missions [Над 1,7 млн. платило МВР за командировки за охрана на границата]. <https://www.dnes.bg/politika/2022/06/08/nad-1-7-mln-platilo-mvr-za-komandirovki-za-ohrana-na-granicata.532709>
- Ureport. (2015). 582 police officers guard the border with Turkey [582-ма полицаи охраняват границата с Турция]. <https://ureport.bg/73754/2015/05/22/politika/bulgaria/582-ma-politsai-komandirovani-na-granitsata-s-turtsiya>

The Profile of the Finnish Rural Tourism Developer: An Unexplored Realm

Rositsa Röntynen

Jamk University of Applied Sciences, Jyväskylä, Finland

rositsa.rontynen@jamk.fi

Abstract: Rural tourism plays a pivotal role in fostering regional development and sustaining the livelihood of rural areas. It is a sector shaped by both internal and external influences due to its economic, cultural, and social significance. However, the individuals responsible for developing rural tourism, who serve as key resources and facilitators of other resources, remain underexplored. This paper seeks to fill that gap by constructing a profile of the Finnish rural tourism developer. By utilizing a resource-based approach within the context of rural tourism, the study underscores the importance of these developers not only as drivers of tourism but as central figures in the efficient use of regional resources. The research investigates several critical aspects: the nature of rural tourism developers' work, their competence needs, accessible funding tools, and the topics they consider important, promising, or challenging. To address these questions, empirical data was employed, drawn from a secondary analysis of a nation-wide questionnaire distributed to developers. Additionally, qualitative insights were gathered from four regional workshops held with developers across Finland. This mixed-methods approach allows for a comprehensive understanding of the developers' profile and their operational environments. Conducted as part of the Rural Finland Tourism Hub, a national development project funded by the European Agricultural Fund for Rural Development, this study has significant implications for the future of rural tourism. The findings suggest that rural tourism development efforts should not only rely on the capabilities of these developers but also actively support their professional growth and operational environments. By highlighting the crucial role that developers play in rural tourism, the study calls for targeted strategies to enhance their competencies and to foster a more supportive environment for their work. This paper contributes to the academic discourse on rural tourism and offers practical insights for policymakers and stakeholders invested in the sustainable development of rural areas.

Keywords: Rural tourism, Resource-based view, Tourism developer, Regional development, Finnish countryside

1. Introduction

Rural tourism (RT) plays a pivotal role in fostering regional development and sustaining the livelihood of rural areas. It is a sector shaped by both internal and external influences due to its economic, cultural, and social significance. However, the individuals responsible for developing RT, who serve as key resources and facilitators of other resources, remain underexplored. This paper seeks to fill that gap by constructing a profile of the Finnish RT developer. It utilizes the context of RT and a resource-based approach.

In the literature review, the research gap regarding RT developers is approached by seeking indirect references for the relevant roles and characteristics. Next, the resource-based approach is used to envision RT developers both as resources and utilizers of resources. Although the notion of competitive advantage is related to the resource-based approach, in this study, the competitors within a destination or the competition between rural destinations within Finland are disregarded. Instead, Finland's RT is treated as a holistic destination and RT developers are envisioned as a network of people engaged in development, coordination, and innovation activity, and representing different types of organizations.

The mixed-method study employed secondary data from an online questionnaire and four regional workshops, and grounded theory to develop theory around the unexplored topic.

2. Literature Review

2.1 Rural Tourism Development

RT in the broader sense refers to "tourism activities that occur in the countryside" (Yanan, Ismail & Aminuddin, 2024, 3). It has been actively promoted for its capacity to contribute to local economic growth and regeneration, conservation of natural resources, and socio-cultural stability around the world (Karali, Das & Roy, 2021; Ginanjar, Riani & Aini, 2024; Yanan, Ismail & Aminuddin, 2024), across Europe (Radović et al, 2024; Vinšalek Stipic, Grizelj & Juric, 2024) and in Finland in particular (Ministry of Economic Affairs and Employment, 2020). It has been in the focus of research for over 40 years, whereby research efforts have clearly intensified during the last two decades (Karali, Das & Roy, 2021). The different themes of RT, however, are unequally represented in research. The stakeholder theme is so far the second most important theme, however studies have mainly concentrated on the roles of stakeholders, the network, as well as entrepreneurship and funding of RT; the host community has pronouncedly captured the attention in the last decade (Karali, Das & Roy, 2021). Clearly under-

researched topics remain, among others, the assets of stakeholders and the control on tourism resources which could have decisive influence on the sustainability of RT (Karali, Das & Roy, 2021), and which also supports the need for researching the profile of RT developers. In post-covid-19 times, the resilience of RT needs to be investigated to prepare for disruption situations in the future (Karali, Das & Roy, 2021), however, as RT is not homogeneous but comprised of different interests, stakeholders, and environments (Karali, Das & Roy, 2021; Ruiz-Ballesteros & González-Portillo, 2024), this necessitates the examination of the resilience of different groups of actors, including developers as well. Research focusing on leadership in rural destinations development is also limited (Ginanjar, Riani & Aini, 2024).

As the characteristics of the people developing RT are not researched, only indirect references are to be found about the variety of people and organizations, involved in RT development. It is recognized that RT development cannot follow the same strategies as global tourism in general, but it is of crucial importance to empower local communities to use tourism for their benefit, instead of just being used by the tourism industry (Ruiz-Ballesteros & González-Portillo, 2024). Generally, RT could be developed from outside, top-down, according to the so-called exogenous model, including national governments and their policies and external resources such as European Union funding as drivers of RT development, or from inside, bottom-up, by the endogenous, community-driven approach, based on internal factors specific to the area (Biczkowski, 2020). The exogenous model is criticized for the unequal power distribution between stakeholders external and internal to the destination, as well as for the vast economic leakages, leading to concerns about RT developing as an “unintended consequence of external factors” (Ginanjar, Riani & Aini, 2024, 109). Community-based tourism is perceived as a means of benefiting the local community, building capacity of locals (Ginanjar, Riani & Aini, 2024), and sometimes even equalized to RT in total (e.g., Ruiz-Ballesteros & González-Portillo, 2024). The pure endogenous model, however, is hard to implement because of local community’s lack of relations to external actors, funding instruments, and social capital (Biczkowski, 2020). Alternatively, a contemporary neo-endogenous approach could be employed, where local development is based mainly on the activity and resources of local communities but is aided by external instruments, and the interplay of endogenous and exogenous factors is able to achieve efficiency and boost the potential of the local community (Biczkowski, 2020; Ruiz-Ballesteros & González-Portillo, 2024). This model gives the local community the role of a factor, not only a subject of development, promoting cooperation and development based on genuine needs (Biczkowski, 2020). By aiding instruments, funding could be meant. Funding for RT can come from a variety of sources, including not only local, but regional, and national authorities, international financiers, private investors, and public-private partnerships (Radović et al, 2024). At the same time, the neo-endogenous model assigns NGOs, like LEADER action groups, the role of a mediator between internal and external factors. Cooperation and networking are emphasized in this model, and development is only possible in cooperation within the local community and tourism business, and of them with external international funding agencies, NGOs, tour operators and multinational enterprises (Tosun, 2000; Popovich & Relja, 2024).

It is acknowledged that effective leadership is needed to achieve competitiveness and sustainability in the RT destination. Among the requirements to the leaders, developing and coordinating tourism in these destinations are cultural sensitivity, innovation skills, experience, networking and cooperation, decision-making, resource management (Ginanjar, Riani & Aini, 2024). Organization and planning of tourism development include versatile tasks of planning, marketing, financing and coordinating tasks of different tourism actors (Vinšalek Stipic, Grizelj & Juric, 2024). These requirements raise the questions of who and how is preparing, training, and investing in the individuals, who become leaders of RT. At the same time, inadequate implementation of development plans and strategies and lack of experts in the field of tourism have been recognized to be among the significant problems of tourism management (Vinšalek Stipic, Grizelj & Juric, 2024).

Finland’s current tourism strategy indicates the roles of different types of actors for tourism development, while at the same time underlining that rural and urban areas are not separated in the national strategic planning (Ministry of Economic Affairs and Employment, 2020). By this logic, the general developmental roles of each actor should also be applied to RT:

- public sector provides development services, legislation, and funding for tourism;
- Visit Finland is in charge of the image marketing of Finnish tourism and the building of international cooperation;
- regional tourism organizations have an emphasized role as developers of tourism in their respective regions, being in charge of cooperation, product packaging, and marketing;
- regional development companies provide developing services to tourism enterprises and supervise development projects;

- educational institutions provide tourism education, conduct research and development projects;
- tourism enterprises are responsible for developing their own business and participating in the tourism network (Ministry of Economic Affairs and Employment, 2020).

2.2 Resource-Based Approach

Coined by Barney (1991), the resource-based view (RBV) is usually applied to a company. In tourism, however, production relies on the totality of resources of the highly networked destination instead of on those of a single company (Turunen, 2006). The RBV concept is related to the internal part of SWOT analysis (strengths and weaknesses) and relies on the understanding that competitive advantage is accomplished by implementing strategies that maximize internal strengths in response to opportunities emerging from the environment, while neutralizing external threats and avoiding internal weaknesses (Duarte Alonso, 2016). The existing literature indicates that a competitive advantage could be perceived as the implementation of strategies for value creation which are not simultaneously used by competitors (Duarte Alonso, 2016, citing Barney, 1991) and as the relationship between internal organizational characteristics and the performance of the economic unit (Massukado-Nakatani & Teixeira, 2009). In the context of competitive advantage, the RBV is based on the principles of heterogeneity and immobility of resources. Heterogeneity means that superior productive factors with limited supply are present, while immobility indicates that resources are difficult or impossible to trade (Duarte Alonso, 2016). Some studies (Turunen, 2006; Duarte Alonso, 2016) explore the resource attributes for sustained competitive advantage in the context of tourism:

- valuable – associated with niche market products, emphasizing on authenticity
- rare – not possessed by a large number of competitors, organized in destination-specific bundles
- imperfectly imitable – not duplicable by competitors, tacit, often containing historical and geographical features, people-intensive and skill-based
- non-substitutable – experiential, embedded in the local context.

The resources can be divided into tangible, financial and physical, which are measurable in a balance sheet, and intangible, related to the skills, capabilities, and reputation of the organization (Massukado-Nakatani & Teixeira, 2009; Turunen, 2006). The bundle of tangible and intangible resources is seen as a source of competitive advantage (Turunen, 2006). The categorization of resources is presented in Table 1.

Table 1: Categories of resources (adapted from Massukado-Nakatani & Teixeira 2009; Turunen, 2006)

Category	Subcategory	Description
Tangible	Physical	Installations, infrastructure, equipment, physical technology, geographical location
	Financial	Assets, royalties, rents, loans, grants, invoicing
Intangible	Human	training, experience, judgement, intelligence, professional work, management
	Organizational	organizational structure, personnel, controlling mechanisms, coordination, planning, organizational culture, internal and external relationships, networks and network embeddedness, cooperation
	Reputation	image of company, destination, country, networks, etc.
	Skills and capabilities	general and industry-specific skills, capabilities, competences

Developers are not the subject of research, either in the context of RBV or in relation to tourism. Only indirect references could be found. Turunen (2006) states that different types of organizations, multiple industrial sectors, and public actors come together in the destination. She also points out that the destination structure could be improved and renewed by creativity, highly trained specialists, and tourism-specific know-how. Thus, these are resources that should be utilized in tourism development. Farida et al (2022) point out that the development of RT is based on local culture and sustainable environment which would be impossible without involving a variety of stakeholders, such as local communities, governments, NGOs, the private sector. Thus, when we are speaking about the developers of RT, this encompasses heterogeneous and cross-sectoral representation. Both in terms of social sustainability and competitiveness, the community must be involved in

decision-making, including development, of RT (Farida et al, 2022), however power relations should be considered. Within the framework of community-based tourism, it is widely studied that the local community is usually dependent on the resources of others – competence of NGOs and funding of public and governmental actors – making the power disproportionate (Ginanjar, Riani & Aini, 2024; Farida et al, 2022).

On the one hand, developers themselves could be perceived as organizational resources, but on the other hand, they are also utilizing and facilitating the use of all other types of resources, both tangible and intangible. The ability to combine and mobilize resources leads to the creation of core competences, which are the main drivers to develop a sustainable competitive advantage (Turunen, 2006). Consequently, the developers both as a crucial resource and as resource facilitators have a key role for the competitiveness of RT. Tourism actors must renew their competences continuously to accomplish coherence with their environment (Turunen, 2006). Some studies indicate that available resources are often not used or inefficiently used in value creation (e.g., Massukado-Nakatani & Teixeira, 2009). By acquiring more information about developers' characteristics and how they relate to value, rarity, imitability, and non-substitutability, it is possible to assess what is needed to further improve their performance in terms of value creation.

3. Methodology

The research problem of defining the profile of Finland's RT developer arose during the collection of empirical data for the national Rural Finland Tourism Hub Project. As part of this effort, developers were invited to complete an online questionnaire exploring the current state and future directions of RT in the country. The research problem was formulated only after the questionnaire has been designed and launched. Thus, the study relies on the secondary use of questionnaire results. While questionnaire results were fully accessible, the study was unable to influence the design of the questionnaire. In addition to the questionnaire, the inputs of four regional participatory workshops were utilized. The free-entry workshops, which targeted developers emphasizing on the broad definition of RT, were conducted as part of the project's kickoff tour and were designed to complement the questionnaire, delving deeper into more complex questions of the same topic. The workshop results were also used in this study as secondary data.

All the empirical data was collected in September-November 2024. The questionnaire was offered both in Finnish and English, distributed by the communication channels of the organizations implementing the project, and altogether 86 responses were gathered. The has engaged responders from all 15 development regions (n=82), by the division of the Centre for Economic Development, Transport and the Environment (2024), with 5-14% of the responders operating in each of them. Only Southern and Northern Savonia, Häme, Southeast Finland, and Kainuu were underrepresented (1-4% of responders from each). Only one person used the English version of the survey, while all the rest responded in Finnish. The workshops were held in Finnish and a total of 69 target group representatives participated. The results were analyzed both qualitatively and quantitatively with an accent on the narrative approach, leading to the creation of the typical profile of RT developers.

The study used grounded theory, whereby the theory emerged from the data instead of starting with a hypothesis. The method was particularly chosen because of the qualitative approach and little prior knowledge on the topic, which makes the research broad and exploratory.

4. Results

4.1 Results of the Questionnaire

The developer of RT in Finland is well educated, with 91% of respondents (n=84) having at least a bachelor's degree. The vast majority of developers are women (88,2%, n=85). They are typically of middle age (Table 2), but the youngest respondent reported the age of 26, and the eldest was 75-year-old.

Table 2: Age of rural tourism developers in Finland (n=79)

	Min	Max	Mean	Median	Standard deviation
years of age	26,0	75,0	49,2	50,0	11,5

The scope of expertise of RT developers is regional, which supports the existing literature. Almost half of the respondents (40%, n=85) admits not being familiar with Finland's current national tourism strategy. The majority's development work is, however, driven by a regional tourism strategy (82%, n=71) or a tourism-related development plan (51%, n=71). Responders also mentioned other documents, non-specific to tourism, to be relevant to their work: LEADER-strategy, provincial strategy, association strategy, funding programme

documents, regional or company-specific business plans, municipal policies, as well as international conventions on aspects of sustainable development. The objectives before the rural developer are various and complex:

- strategic – deriving from regional or local tourism strategies, master plans, etc.
- project-specific – related to strategic goals but bound to the project requirements
- performance-related – increase in number of tourists, number of new routes, products, revenue, number of new jobs, number of company visits
- functional – marketing-related, communicational, accessibility-related, cooperation-related, development of services, internationalization, acquisition of funding, etc.
- local, regional, more rarely national, international
- personal – to make a living, to increase one's competence
- non-specific to tourism – where tourism is a means of regional development or a single target of development among others

The developers only have little time resource at their disposal to implement their RT related tasks. The reported share of worktime reserved for RT development was 25% on average (Table 3). For some respondents this was a difficult estimate, as (rural) tourism in some cases is not a strictly defined task for them or their tasks vary depending on customer needs. Besides (rural) tourism development, the respondents reporting performing the following tasks: regional development, other development, teaching, research, keynote speech delivery, forecasting, daily coordination and marketing of tourism, public administration, project planning, business advising, cultural designer tasks, environmental expert tasks, office work, farming, communication, tasks related to sports, youth, culture, development of air transport, supervisor work, event production, entrepreneurship, funding advice. Among these answers were also "livelihood" and "paid work" which suggests that not all RT developers get paid for the development tasks.

Table 3: Proportion of working time reserved for the development of (rural) tourism (n=67)

	Min	Max	Mean	Median	Standard deviation
%	0,0	100,0	41,6	25,0	36,9

One cannot recognize the RT developers by their title. In terms of job titles (n=79), only six respondents' titles contained the word "tourism" (7,6%). The most common job titles (Table 4) were project (30%) and research & development related (19%). This is not a surprise, as RT development is heavily dependent on project funding (Table 5). It also corresponds with the typical tourism development tasks indicated in literature.

Table 4: Job titles categorization and share (n=79)

Category	Number of titles related	Share of answers
project-related	24	30%
R&D	15	19%
specialist positions	11	14%
consulting & advisory (both private & public)	9	11%
entrepreneurs	7	9%
leadership positions	6	8%
educators	3	4%

The average estimated share of project work in RT development is 70%. RT development is reportedly funded predominantly by European Union funds, mainly the European Agricultural Fund for Rural Development (87%, n=82), as well as by direct municipal and provincial funding (29%).

Table 5: Estimation proportion of the development of rural tourism implemented as projects in the operating area of the respondent (n=67)

	Min	Max	Mean	Median	Standard deviation
%	0,0	100,0	62,4	70,0	28,9

The typical employer of a RT developer (Table 6) is a development organization (23%), a municipality (16%), or an education institution, but it is not uncommon for private companies, village associations, and LEADER groups to include such functions. Surprisingly, only a few members of regional tourism organizations' personnel have identified themselves as RT developers: these organizations typically coordinate tourism on regional level, including several rural destinations, sites and attractions, although they are operating city-led. This contradicts Finland's tourism strategy's intent to develop RT integrally. Many respondents marked more than one employer or shared that their employers change often, they are currently between employments, or they are self-employed. This paints a picture of the ephemerality of RT development positions, which could be equated to freelance work.

Table 6: Types of organization employing (rural) tourism developers (n=85)

Organization type	n	Prosentti
development company / organization	23	27,1%
municipality	16	18,8%
education institution	15	17,6%
tourism association	11	12,9%
private company	10	11,7%
village association	9	10,6%
LEADER-group	5	5,9%
regional tourism organization	5	5,9%
other association	4	4,7%
other public organization	2	2,4%
advisory organization	2	2,4%
foundation	2	2,4%

Individual respondents reported work titles such as "landlady" and "farmer" which added to the village association and LEADER group employment define a significant share of the developers as local community representatives, confirming the neo-endogenous development approach.

The needs for competence strengthening of RT developments (n=86) are as versatile as their work and comply with the forementioned requirements for leadership of sustainable RT development. The top three competence needs are future and forecasting skills (60,5%), productization and development of tourism experiences (57%), as well as travel trends and research (53,5%). Networking, cooperation and involvement of stakeholders in development (48,8%) do not fall far behind. The respondents have identified having needs for competence strengthening in every suggested item of each of the categories: marketing and sales, digital communications and technology, responsibility and sustainability, funding and projects, and other competence. The least requested competence topics were customer service (7%) and project management (20,9%). Important topics raised by the respondents in this respect were also safety and security, peer learning and benchmarking, acquiring and utilizing feedback and recommendations.

4.2 Results from the Workshops

Females dominated the workshop participation, where only 9 male participants (13%) were observed. This confirms the gender distribution of developers observed in the questionnaire.

The workshops explored more complex questions that the questionnaire such as current state, changes and future of RT development from the point of view of its developers. Although the workshops were regionally implemented, there were only little region-specific details in the raised topics, opportunities, and challenges, while most of the concerns and observations of RT developers were shared. The workshop results, summarized in Table 7, emphasize the need for cross-administrative networking and cooperation not only on business level but also among developers and funding institutions enabling development. Many of the challenges, such as asymmetrical distribution of funding, geopolitical events, EU funding conditions, national policies, cannot be directly approached and affected by the RT developers. Some of the important topics characteristic for RT development are broader and structural, concerning the whole society and Finnish culture, e.g., lack of cooperation, generational change, wellbeing, predominant project-based development. In this difficult

environment and amid societal change, however, the RT developers retain their focus on opportunities and their positive view of the future.

Table 7: Topics raised by the rural tourism developers

Important topics of RT development	Opportunities	Challenges
joint marketing building of cooperation, especially across administrative borders generational change in businesses shortage of manpower wellbeing of rural inhabitants and entrepreneurs continuity and consistency of development work cross-regional development and cooperation digitalization of tourism business	nature resources and activities cultural and historical resources exotic characteristics of Finnish countryside – darkness, coldness, walking on ice, slow travel, sauna, aurora borealis flexible LEADER-funding sustainable development alternative tourism innovativeness heat-escape tourism bleisure tourism and digital nomadism increase in domestic leisure tourism after COVID-19 families with children as a target group of RT immigration local food and food tourism transformational travel wellbeing from nature strong tourism education third sector as service providers cleanliness of Finnish nature and food	lack of resources in the countryside efforts and funding with asymmetrical distribution lack of continuum in development related to project work concrete needs and challenges but only general, untargeted solutions in offer multitasking and multiple responsibilities lack of control of RT interests nationally sufficient and need-fitting funding lack of productization to benefit from resources global and regional geopolitical events development events mainly online, lack of networking, visits, study trips ease of access to knowledge and information EU multiannual funding programmes' slow start and unclear conditions accessibility of Finland and of rural destinations within survival vs. development in tourism business difficult acquisition of private funding for RT development

5. Conclusions and Discussion

Table 8 summarizes the profile of the RT developer, built based on the dominant responder characteristics. The vast variety and fragmented nature of the characteristics observed, however, should not be neglected.

The limitations of the study include factors like the lack of Swedish version of the questionnaire and the implementation of the workshops only in Finnish. The difficulty reaching developers with minority, immigrant or international background might have left additional significant profiles out of the results. This, however, does not diminish the significance of the established profile. In addition, the constraints of secondary data have left many topics related to the developer's profile unapproached.

The results paint a picture of the RT developers, on the one hand, as a super-human juggling with a multiplicity of complex objectives and a broad scope of work, but on the other hand, the needs and challenges of RT development are evidently dependent more on external factors than the input of these developers. Help is needed from outside – in the shape of policies, national forums, funding practices, streamlining cooperation to enable the work of RT developers.

Table 8: The profile of Finland's rural tourism developer

	Gender:	Female
	Age:	50-years-old
	Language:	Finnish
	Education:	Bachelor's degree or more
	Expertise:	project management, business development, funding

	Work title:	Project Manager
	Work level:	operational
	Work scope:	local /regional, strategic, rural-specific, non-specific to tourism
	Work mode:	freelance, self-employed, changing employers often
	Focus on RT:	part-time, approx. 25%
	Competence needs:	forecasting, productization, trends and research, networking, cooperation, stakeholder involvement

The importance of RT developers lies in the fact that they are a human resource, but they are also enablers and facilitators of all the other resource categories concerning RT development: physical, financial, reputational, organizational, and skill related. Hence, they should be valued and supported to maximize the development results. Special attention should be paid to the competence building of developers, whereby more efforts and funding should be focused on building and maintenance of their capacity to develop RT and the rurality through tourism. When given broad tasks and responsibilities, they should be provided appropriate training, time resources, and access to sufficient knowledge to tackle the challenges.

In the framework of RBV, developers of RT contribute to the competitive advantage by the heterogeneity factor, being highly skillful, superior to the production, and limited, hard to obtain. However, the ephemerality of funding and job positions do not support the second element of competitiveness, namely immobility of resources. Developers are let exit their working environment too easily, not allowing them to build continuity and consistency neither from the point of view of their own work and wellbeing, nor from the perspective of the topic they are developing. This is evidence that their employers or customers do not realize their non-substitutable character, which becomes clear at latest when a new project starts, and everything needs to be built up again from ground zero. The evidence of many local community members' involvement in RT development in combination with some urban-led development supports the contemporary neo-endogenous approach. Authenticity of local developers makes them valuable resource. Their networks and tacit knowledge assign them rareness and non-imitability. Realizing these attributes of competitive advantage carried by the developers would benefit RT development greatly.

By highlighting the crucial role that developers play in RT, the study calls for targeted strategies to enhance their competencies and to foster a more supportive environment for their work, with the expectation that the offered recommendations are valuable for policymakers and stakeholders focused on sustainable rural development.

Acknowledgements

This study is part of the nationwide Rural Finland Tourism Hub Project which would not have been possible without the funding of the European Agricultural Fund for Rural Development.

References

- Biczkowski, M. (2020) "LEADER as a mechanism of neo-endogenous development of rural areas: the case of Poland." *Miscellanea Geographica*, 24(4), 232-244. <https://doi.org/10.2478/mgrsd-2020-0041>
- Centre for Economic Development, Transport and the Environment (2024) "Frontpage." <https://www.ely-keskus.fi/en/web/ely-en/frontpage>
- Duarte Alonso, A. (2016) "Exploring a developing tourism industry: A resource-based view approach." *Tourism Recreation Research*, 42(1), 1-14. <https://doi.org/10.1080/02508281.2016.1239332>
- Farida, N., Trihastuti, N., Taufiq, M. & Obrenovic, B. (2022) "Competitive Advantage Model of Rural Tourism Studies During Covid-19 Pandemic Era". *International Journal of Innovation and Economic Development*, 8(4), 24-32. <https://doi.org/10.18775/ijied.1849-7551-7020.2015.84.2003>
- Ginanjar, R., Riani, A. L. & Aini, I.N.Q. (2024) "Local Champion: A New Leadership Perspective to Create Sustainable Tourism in Rural Communities". *The East-South Management and Business*, 2(2), 105-117. <https://doi.org/10.58812/esmb.v2i02.196>
- Karali, A., Das, S. & Roy, H. (2021) "Forty years of the rural tourism research: reviewing the trend, pattern and future agenda". *Tourism Recreation Research*, 49(1), 173-200. <https://doi.org/10.1080/02508281.2021.1961065>
- Massukado-Nakatani, M.S. & Teixeira, R.M. (2009) "Resource-based View as a Perspective for Public Tourism Management Research: Evidence from Two Brazilian Tourism Destinations". *BAR - Brazilian Administration Review*, BAR - Brazilian Administration Review, 6(1), 62-77. <https://doi.org/10.1590/S1807-76922009000100006>

- Ministry of Economic Affairs and Employment (2020) Achieving More Together – Sustainable Growth and Renewal in Finnish Tourism Finland's Tourism Strategy 2019–2028 and Action Plan 2019–2023. <http://urn.fi/URN:ISBN:978-952-327-511-9>
- Popovich, T. & Relja, R. (2024) "The role of tourism as a factor of rural development in the strategic and field context of Croatia: Experts' perspectives". Book of Proceedings: 106th International Scientific Conference on Economic and Social Development, 124-139.
- Radović, G., Vuković, P., Drăcea, R. & Zejak, D. (2024) "Financing of rural tourism in Romania, Serbia and Montenegro in the Period of Integration into the European Union". Proceedings of the International Conference on Business Excellence, 18, 2664-2684. <https://doi.org/10.2478/picbe-2024-0223>
- Ruiz-Ballesteros, E. & González-Portillo, A. (2024) "Limiting rural tourism: Local agency and community-based tourism in Andalusia (Spain)". Tourism Management, 104, 104938, 1-9. <https://doi.org/10.1016/j.tourman.2024.104938>
- Tosun, C. (2000) "Limits to community participation in the tourism development process in developing countries". Tourism Management, 21(6), 613-633. [https://doi.org/10.1016/S0261-5177\(00\)00009-1](https://doi.org/10.1016/S0261-5177(00)00009-1)
- Turunen, H. (2006) "Internationalisation of small and medium sized enterprises in the tourism industry: Towards a resource based view of location bound companies". Matkailututkimus, 2(1), 4–18. <https://journal.fi/matkailututkimus/article/view/90803>
- Vinšalek Stipic, V., Grizelj, N. & Juric, S. (2024) "Sustainable tourism indicators as a factor of sustainable development of rural areas – a literature review". Book of Proceedings: 106th International Scientific Conference on Economic and Social Development, 140-146.
- Yanan, L., Ismail, M.A. & Aminuddin, A. (2024) "How has rural tourism influenced the sustainable development of traditional villages? A systematic literature review." Heliyon, 10(4), e25627, 1-23. <https://doi.org/10.1016/j.heliyon.2024.e25627>

Second Homes and Potential Impacts on Return Migration and Rural Tourism Development

Rossana Santos

College of Technologies and Management, University of Madeira, Madeira, Portugal

CITUR-Madeira-Centre for Tourism Research, Development and Innovation, Madeira, Portugal

rossana.santos@staff.uma.pt

Abstract: The emergence of second homes in Portugal are strongly related to emigration (especially between 1960-1974) and out-migration (between 1960-1973) and the consequent depopulation of many rural areas where, apart from new housing construction, the emigrants' and out-migrants' first homes were frequently converted into second homes. These territories are still socially depressed, mainly due to the inability to create employment and income opportunities, as also attract and nurture the establishment of communities. In this case, culture can be a generator of important external economies of human capital and a catalyst for tourism development. The tourism sector, too, under certain conditions, can be a driving force for economic activity in general. Therefore, the UNWTO Framework Convention on Tourism Ethics (2020) states the strategic importance of the association of local populations in tourism activities. Thereby, this study suggests that those second homes can encourage return migration and rural tourism development in Portugal. How return migration will address rural culture and tourism development will also influence how visitor's perceive local culture and hospitality in the places of origin of Portuguese emigrants. With this aim, 5,157 Portuguese emigrants were surveyed through the application of a questionnaire to assess the potential impact of their return on tourism development in Portugal. Results show that Portuguese emigrants of the working age and with a second home in a rural area consider that their participation in associations of Portuguese emigrants in the host country, has been a way of maintaining their culture of origin. If they had a job in the tourism sector, in Portugal, would like to control their own working hours so that they can have a rural lifestyle and reconcile with the practice of agriculture, mainly for self-consumption. While locals, their return can also strengthen rural culture and, consequently, develop rural tourism in Portugal. The financial benefits are similarly key variables that can encourage them to rent accommodation units in the second home of their family in the place of origin.

Keywords: Second homes, Return migration, Rural culture, Tourism development, Portugal

1. Introduction

The identity debate has increased in intensity since the emergence of the phenomenon of globalization. In relation to emigrants, they are often forced to assimilate a dominant national culture and their identity can become hybrid. However, when considering the Portuguese case, it is possible to adhere to transnational practices without questioning belonging to a nation-place considering emigrants intention to maintain their cultural difference from the culture of the host country. One way they manifested their symbolic commitment to Portugal was through the self-building of second homes in their place of origin. These are, above all, large houses with individual, exuberant and expressive styles, and sumptuous interior that distinguish themselves in rural landscapes. The places of origin of Portuguese emigrants are rural areas with only populations of up to 2000 inhabitants. This is mainly due to its inability to create opportunities for jobs and better salaries. In this regard, culture can be a generator of important external economies of human capital and a catalyst for tourism development (see e.g. Walmsley, 2003). Since authenticity of tourism experiences is also critical variable to offer a competitive advantage (Rosado-Pinto and Loureiro, 2023), this study analyse potential impacts of those existent second homes on return migration and, consequently, rural culture and tourism development in Portugal. The first two sections begin by explaining the emergence of second homes, considering the Portuguese case, and its potential impacts on return migration (of the working age) and rural tourism development in Portugal. The methodology, results and discussion of the study will be topics also covered. The main conclusions and directions for future studies are put forward in the final section.

2. The Phenomenon of the Owner-Builders of Second Homes in Portugal

This section presents a framework for Portuguese emigration from the second half of the twentieth century to the present day, aiming at related it with the emergence of the owner-builders of second homes in the place of origin. In this regard, the great wave of Portuguese emigration took place between the mid-1950s and the mid-1970s and was linked to post-war European economic growth, in an essentially intra-European process of massive transfer of labour from the peripheral south to the industrialised north, in which Portugal was substantially involved (Barreto and Mónica, 1999). The various studies published in Portugal cite the lack of jobs and salaries that would provide a more dignified and secure future as the main reason for the evolution of the phenomenon that led to the exodus of isolated emigrants and entire families (see e.g. Rocha-Trindade, 1986;

Ferrão, 1996). Portuguese emigration, however, did not end in 1973-1974, and it increased in the late 1980s and early 1990s (Ferrão, 1996). But the 1990s were clearly marked by a progressive reduction in estimated flows and especially by the affirmation of a logic of temporary emigration, involving long-distance and wide-ranging forms of “commuting” with some EU countries (Ferrão, 1996). With the proximity of the countries and the ease of travel, emigrants never completely severed the umbilical cord with their country of origin. Various authors state that the most evident way in which Portuguese emigrants affirmed their material and symbolic commitment to Portugal was through a common project to build a second home there, revealing the extent to which they were linked to their origins (see e.g. Silva et al., 1984; Lewis and Williams, 1986; Rocha-Trindade, 1986; Villanova, et al., 1994).

The analysis of a selected case studies of Portuguese communities settled in the host countries also suggests that the experience of emigration didn't contribute to rejecting their cultural identity of origin (see Beswick, 2007; Campos and Siqueira, 2006; Gomes, 2001; Klimt, 2009; Nunes, 2008; Rocha-Trindade, 1986; Webb, 1999). Most Portuguese emigrants opted to build a new house themselves in the place of origin, rather than undertaking a renovation project, mainly as a strategy of differentiation from the past, because of their improved socioeconomic condition and the individual features reflected in the transformations of their own taste (Villanova, 1994:15). The owner-builders of second homes still have preserved the rural organization of the houses in the region with a vegetable garden, orchard and trellises on the sides and back of the house (Villanova et al., 1994). Most of them also have other cultivated lands scattered through the village (Villanova et al., 1994). Recognizing that second homes built by Portuguese emigrants in the place of origin continue to appear places of absence, its potential effects on the return of the new generation of Portuguese emigrants, as also on rural culture and tourism development will be topics covered in the following section.

3. Potential Impacts of Second Homes on Return Migration and Rural Tourism Development

This section provides a discussion about an internationally accepted definition in literature of second homes and its potential effects on return migration and tourism development in rural areas, considering the Portuguese case. The literature review in second homes shows the lack of an internationally accepted definition, since some authors consider it in the field of tourism (see e.g. Jackson, 1986; Cavaco, 2003; Müller, 2002; O'Reilly, 2003), other authors consider second homes at the intersection of tourism and migration (see e.g. Hall & Williams, 2002; Hall, 2005; Müller, 2006), while others consider second homes a consequence of the increase in mobility as a lifestyle (see e.g. Mazón and Aledo, 2005; Mantecón, 2008; Oliveira et al., 2015). In Portugal, the expansion of second homes has had some special features that are strongly related to emigration and out-migration (Cavaco, 2006; Santos and Costa, 2009; Oliveira et al., 2015; 2023). Studies also show that the main reasons for Portuguese emigrants to purchase or construct second homes, in the place of origin or in large cities or close to them, are related with holidays, retirement and/or savings investment (see e.g. Cavaco, 2003; 2006; Oliveira et al., 2015; 2023).

According with Gallent (2014: 174) analysis of the impacts of second home ownership in rural areas, around the world, regularly align with a “loss of community” thesis, linking second homes to a range of negative socio-economic consequences. During the 1970s, this debate was primarily focused on rural areas wherein second homes were sometimes seen as contributing to the development of elite landscapes (Hall and Müller, 2004; Müller and Hall, 2018). Regarding this topic, the second homes in consideration in this study already exist in rural areas of Portugal (see section 2). While locals, nostalgia and place attachment of Portuguese emigrants are to what is observed in permanent residents (see Adie and de Bernardi, 2020). On the other hand, Müller and Hall (2018:3) argue that it is the combination of factors that influences to what extent second homes are seen as a “curse or blessing” and whether second home tourism is seen as a challenge or opportunity. In this scope, Afonso Pérez et al. (2022) argue that different economic impacts can occur in tourism destinations with a strong presence of second homes compared to resorts and hotel destinations, whereas in rural communities - where the population decrease, second homes can become an important economic contributor. Despite second homes having been studied from the point of view of changing landscapes and lifestyle, studies have also evidenced that its beneficial economic effects in Portugal generally outweigh some negative ones for the local economy, due to its contribution to the generation of income for the local population, government accounts and reduction of seasonality, (Oliveira et al., 2015).

Müller (2004) stands out that the owners of second homes, including foreigners, consume as much or more local products and services than permanent residents, so that this demand for agricultural products by temporary residents may cause price inflation, which may affect the purchasing power of the local population. However, according with Portuguese Institute of Statistics, in Portugal, rural areas have populations of up to 2000. Moreover, the enjoyment and habit of Portuguese emigrants for the practice of traditional agriculture for self-consumption - in the second home and other lands they own scattered in the place of origin (see e.g., Cavaco, 2003; Villanova et al., 1994), can also have a positive effect on the maintenance of traditional agriculture landscape and as a complementary activity to increase their disposable income (Santos, 2021). The tourism sector, too, can be a driving force for rural economic activity in general, helping to reduce existing development asymmetries and improve the quality of life of local population (see e.g. Fleischer and Felsenstein, 2000; Mahony and Zyl, 2002; Crompton et al., 2016; Ruzic and Demonja, 2017; Ferrari et al., 2018; Tohmo, 2018). In this regard, studies have shown that Portuguese emigrants of the working age and with a second home in the place of origin would like to return, invest and have a job in the tourism sector - especially in self-employed secondary residence services (Santos, 2021). They also have more financial capital, knowledge and professional experience in tourism and/or hospitality sectors acquired while settled abroad (Santos, 2021). Their return can also encourage tourism demand in rural areas, particularly in rural and local accommodations types (Santos and Freitas, 2023).

Rosado-Pinto and Loureiro (2023) argue that guests appraise the authenticity of the upper accommodation experience regarding their own knowledge about what is original and genuine. In this regard, considering the rural culture of Portuguese emigrants, while locals, this study suggests they should be the hospitality and tourism promoters in rural areas. According with Pers et al. (2018) there can be strong emotional bonds between people and the properties where earlier generations have farmed and lived. Other authors also mention that the younger age of homeowners (Bieger et al., 2007), as well as the financial benefits (Beritelli et al., 2008), positively influence their propensity to rent out their properties for the opportunity of income. Thus, the new generation of Portuguese emigrants may have greater propensity to rent accommodation units in the second home of their family in the place of origin and promote rural tourism development.

4. Research Design and Methods

The discussion conducted in sections 2-3 suggests that existent second homes can encourage return migration and, consequently, rural culture and tourism development in Portugal. Therefore, the following objectives have been defined for this study: i) to assess if the experience of emigration contribute to Portuguese emigrants of the working age rejecting their cultural identity; ii) if they would like to reconcile tourism with the practice of agriculture, mainly for self-consumption; and iii) if they intend to rent for tourism purposes the second home (of their family) in the place of origin. Because official data on the number and characteristics of Portuguese emigrants around the world is not available, the goal has been to obtain relevant information from as many Portuguese emigrants as possible, leading to the option of an unrestricted sample. For the preparation of the questionnaire, nominal scales, checklists, and ratio scales were used.

The data collection process started on 1 July 2011 and ended on 31 October of the same year, with a total of 5157 completed and valid questionnaires. From 1 July until 31 October the questionnaire was carried out by mail and internet. Initially, 4000 questionnaires were sent to households of Portuguese emigrants in the host countries, 54 were returned and only 9.32% were responded to. By 31 July, the questionnaire was conducted in the press and in digital electronic portals of Portuguese communities abroad, as well as by sending e-mails to emigrant associations and official bodies directly related with emigration. During the month of August, the questionnaire was conducted on the social network Facebook, through the official pages of famous Portuguese singers, resulting in the gathering of another 4800 completed and valid questionnaires. In the last two months of data collection, the questionnaire continued to be conducted on a Facebook Study Page. During this period, with the goal of informing Portuguese emigrants about the forms of participation in the study, the page was released, several times a day, through the Portuguese radio and television. Data analysis was carried out by means of quantitative descriptive analysis (frequencies and crossings) and tests of the correlation of variables, as well as a qualitative analysis through the application of student's t-tests and ANOVA analyses (Kruskal-Wallis and Mann-Whitney). This analysis will be illustrated and discussed in the next section.

5. Results and Discussion

Results of the study described in section 4 show that the data obtained with Pearson's correlation test corroborate the hypothesis that the experience of emigration did not contribute to Portuguese emigrants rejecting their culture of origin. This is because they show that their participation in associations of Portuguese

emigrants in the host country, as a way of maintaining Portuguese culture, positively influences their affirmation that their culture is Portuguese ($r=0.602$) (table 1). On the other hand, the results of this test do not show that a set of factors influenced the Portuguese culture of emigrants.

Table 1: Participation in Portuguese associations in the host country as a way of maintaining Portuguese culture vs the culture identified as Portuguese

The culture identified as Portuguese	Participation in Portuguese associations in host country
Pearson Correlation	.602**
Sig. (2-tailed)	.000
N	494

** . Correlation is significant at the 0.01 level (2-tailed).

Own Elaboration

The reasons given by the 13.1% of emigrants who report having (and perhaps having) a different culture from the Portuguese one and those who do not know or did not answer, are mainly related to having little contact with Portuguese culture and identifying more with the culture of the host country. Regarding emigrants who are undecided, they most often mention the factors related to adaptation to the host country. The analysis of the intersection of these variables allows us to add that, although there is a higher percentage of emigrants aged 29-39 who do not attend (or have attended) Portuguese associations in the host country and do not recognize their influence on their desire to return to Portugal, it is also found that these emigrants, aged between 29-39, are the ones who most claim to attend (14.4%) and recognize the influence of participation in these associations on their desire to return (15.9%) (table 2).

Table 2: Age vs Influence of participation in Portuguese associations in emigrants' willingness to return

%		Influence of participation in Portuguese associations in willingness to return				Total
		Yes	Maybe	No	Doesn't no/Doesn't answer	
Age	Less than 18 years old	-	-	-	8.7%	8.7%
	18-28 years old	7.1%	11.2%	10.9%	3.3%	32.5%
	29-39 years old	15.9%	14.6%	23.9%	4.3%	58.8%
	Total	23.0%	25.8%	34.8%	16.4%	100.0%

Own Elaboration

The chi-square independence test was carried out and it has been rejected the null hypothesis. In other words, it has been observed that the age of emigrants influence the location of their house in the place of origin. In this scope, the frequencies analysis also show that the emigrants who are between the ages of 29-39 years are also the ones that mainly refer to have a house in a county with lower index of centrality (or rural area) (table 3).

Table 3: Age vs County of the house in Portugal

County of the house	Age			Total
	Less than 18 years old	18-28 years old	29-39 years old	
Highest centrality index	0,6%	2,1%	6,7%	9,3%
Lowest centrality index	0,3%	7,2%	15,9%	23,3%
Doesn't Know/ Doesn't Answer	1,3%	30,0%	36,1%	67,4%
Total	2,1%	39,2%	58,7%	100,0%

Own Elaboration

As regard the total number of emigrants of the working-age who would like to control their working hours in Portugal if they could have a job in the tourism sector, the data obtained using Spearman and Pearson tests did not allow to conclude anything with this variable and the variable "age" of the Portuguese emigrants. However, the frequencies analysis also enable to observe that the reasons more mentioned by emigrants with ages

between 29-39 years are because they want to i) practice agriculture, mainly for self-consumption (66.5 %); ii) have a rural lifestyle (65.7 %); and ii) have a job in tourism sector (60.4 %) (table 4).

Table 4: Age vs. If emigrants had a job in the tourism sector, in Portugal, would like to control their own working hours due to a number of factors

%		Age		
		Less than 18 years old	18-28 years old	29-39 years old
If emigrants had a job in the tourism sector, in Portugal, would like to control their own working hours due to a number of factors.	a)	-	39.6%	60.4%
	b)	-	33.5%	66.5%
	c)	-	34.3%	65.7%
	d)	-	53.4%	46.6%
	e)	-	41.9%	58.1%
	f)	-	41.3%	58.7%
	g)	-	45.3%	54.7%
	h)	-	41.3%	58.7%
	i)	-	50.0%	50.0%
	j)	-	41.0%	59.0%
	l)	-	44.6%	55.4%
	m)	-	42.1%	57.9%
	n)	-	41.6%	58.4%
	o)	9,1%	34.7%	56.2%

Own Elaboration

Legend: A) I would also want to practice agriculture, primarily for self-consumption; B) I would have a job in the area of tourism; C) I want to have a rural lifestyle; D) I have a hard time getting a permanent job; E) I could have had more than one job; F) I could better reconcile work with my family/social life; G) It would be easier to comply with health commitments (among others); H) I could devote more time to domestic work; I) I'd be less tired by the end of the day; J) I would have a higher level of job satisfaction; L) I would be more productive at work; M) I'd have less intention of changing job; N) I'd have less pressure; O) Did not know/ Did not answer.

The fact most Portuguese emigrants mention that the second home they have in the place of origin belongs to family, may also explain their greater predisposition to invest in self-employed secondary residence services (Santos and Freitas, 2023). Therefore, the hypothesis was also tested that the new generation of Portuguese emigrants approves the possibility of renting accommodation units in the second home in the place of origin if they benefit from the exemption of the municipal property tax (table 5). Again, are the Portuguese emigrants with ages between 29 and 39 that most agree to rent accommodation units in the second home in the place of origin if with exemption from property tax (24.6%).

Table 5: Age vs Rental of rooms to tourists in the second home in the place of origin with exemption from property tax

%		Age			Total
		Under 18 years old	18 - 28 years old	29 -39 years old	
Rental of rooms with exemption from property tax	Yes	-	16.5%	24.6%	41.1%
	Maybe	-	11.6%	15.4%	27.0%
	No	-	6.6%	9.3%	15.9%
	Doesn't no/Doesn't answer	3.9%	5.0%	7.1%	16.0%
	Total	3.9%	39.7%	56.4%	100.0%

Own Elaboration

6. Conclusions

The common project of Portuguese emigrants to build a second home in the place of origin, was the most evident way in which they affirmed their material and symbolic commitment to Portugal, revealing the extent to which they were linked to their origins. The places of origin of Portuguese emigrants are still socially depressed areas mainly due to the inability to create employment and income opportunities, as also attract and nurture the establishment of communities. In this regard, local culture and the tourism sector can be a possible driving force for the rural economic activity in general in these territories. Moreover, the authenticity of tourism experiences is also a critical variable to offer a competitive advantage. There, since the second homes built by Portuguese emigrants in the place of origin continue to appear places of absence, this study assess its potential impacts on return migration, rural culture and tourism development in Portugal.

Data analysis show that Portuguese emigrants of the working age and with a second home in a rural area (in the place of origin) are the ones who most claim to attend and recognize the influence of participation in Portuguese associations on their desire to return. If they had a job in the tourism sector, in Portugal, would like to control their own working hours so they can have a rural lifestyle and reconcile with the practice of agriculture, mainly for self-consumption. While locals, the return of these emigrants can strengthen rural culture and develop rural tourism. Since they are the ones that most refer to have a second home from family in the place of origin, the financial benefits are similarly key variables that can encourage them to rent accommodation units in there. However, this study also highlights that conflicts may arise between family members when the authority over the second home is being transferred between generations. Regarding this issue, new conclusions are only possible through fieldwork in a future study.

Acknowledgement

Funded by national funds through FCT - Portuguese Science and Technology Foundation, within the project reference UIDB/04470/2020. DOI 10.54499/UIDB/04470/2020 <https://doi.org/10.54499/UIDB/04470/2020>



REPÚBLICA
PORTUGUESA

CIÊNCIA, TECNOLOGIA
E ENSINO SUPERIOR

FCT

Fundação para a Ciência e a Tecnologia
MINISTÉRIO DA CIÊNCIA, TECNOLOGIA E ENSINO SUPERIOR

References

- Adie, A. and de Bernardi, C. (2020), "Oh my god what is happening?": historic second home communities and post-disaster nostalgia", *Journal of Heritage Tourism*, Vol 18 No 3, pp. 337-348. <https://doi.org/10.1080/1743873X.2020.1828429>
- Alonsopérez, M., Brida, J. and Rojas, M. (2022), "Second Homes: A bibliometric analysis and systematic literature review", *Journal of Tourism, Heritage and Services Marketing*, Vol 8 No 1, pp. 16-26.
- Barreto, A., and Mónica, M. (1999), *Dicionário da História de Portugal - Suplemento A/E*, Figueirinhas, Lisboa.
- Beswick, J. (2007), "The Portuguese Diaspora in Jersey", Preisler, B., Fabricius A., Haberland, H., Kjaerbeck, S. and Risager, K. (Eds.), *The Consequences of Mobility*, Roskilde University, Denmark, pp. 93-105.
- Beritelli, P., Engeler, I., Laesser, C. and Weinert, R. (2008), Estimating Renting Behavior of Second Home Owners- The Case of Swiss Alpine Destinations, McIntyre, N. et al. (Ed.), *Multiple Dwelling and Tourism- Negotiating Place, Home and Identity*, CAB International, UK, pp. 301-312.
- Bieger, T., Beritelli, P. and Weinert, R. (2007), "Understanding second home owners who do not rent-insights on the proprietors of self-catered accommodation", *International Journal of Hospitality Management (Special Issue on Self-Catering Accommodations)*, Vol 26 No 2, pp. 263-276.
- Campos, S. and Siqueira, M. (2006), "Brazilian and Immigrant Families in Sao Paulo City: Education and Work", *Journal of Comparative Family Studies*, Vol 37 No 4, Autumn, pp. 539-561.
- Cavaco, C. (2003), "Habitação dos Espaços Rurais", *Revista da Faculdade de Letras-Geografia*, Vol 1 No XIX, pp. 47-64.
- Cavaco, C. (2006). *Residências Secundárias e Escolhas dos Espaços de Lazer e de Férias. Geografia de Portugal. Atividades Económicas e Espaço Geográfico*, Vol 3, Círculo de Leitores, Lisboa.
- Crompton J., Ji Y and Dudensing R. (2016), "Sources of variation in economic impact multipliers", *Journal of Travel Research*, Vol 55 No 8, pp. 1051-1064. <https://doi.org/10.1177/00472875156172>
- Ferrão, J. (1996), "Três Décadas de Consolidação do Portugal Demográfico", A. Barreto, and C. Preto (Eds.), *A Situação Social em Portugal, 1960-1995*, Instituto de Ciências Sociais da Universidade de Lisboa, Lisboa, pp. 165-190.
- Ferrari, G., Mondejar, J., and Secondi, L. (2018). "Tourists' expenditure in Tuscany and its impact on the regional economic system". *Journal of Cleaner Production*, No 171, pp. 1437-1446. <https://doi.org/10.1016/j.jclepro.2017.10.121>
- Fleischer, A., & Felsenstein, D. (2000), "Support for rural tourism - does it make a difference?" *Annals of Tourism Research*, Vol 27 No 4, pp. 1007-1024. [https://doi.org/10.1016/S0160-7383\(99\)00126-7](https://doi.org/10.1016/S0160-7383(99)00126-7)

- Gallent, N. (2014), "The Social Value of Second Homes in Rural Communities", *Housing, Theory and Society*, Vol 31 No 2, pp. 174-191. DOI: 10.1080/14036096.2013.830986
- Gomes, N. (2001), "Os Portugueses nas Américas: Venezuela, Canadá e EUA", *Janus* 2001. https://www.janusonline.pt/arquivo/2001/2001_3_2_5.html
- Hall, M. and Müller, D. (2004), "Second Homes Curse or Blessing? Revisited", Hall, M. and Müller, D. (Eds.) *Tourism, Mobility and Second Homes: Between Elite Landscape and Common Ground*, Blue Ridge Summit: Channel View Publications, Bristol, pp.9-20.
- Hall, M. (2005), *Tourism- Rethinking the Social Science of Mobility*, Prentice Hall, England.
- Hall, M. and Williams, A. (2002), *Tourism and Migration- New Relationships between Production and Consumption*, Kluwer Academic Publishers, Netherlands.
- Jaakson, R. (1986), "Second-Home Domestic Tourism", *Annals of Tourism Research*, No 13, pp. 367-391.
- Klimt, A., (2009), "Divergent Trajectories: Identity and Community among Portuguese in Germany and the United States", *Portuguese Studies Review*, pp. 211-240.
- Lewis, J., and Williams, A. (1986), "The economic impact of return migration in central Portugal", R. King (Ed.), *Return Migration and Regional Economic problems*, Croom Helm, pp. 100–128.
- Mahony, K., and Zyl, J. (2002), "The impacts of tourism investment on rural communities: Three case studies in South Africa", *Development Southern Africa*, Vol 19 No 1, pp. 83-103. <https://doi.org/10.1080/03768350220123891>
- Mantecón, A. (2008), *La Experiencia del Turismo- Un Estudio Sociológico sobre el Proceso Turístico-Residencial*, Icaria Editorial, Barcelona.
- Mazón, T. and Aledo, A. (2005), "El Dilema del Turismo Residencial: Turismo o Desarrollo Inmobiliario?" Mazón, T. and Aledo, A. (Eds.), *Turismo Residencial y Cambio Social-Nuevas Perspectivas Teóricas y Empíricas*, Alicante University, Spain, pp. 13-30.
- Müller, D. (2002), "Reinventing the Countryside: German Second-home Owners in Southern Sweden", *Current Issues in Tourism*, Vol 5 No 5, pp. 426-446.
- Müller, D. (2004), "Second Homes in Sweden: Patterns and Issues", Hall, M. and Müller, D. (Eds.) *Tourism, Mobility and Second Homes: Between Elite Landscape and Common Ground*, Blue Ridge Summit: Channel View Publications, Bristol, pp.244-258.
- Müller, D. (2006), "The Attractiveness of Second Home Areas in Sweden: A Quantitative Analysis", *Current Issues in Tourism*, Vol 8 No 4/5, pp. 335-50.
- Müller, D. and Hall, M. (2018), "Second Home Tourism: An introduction", Hall, M. and Müller, D. (Eds.) *The Routledge Handbook of Second Home Tourism and Mobilities*, Routledge, New York, pp. 2-14.
- Nunes, F. (2008), "Striking a Balance in Canada's Diversity Dialogue - The Case of Portuguese - Canadian Community", *Canadian Diversity*, Vol 6 No 2, pp. 121-125.
- Oliveira, J., Roca, M., Roca, Z. (2015), "Economic Effects of Second Homes: a Case Study in Portugal", *Economics and Sociology*, Vol 8 No 3, pp. 183-196. DOI: 10.14254/2071-789X.2015/8-3/14
- Oliveira, J., Roca, M. and Roca, Z. (2023), "Roots Tourism, Second Homes, Terraphilia in a Portuguese Context", *Rivista di Sociologia del Territorio, Turismo, Tecnologia (Special Issue Roots Tourism)*, Vol 14 No 1, pp. 51-66.
- O'Reilly, K. (2003), "When is a Tourist? The Articulation and Migration in Spain's Costa del Sol", *Tourist Studies*, Vol 3 No 3, pp. 301-317.
- Pers, A., Lagerqvist, M. and Nordin, U. (2018), "The Family And The Second Home. On building sandcastles, sharing places and the passing of time", Hall, M. and Müller, K. (Eds.) *The Routledge Handbook of Second Home Tourism and Mobilities*, Routledge, New York, pp. 266-277.
- Rocha-Trindade, M. (1986), "Do Rural ao Urbano: O Associativismo como Estratégia de Sobrevivência", *Análise Social*, Vol XXII No 91 (2º), pp. 313-330.
- Rosado-Pinto, F. and Loureiro, S. (2023), "What an amazing experience! The role of authenticity and engagement in upscale hotels", *International Journal of Hospitality Management*, Vol 114, pp. 1-12. <https://doi.org/10.1016/j.ijhm.2023.103573>.
- Ruzic, P., and Demonja, D. (2017), "Economic impacts of rural tourism in rural areas of Istria (Croatia)". *Transformations in Business & Economics*, Vol 3 No 42, pp. 31-40. <https://www.bib.irb.hr/913141>
- Santos, R., and Costa, C. (2009). La segunda residência y su relación com el alojamiento turístico en Portugal, Mazón, T. Huete, R. and Mantecón, A. (Eds.), *Turismo, urbanización y estilos de vida - Las nuevas formas de movilidad residencial*, 1ª. Edición, Icaria, Barcelona, pp. 79–96.
- Santos, R. (2021), "Return Migration and Rural Tourism Development in Portugal", *Tourism Planning & Development*. <https://doi.org/10.1080/21568316.2021.1953121>.
- Santos, R. and Freitas, P. (2023), "Second home tourism development in Portugal - expectations of Portuguese emigrants", *E-Review of Tourism Research*, Vol 20 No 1, pp. 156-175. <https://ertr-ojs-tamu.tdl.org/ertr/index>
- Silva, M., Amaro, R., Clausse, G., Conim, C., Matos, M., Pisco, M., and Seruya, L. (1984), *Regresso, Emigração e Desenvolvimento regional em Portugal*, Instituto de Estudos para o Desenvolvimento, Lisboa.
- Tohmo, T. (2018), "The economic impact of tourism in central Finland: A regional input-output study", *Tourism Review*, Vol 73 No 4, pp. 521-547. <https://doi.org/10.1108/TR-04-2017-0080>
- Villanova, R., Leite, C. and Raposo, I. (1994). *Casas de sonhos*, Éditions Créaphis, Paris.
- Walmsley, D. (2003). Rural Tourism: A Case of Lifestyle-Led Opportunities. *Australian Geographer*, 34 (1), pp. 61–72.

- Webb, N. (1999), "Home Across the Atlantic? Views on the Maintenance of the Portuguese Culture in Port Elizabeth, South Africa", *Society in Transition*, Vol 30 No 1, pp. 43-53.
- World Tourism Organization (UNWTO, 2020). Framework Convention on Tourism Ethics.
<https://www.eunwto.org/doi/pdf/10.18111/9789284421695>

Understanding Tourist Experience in Mountain Hotel Accommodation: A Qualitative Assessment of Online Reviews

Mehlika Saraç and Çağatan Taşkın

Bursa Uludağ University, Türkiye

msarac@uludag.edu.tr

ctaskin@uludag.edu.tr

Abstract: This study examines tourist experiences in mountain hotels within Uludağ, Türkiye's premier winter tourism destination, by conducting a qualitative analysis of online reviews on TripAdvisor. In winter tourism, electronic word-of-mouth (eWOM) plays a pivotal role, as guest reviews directly impact booking decisions and overall destination appeal. Findings from this study reveal that food quality, room comfort, and staff interactions are crucial determinants of guest satisfaction, while dissatisfaction often arises from limited menu variety, room cleanliness, and issues in common areas. Unique elements of Uludağ's environment, such as scenic landscapes and winter sports, significantly enhance guest experiences, underscoring the importance of integrating cultural assets into the hospitality offerings. The study highlights the potential of eWOM as a feedback mechanism for mountain hotels to address weaknesses, improve service quality, and better align with customer expectations. These insights suggest that addressing critical areas for improvement and leveraging Uludağ's unique local features could enhance its competitiveness in the winter tourism market, fostering both customer loyalty and regional development.

Keywords: Electronic word-of mouth, Winter tourism, Mountain hotel accommodation, Online review, TripAdvisor

1. Introduction

In recent years, digitalization has greatly enhanced the influence of electronic word-of-mouth (eWOM). Platforms featuring user-generated content have gained significant importance. For instance, a recent survey conducted by Opinion Research Corporation revealed that more than 60% of participants reviewed online ratings, blogs, and customer feedback prior to making a purchase and over 80% of those who consulted this information indicated that it had some impact on their buying decisions (O'Connor, 2010).

In hospitality and tourism, eWOM plays a prominent role in influencing the purchase intentions of customers because some aspects of products are intangible before consumption (Chen & Law, 2016). Tourism and hospitality practitioners also entirely use eWOM to understand their company's current position and to analyse its competitive advantages (Lei and Law, 2015). Online reviews, considered a form of eWOM (Filieri, Alguezaui, & McLeay, 2015), influence customer's booking decisions, loyalty, recommendation intentions, and ultimately affect the performance of service providers (Taecharungroj & Mathayomchan, 2019). Thus, online reviews are an important resource that can benefit a destination by increasing its competitive advantage (Simeon et al., 2017). Although many studies have analysed online reviews in different contexts, there is still a lack of research investigating online reviews for winter tourism accommodation and mountain hotels. Like other resorts, mountain hotels are facing many challenges, such as climate change, insufficient snow, short seasons, and high competition from other destinations. In order to be competitive under these difficult conditions, the quality of customer experience provided by hotels becomes even more important. Studies show that hotels with higher levels of service tend to be open longer throughout the year (Parrilla et al, 2007). Improving service quality by understanding customers and satisfying customer needs leads to an increase in perceived customer value and reputation.

Based on the above explanations, using the online reviews, this study aims to explore tourist's accommodation experience in Mountain Hotels of Uludağ in order to understand their needs, expectations, and satisfaction mechanisms.

Uludağ, an ancient volcanic mountain located near Bursa, Türkiye, is one of the most attractive winter tourism destinations with an impressive peak reaching 2,543 metres. The area boasts over 20 ski slopes and several dedicated ski hotels that provide accommodations. Beyond skiing, visitors can enjoy snowboarding, snowshoeing, winter trekking, and even sledding. Easily accessible from Bursa and Istanbul, Uludağ's ski season typically spans from December to March. Tourists visit majorly from Türkiye, Russia, the Middle East, and Europe. Despite its appeal, Uludağ ski resorts face several issues like environmental impact, overdevelopment, and limited modern facilities in certain areas, poor technology and lack of car making machines. Uludağ's main rivals include Erciyes, Palandöken, and European ski resorts, which offer similar experiences with advanced infrastructure. Analysing TripAdvisor reviews of mountain hotels in Uludağ may support strengthening the

region's competitive advantage due to well understood customer needs and provide insight to hotels about their strengths and potential improvements.

2. Winter Tourism and Mountain Hotel Accommodation

A winter tourism destination can be defined as a geographical, economic and social unit consisting of all those of firms, organisations, activities, areas and installations which are intended to serve the specific needs of winter sports tourists. Destinations can be seen as the tourist product that in certain markets competes with other products (Bieger, 1998). Two major exogenous forces nowadays impact the winter tourism destinations: climate change and growing competition. (Bausch & Gartner, 2020). For Uludağ, climate change is a bigger threat than for destinations that are using technology and snow making machines. An increasing lack of snow availability combined with lack of artificial snow production facilities, leading to earlier end of the winter use period, appears to be a big challenge. A major additional endogenous force is the emergence of new competitors. Over the past decade, new competitors with appealing travel products have entered the market, such as cruises to warm destinations, shopping in Europe and the options for short city trips have also expanded, thanks to low-cost airlines. In addition to vacation choices, consumer preferences in outdoor activities have shifted; many now enjoy these activities year-round, supported by advanced outdoor gear that mitigates weather effects. As a result, many destinations offer early spring packages tailored to bikers, hikers, and runners, providing winter travellers with alternatives beyond skiing (Bausch & Gartner, 2020; Steiger, 2011).

While a winter tourism destination includes core and support activities, the competitiveness of the destination is largely determined by the core service provider: hotels. Since, mountain hotels are transferring created value to customers, they majorly drive the competitiveness of a winter sport destination. (Flagestad and Hope, 2001). However due to the discussed seasonality issues, like other destinations, mountain hotels in Uludağ need tailored marketing, resource management, and service strategies to sustain year-round viability. Studies indicate that hotels providing higher levels of service often maintain longer operational periods throughout the year (Parrilla et al., 2007). For mountain hotels it is a necessity of focusing on enhancing customer experience through a deep understanding of customer expectations and proactively meeting their needs, hotels can significantly increase perceived customer value and build a positive reputation.

However, Mountain hotel accommodation caters to specific traveller expectations, blending convenience, luxury, and an immersive experience with the natural environment. Some studies investigate consumer motivations, showing that winter tourists prioritise activities like skiing, snowboarding, and sightseeing. However, Bausch & Gartner (2020) research identified diverse European Alps customer segments beyond traditional winter sports enthusiasts and suggested that European Alps need new adapted products and activities to different customer segments who are not prioritising winter sports. Gilbert and Hudson (2000) also highlight that winter tourists seek authenticity and connection with nature, driving the growth of eco-friendly practices in mountain hotels.

As seen in literature, the expectations of tourists from a winter tourism destination will vary according to time, context, and culture. Therefore, the value and customer experience offered by both the destination and the mountain hotels, which largely shape the destination, need to be aligned with the context through feedback gathered from customers. From this perspective, it is essential for hotels operating in the Uludağ region, a major winter tourism centre in Türkiye and Europe, to understand customer experience and enhance their products and services based on customer feedback to strengthen the destination's competitiveness. Like other industries, eWOM seems a useful way for Uludağ mountain hotels to proactively improve the guest experience, increase customer satisfaction, and foster brand loyalty.

3. Electronic Word-Of-Mouth (eWOM), Online Reviews and Hotel Industry

Word of mouth (WOM) is a form of personal influence that guides consumers toward or away from specific products, brands, or services based on the information and opinions shared by other consumers (Hawkins, Best, & Coney, 2004). Online reviews are one of the effective forms of WOM (word of mouth). For example, TripAdvisor serves as a popular platform for travellers to access travel information through peer reviews. Studies show that most tourists engage in online communication both during trip planning and while on vacation (Jacobsen & Munar, 2012; Chen & Law, 2016).

The intangible nature of tourism and hospitality products and services increases the perceived uncertainty in the consumer's decision-making process and fosters the consumer's fundamental need for reliable information in their choice decision (Liu & Park, 2015). With the rise of social media platforms that enable the sharing of

travel experiences, online consumer reviews have become increasingly significant for the tourism and hospitality sector. A report by Mintel (2016) highlighted that consumer review websites are now the second most commonly used information source after search engines (such as Google) when travellers are researching a trip (Litvin & Dowling, 2016).

Racherla, Connolly, and Christodoulidou (2013) found that a hotel's overall rating had a weaker connection to the ratings of individual attributes. This suggests that the aggregate numerical rating may not accurately reflect customers' service quality perceptions and satisfaction, as it oversimplifies their nuanced views on different aspects of the hotel experience. This may also explain Ong's (2012) finding that customers prefer to rely on written reviews over simple numerical ratings for a more comprehensive understanding of service quality. Thus service providers have started using online consumer reviews, or eWOM, as marketing tools by encouraging customers to share their personal experiences with others.

Positive product reviews are free advertising for companies and increase business potential; however, undesirable comments can severely destroy the image and reputation of a company. While many studies, including Xie et al. (2011), find negative eWOM more influential on booking intentions, Ong (2012) found that customers often weigh both positive and negative reviews equally (Chen & Law, 2016). Therefore, it is important to consider both negative and positive customer reviews for practitioners and also researchers.

In Tourism and Hospitality, the two areas where eWOM is most studied were travel and hotels. However, these studies mostly attempted to explore: (1) what eWOM is and what is the nature and characteristics of eWOM (Litvin et al., 2008; Black and Kelley, 2009; Cox et al., 2009 ; Ong, 2012). (2) What is the antecedence of eWOM ? (O'Connor, 2010; Browning et al., 2013; Kang and Schuett, 2013; Boo and Kim, 2013; Liu et al., 2013; Pöyry et al., 2013) and (3) What is the impact of eWOM ? (Huang et al.,2010; Zhang et al., 2010; Gil-Or, 2010; Callarisa et al., 2012; Ögüt and Taş, 2012; Hudson and Thal, 2013).

In literature there is a strong evidence about the positive effects of eWOM on predicting hotel performance (Ögüt & Onur Taş, 2012; Ye et al., 2011), customer ratings boost hotel performance and even affect hotel room prices (Nieto, Hernandez-Maestro, & Muñoz Gallego, 2014). However, several studies have found that the influence is context dependent (Yang et al., 2018; Lu, Ye, & Law, 2014) and vary across different research time, geographic setting and hotel class (Blal & Sturman, 2014). Therefore, it is difficult to generalise the outcomes related to eWOM and hotels (Floyd et al., 2014). Even when studies focus on similar empirical contexts, there are conflicting findings about eWOM and outputs (Yang et al., 2018). Thus also there are some studies searching for customer satisfaction and dissatisfaction aspects in hotel context (O'Connor, 2010), searching these aspects for winter tourism and mountain hotels will also provide valuable information for practitioners and academics. This study is not interested in exploring who posted the online reviews, or what the effect of online reviews is on customer behaviour. But this study is concerned with the in-depth content of reviews themselves and what tips they can give to hotel managers to improve their quality, reputation and customer satisfaction. Above all, what these reviews can tell to all stakeholders involved in Uludağ destination to overcome current challenges.

4. Methodology

Since qualitative research allows for an in-depth understanding of the experiences, beliefs, and attitudes of individuals, providing rich and contextual insights into their perspectives (Creswell, 2013), this study adopts a qualitative research approach to explore tourist's accommodation experiences in Mountain Hotels of Uludağ in order to understand their needs, expectations, and satisfaction mechanisms.

We collected the qualitative data from TripAdvisor.com, the largest online network of travel consumers. "Founded in 2000, TripAdvisor offers a platform where users from around the world can share or read about personal travel experiences. According to its website, it claims to be the largest travel site globally, boasting more than 100 million genuine reviews, opinions, and photos related to hotels, restaurants, and tourist sites."

Our research data set consists of the positive and negative trip advisor reviews written by guests who have experienced one of the 12 selected mountain hotels in Uludağ winter tourism destination from January 2023 to August 2024. The number of sufficient reviews available on trip advisors was decisive in the selection of hotels in the destination. This is because some hotels have very few or no reviews. Although in literature there is evidence that the 5 most recent reviews are enough to have a general idea (O'Connor, 2020; Gretzel et al., 2007), we have collected all reviews on trip advisor web sites written for each hotel (769 in total) in depth.

A significant challenge faced by social networking sites, including TripAdvisor, is the fake reviews. There are suspicions that some reviews may be posted by hotels to undermine their competitors' ratings or by the hotels

themselves to boost their scores and push down negative feedback (O'Connor, 2010). Typically, genuine reviewers leave comments only once. In our dataset, if a user writes multiple reviews—whether positive or negative—for the same hotel, we classify these as suspicious and exclude them from our analysis.

In total, 769 online reviews gathered from 12 hotels were analysed by MAXQDA. The frequency of certain words was first analysed through content analysis. Then, through a thematic analysis, the data were systematically organised and coded to identify key themes and patterns. Themes emerged from review text, allowing insights into guest satisfaction and dissatisfaction regarding their accommodation experience. The analysis followed three steps: (1) Initial codes were created and codes assigned to each paragraph (2) Codes were grouped into broader themes and sub-themes based on their relevance and similarities (3) Finally, the themes were analysed and interpreted to uncover deeper insights, exploring connections and patterns within the data to present a comprehensive understanding of guests experiences.

To ensure the trustworthiness and credibility of the study, two coders followed the procedure suggested by Miles and Huberman (1994). Discussing and evaluating reviews with fellow researchers in the data analysis process, minimise bias and enhance the reliability of the findings (Haynes, 2012). A summary of the findings is presented below.

5. Findings

The characteristics of the 12 hotels from which the trip advisor data for this study were obtained are given in Table 1 below. Hotels included in the study are most highly rated with four-star and five-star hotels. The Average TripAdvisor rating of hotels are between minimum score of 3.5 and maximum score of 5, not always show positive relation with the hotel's star rating as seen in figure.1.

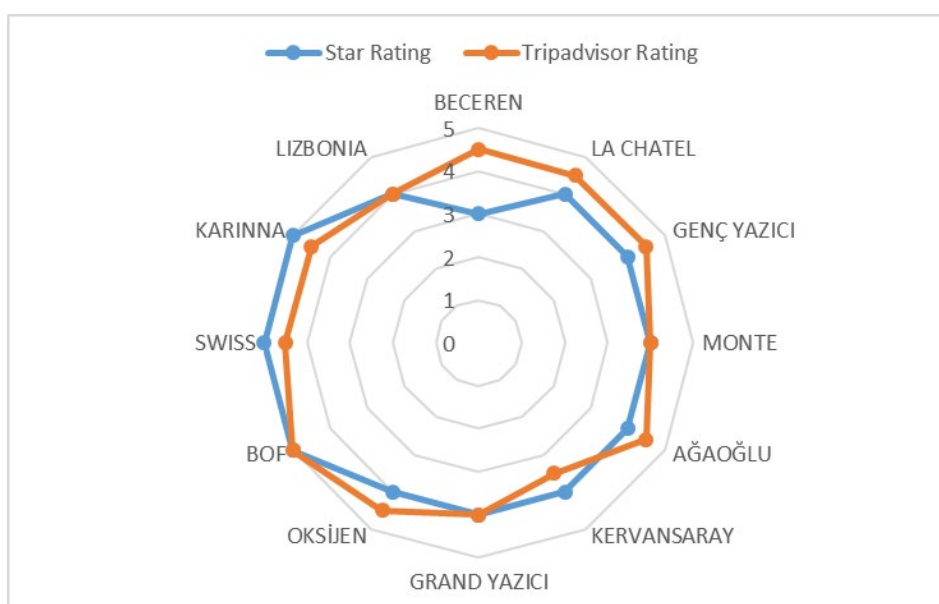


Figure 1: Hotel's Star Ratings and Trip Advisor Ratings

As seen in Table 1, the hotel's room capacity ranged from 20 to 235. A total of 769 reviews were obtained by filtering 2023 and 2024 reviews from 4832 reviews in total. The reviews collected from each hotel ranged from 5 to 308. 1877 codes were created as a result of the assessment of reviews.

Table 1: Hotel Characteristics

Hotels		Average Trip Advisor Rating	Star Rating	Number of Room	Zone	Number of Reviews
BECEREN		4,5	3	-	1.Zone	17
LA CHATEL YAZICI		4,5	4	20	1.Zone	5
GENÇ YAZICI		4,5	4	47	1.Zone	127

MONTEBAIA ULUDAĞ		4	4	164	2.Zone	27
AĞAOĞLUMY MOUNTAIN ULUDAĞ		4,5	4	197	2.Zone	6
KERVANSARAY		3,5	4	??	1.Zone	13
GRAND YAZICI		4	4	235	1.Zone	12
OKSİJENZONE HOTEL		4,5	4		1.Zone	308
BOFHOTELS ULUDAĞ SKI & LUXURY RESORT		5	5	167	2.Zone	122
SWISSHOTEL ULUDAG		4,5	5	-	Kirazlı	16
KARINNA HOTEL		4,5	5	-	2.Zone	96
LIZBONIA HOTEL		4	4	60	1.Zone	20
TOTAL						769

The word frequency analysis (refer to Table 2) reveals the top 40 topics frequently mentioned in guest reviews. In the mountain hotel setting, food stands out as particularly significant, ranking as the fourth most frequently cited word across all reviews. Excluding verbs and pronouns, other commonly mentioned topics include staff, skiing, room, location, friendliness, and cleanliness, as shown in Table 2.

Table 2: Frequency of Words in Reviews

Word	Freq.	Word	Freq.	Word	Freq.	Word	Freq.
1.Hotel	4317	11. Accommodation	635	21. Family	339	31.Sahlep (traditional drink)	167
2.Valuable	1932	12. Holiday	632	22. Experience	264	32. Happiness	166
3.Thanks	1709	13. Guests	616	23. Children	255	33. Manager	158
4.Food	1219	14. Clean	611	24. Helpful	237	34. People	156
5.Staff	1185	15. Location	530	25. Quality	235	35. Coffee	141
6.Satisfy	1068	16. Services	526	26. Breakfast	226	36. Comfortable	136
7.Skiing	983	17. Motivation	526	27. Restaurant	215	37. Massage	136
8.Room	878	18. Advice	488	28. Slope	210	38.Snow	127
9. Friendly	738	19. Spa	453	29. Tea	176	39.Welcome	127
10. Uludağ	640	20. Delicious	396	30. Time	168	40.Equipment	117

The process of thematic analysis of guest reviews revealed several main themes that include their dissatisfaction on Food, Common Areas, Room, Staff, Price, Customer Relation, SPA, Skiing, Location. Table 3 shows all derived themes and frequencies. As can be seen below, 85.7 % (1630) of the Trip advisor reviews are positive and 14.3 % (247) are negative.

Table 3: Most Common Themes by Trip Advisor Positive and Negative Reviews

Negative Reviews (% 14.3)			Positive Reviews(% 85.7)		
Themes	Frequency (Not Satisfied)	Percentage (Not Satisfied)	Themes	Frequency Satisfied)	Percentage (Satisfied)
Food	61	%24.7	Staff	398	%24.42
Common Areas (Lobby/Café,Teras)	53	%21.8	Food	307	%18.83
Rooms	46	%18.6	Cleaning	169	%10.37
Staff	35	%14.1	Entertainment	124	%7.61

Negative Reviews (% 14.3)			Positive Reviews(% 85.7)		
Themes	Frequency (Not Satisfied)	Percentage (Not Satisfied)	Themes	Frequency Satisfied)	Percentage (Satisfied)
Price	19	%7.6	Family Hotel	103	%6.32
Customer Relation	17	%6.8	Location	99	%6.07
SPA	12	%4.8	Comfort	96	%5.89
Skiing	2	%0.8	Landscape	83	%5.09
Location	1	%0.4	Skiing	59	%3.62
Total	246	100	Rooms	50	%3.07
			SPA	35	%2.15
			Heating	25	%1.53
			Common Areas(Lobby, Café,terras)	22	%1.35
			Price	18	%1.10
			Customer Relation	19	%1.20
			Animal Friendly	6	%0.37
			New Hotel	6	%0.37
			Traditional	5	%0.31
			Alcohol Free	4	%0.25
			4 Season	2	%0.12
			TOPLAM	1630	100

The issues that customers are satisfied with are grouped under the similar headings of Staff, Food, Skiing, Room, SPA, Common Areas, Price, Customer Relation. Table 3 also mentioned that customers are also satisfied in terms of Cleaning, Entertainment, Family Hotel, Comfort, Landscape.

To understand negative feedback in more detail, the following hierarchical code chart summarises the 3 main themes of trip advisor reviews with negative content and the most repeated comments under the sub themes. As seen in figure 2, the most repeated negative comments about food were inadequate beverages, little variety of food and poor quality of foods. Cleaning problems, disturbing noise and poor ski slope were mentioned in the reviews under the heading of common areas as the second most important issue. Poor cleaning, old/neglected rooms, heating/cooling problems were mostly mentioned in the reviews regarding rooms.

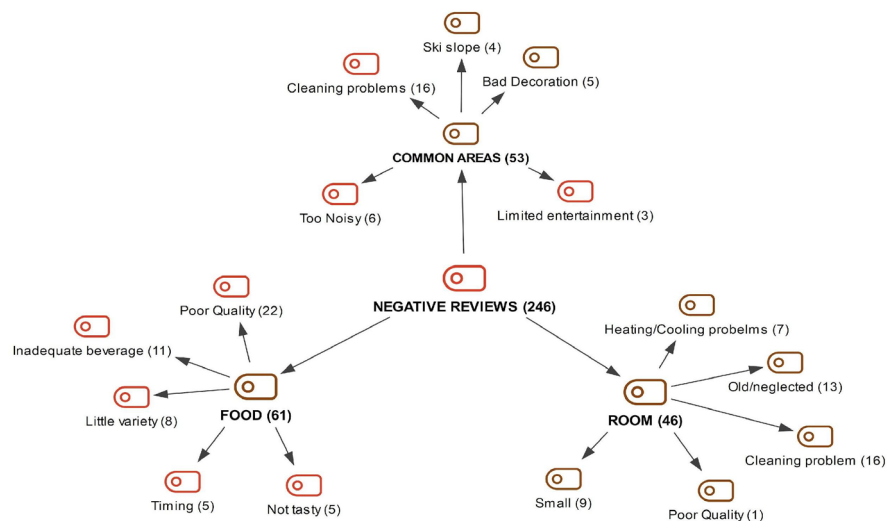


Figure 2: Hierarchical Code for Negative Customer Comments

6. Discussion and Conclusion

Based on the results from the qualitative analysis of online reviews, this study provides significant insights into the experiences of tourists staying in mountain hotels in Uludağ. First of all, when the trip advisor ratings of the hotels included in the analysis are examined, it is seen that almost all of them have a rating of 4 and above. This gives us the image of a strong destination with high customer satisfaction. In detail, the findings indicate that food, room quality, and staff interactions are primary determinants of guest satisfaction and dissatisfaction. It is noteworthy that food, room and staff had the highest frequency of both negative and positive comments. Although this may seem like a contradiction, it draws attention to an important issue that in a mountain hotel concept, the most important criteria that customers are most interested in are the food, the room and the attitude of the staff. Although the prominence of these themes aligns with previous literature on hotel experience (O'Connor, 2010) there are still context-specific differences. For example, according to word frequencies our findings revealed that food is the most repeated issue in the mountain hotel concept, whereas in the O'Connor (2010) study, food is the issue after room and staff. This is also interesting that some local foods and beverages (for example "sahlep" which is a traditional beverage with milk generally drunk in winter) repeatedly mentioned in reviews for its good taste and impressed visitors. This may give us an idea that local foods and beverages can create a competitive advantage in mountain hotels.

The positive reviews indicate that guests highly value staff attentiveness, room comfort, and quality dining experiences. The high satisfaction ratings in these areas suggest that mountain hotels in Uludağ are meeting fundamental guest expectations, contributing to positive perceptions and encouraging brand loyalty. These findings underscore the importance of focusing on human resources and training initiatives that enhance staff-customer interactions, as well as culinary quality and room maintenance to consistently meet high service standards.

However, the data also reveals notable areas of dissatisfaction, particularly concerning food variety and quality, room cleanliness, and issues in common areas such as lobby and cafe spaces. These areas of concern reflect opportunities for improvement that could strengthen the overall appeal of the region. In fact, it is thought that some of the problems related to cleanliness are related to the infrastructure problems of the region. In particular, investing in menu diversification, enhanced cleanliness protocols, and regular maintenance of shared spaces could directly address common complaints and contribute to an enriched guest experience.

The study's thematic analysis reveals that beyond core offerings, unique elements of the Uludağ mountain environment—such as the scenic landscape and winter sports facilities—still play a significant role in guest experiences, as evidenced by frequent positive mentions of skiing and views. Although there is interest in massages and spa activities, these are not priorities, but rather side activities that complement the skiing activity.

The fact that almost no environmental and sustainability issues are mentioned in customer comments attracts attention. This finding is not aligned with global trends in tourism, where authenticity and environmental sustainability are increasingly valued by travellers (Gilbert & Hudson, 2000). This situation actually draws attention to the differentiating effect of context and culture on customer expectations.

In conclusion, the findings from this study offer actionable insights for hotel managers in Uludağ and similar winter tourism destinations. By addressing areas of dissatisfaction and leveraging unique cultural aspects, mountain hotels can enhance the customer experience and foster loyalty. However, this research has some limitations. The fact that the customer reviews about the hotels are obtained only from trip advisor can be considered as a limitation that reduces the reliability of the research. More reliable analysis results can be obtained with multidimensional data to be obtained from different review platforms or social media. For future research, a quantitative analysis of guest satisfaction metrics across different accommodation types and a longitudinal study observing trends in guest expectations over time would be beneficial. Furthermore, investigating the impact of specific eco-friendly practices on guest satisfaction in mountain hotels could provide valuable insights for sustainable tourism development in the Uludağ region.

Acknowledgement

This study is supported by REMODEL project which is funded by the European Union's Horizon Europe research and innovation programme under grant agreement No 101079203. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.

References

- Bieger, T., 1998. Reengineering destination marketing organisations: The case of Switzerland. *The Tourist Review*, 53(3), pp.4-17.
- Chen, Y.F. and Law, R., 2016. A review of research on electronic word-of-mouth in hospitality and tourism management. *International Journal of Hospitality & Tourism Administration*, 17(4), pp.347-372.
- Haynes, K., 2012. Reflexivity in Qualitative Research, in: Qualitative Organizational Research. SAGE, Oxford, pp. 72–92.
- Yang, Y., Park, S. and Hu, X., 2018. Electronic word of mouth and hotel performance: A meta-analysis. *Tourism management*, 67, pp.248-260.
- Pourabedin, Z. and Migin, M.W., 2015. Hotel experience and positive electronic word of mouth (e-WOM). *International Business Management*, 9(4), pp.596-600.
- Leong, L.Y., Hew, T.S., Ooi, K.B. and Lin, B., 2019. Do electronic word-of-mouth and elaboration likelihood model influence hotel booking?. *Journal of Computer Information Systems*, 59(2), pp.146-160.
- Liu, F., Lai, K.H., Wu, J. and Luo, X., 2022. How electronic word of mouth matters in peer-to-peer accommodation: the role of price and responsiveness. *International Journal of Electronic Commerce*, 26(2), pp.174-199.
- Goh, S.K., Ho, V.T. and Jiang, N., 2015. The effect of electronic word of mouth on intention to book accommodation via online peer-to-peer platform: Investigation of theory of planned behaviour. *The Journal of Internet Banking and Commerce* 5, 2, pp.2-7.
- Sijoria, C., Mukherjee, S. and Datta, B., 2019. Impact of the antecedents of electronic word of mouth on consumer based brand equity: a study on the hotel industry. *Journal of Hospitality Marketing & Management*, 28(1), pp.1-27.
- O'connor, P. (2010). Managing a hotel's image on TripAdvisor. *Journal of hospitality marketing & management*, 19(7), 754-772.
- Miles, M., & Huberman, M. (1994). Qualitative data analysis. Thousand Oaks, CA: Sage.
- Mintel. (2016). Holiday planning and booking process. London: Mintel.
- Steiger, R. (2011). The impact of snow scarcity on ski tourism: An analysis of the record warm season 2006/2007 in Tyrol (Austria). *Tourism Review*, 66(3), 4–13. <https://doi.org/10.1108/16605371111175285>.

Revenue Assessment of the Current Tourism Industry of Bandarban Hill District, Bangladesh, and its Economic Impact on the Local Indigenous Community

Shaing Shaing U

Department of Business Administration, Bandarban University, Bangladesh

shaing_nin@yahoo.com

Abstract: The tourism industry has been acknowledged as a contributor to destination economies in many countries. The tourism industry of Bandarban Hill District is a flourishing sector. The majority of people are heavily dependent on Jhum-based agriculture. Further, there is no emerging sector that can create new workplaces or factories overnight. As the geographical location, culture, people & society, and political scenarios of this area are different from most country districts, special observation and planning are needed to improve its economic situation. As the tourism industry of this area blooms automatically, the industry can be turned into a productive sector. So the people of this area can have more options for jobs. As a result, people will experience work diversity and social benefits in the long run. The research project aims to study the amount of revenue generated by this industry and identify its beneficiaries, their positions in the tourism industry, and the status of supply chain management. The study revealed that the district annually generated a large amount of revenue just after post covid. Comparing this amount to the research done 9 years ago, the revenue has increased almost 4 times. Among the 7 upazilas, Bandarban Sadar, Thanchi, and Rowangchari are holding first, second, and third positions respectively in terms of the amount of revenue. Most of the frontiers of this industry are elite class and many of them are outsiders. Locals are running mid to small-sized businesses and the amount of revenue generated by them is not greater. Although this industry is creating job opportunities for locals, the contribution could be doubled or increased if the industry is managed and promoted systematically by proper authority. Community empowerment is possible by bridging the gaps in the supply chain by spreading the benefits and advantages of this important industry among the common people. In addition, Bangladesh has set the Sustainable Development Goals-SDGs target by 2030, where Bandarban can become a model through the implementation of the proposed institutional framework.

Keywords: SDG 2030, Community tourism, Supply chain gap

1. Introduction

The tourism industry has been playing a remarkable role all around the globe in making the economy grow within a short period. Tourists visit destinations because of their unique features including nature, culture, architecture, gastronomy, infrastructure, landscape, events and shopping, etc. All together, they are critical parts of the destinations and have a profound effect on their success (Science Daily, 2019). Bandarban is undoubtedly a haven with an abundance of natural beauty, cultural diversity, gastronomy, and landscaping. It consists of 11 indigenous communities, including the Marma, the Chakma, the Tripura, the Tanchangya, the Mro, the Khumi, the Bawm, the Lusai, the Chak, the Khaying, and the Pankhua. The indigenous people have different languages and cultures living in these districts. Each community has rules, regulations, norms, social culture, heritage, and beliefs that have enriched the culture of Bangladesh to a greater extent. Bandarban has the highest mountain peak in the country, known as Tazingdong, followed by Kewcaradong and Chimbuk. Bandarban is abundant with natural wonders of water bodies like Boga Lake and Prantik Lake. There are also some artificial recreational spots such as Rijuk Tour Complex, Meghla, Nilachal, Nilgirri, and the very heavenly beauty of Mirinza zig-zag way. Two of the major waterways of Bandarban are the Sangu River and the Matamuhuri River. (Bandarban Hill District Council, 2022).

However, due to many geographical, economic, and political reasons, the region's many places remained relatively isolated and underdeveloped for a significant period. The educational ratio, financial abilities, and ability to access information, institutions, administrations, social networks, securities, socialization, and communication are still far below that of mainstream people or the national average. These people are victims of a poverty trap as their society suffers from a high degree of inequality (United Nations Global Marketplace, 2019). However, now the place is flourishing in the tourism industry. Inland tourists in Bangladesh have been making their way to Bandarban for almost a decade. Bangladesh's government has declared Bandarban a tourist zone (Bandarban Hill District Council, 2022) Since then, government officers, including the district and Upazila administration, Zilla Parishad, Upazila Parishad, Bangladesh Army, and BGB, have been working with the general entrepreneurs to provide tourist services. Some significant spots have been created and managed by different sectors of government departments. The number of incoming tourists in Bandarban has increased over time and

being. Therefore, revenue generated by this sector must have increased as well. Currently, the Bangladesh Government has handed the management of the Bandarban tourism industry to the Bandarban Hill District Council (BHDC). This industry has started to emerge as one of the significant revenue generators for Bandarban the threats, challenges, and shortcomings that arise require proper management for the sake of the general people and the sustainable growth of this industry. Otherwise, the challenges will become major threats to its people and the environment.

The research project aims to study the amount of revenue generated by this industry. Also, to develop a framework to advocate and help implement tourism activities in a collaborative manner that will strengthen the economy in line with creating entrepreneurship among local youths, women, and Indigenous people. Therefore, this research sets the following objectives to accomplish the project.

2. Research Objectives

- To explore the context and current economic status of tourism development and management in Bandarban Hill District
- To identify direct and indirect stakeholders as well as how revenue-generating from the tourism industry in Bandarban Hill District
- To identify the gap in supply chain management and help to develop an impactful model and strategic framework for the better benefit of the local community

To fulfill the research objectives, this study aims to assess the annual revenue generated by the tourism industry and its effects on the local community in the Bandarban Hill District. An economic assessment will be conducted through engagement with local stakeholders and service providers to understand the sources of revenue. Ultimately, the research seeks to develop a strategic framework to help policymakers guide and enhance the benefits of tourism for local populations.

Theoretical Framework and Literature Review: Tourism is a multifaceted phenomenon that encompasses economic, socio-cultural, and environmental dimensions (Barcelona Field Study Centre, 2025). In the context of Bandarban, a distinctive region in Bangladesh, a nuanced understanding of tourism revenue dynamics and their impacts on local indigenous communities is essential. This theoretical framework aims to guide the assessment of tourism revenue and its implications, synthesizing relevant literature and theoretical models.

Bandarban, designated by the Bangladesh Government as a key tourist destination, is often referred to as the "Roof of Bangladesh" due to its breathtaking mountainous landscape. The district comprises seven Upazilas: Bandarban Sadar, Rowangchhari, Ruma, Thanchi, Alikodom, Lama, and Naikhongchhari (DC Bandarban, 2022, 2024). It attracts a significant influx of domestic tourists, particularly from October to March, during the peak season. In contrast, the off-season from April to September sees a decrease of 30%-40% in visitor numbers (Ministry of CHT Affairs, 2022).

Traditionally, the economy has relied on agriculture, including jhum cultivation. While tourism offers a promising supplemental income, reliable data on revenue generation is scarce, complicating assessments of its economic impact (Ministry of Finance, 2024). The Bangladesh Poverty Map indicates that over 50% of Bandarban's population lives below the upper poverty line (The Bangladesh Bureau of Statistics (BBS), 2022) which raises questions about the effectiveness of tourism in alleviating poverty. The agenda set by the Bangladesh Government aligns with the Sustainable Development Goals (SDGs), emphasizing public participation in achieving targets by 2030 (UN Bangladesh 2022, 2022). A well-structured tourism plan could contribute to these goals, potentially fostering economic prosperity and social cohesion.

Economic Contributions of Tourism: Tourism is frequently recognized for its potential to generate substantial revenue and employment opportunities, thereby contributing significantly to local economies. The global tourism industry accounted for 10.5% of the global GDP in 2019 (World Travel Tourism Council, 2024). This economic perspective aligns with the Multiplier Effect theory, which asserts that initial tourist spending circulates within the local economy, fostering additional economic activity (Lange, 1943). This framework will be employed to evaluate how tourism expenditures translate into tangible economic benefits for the local community in Bandarban.

Socio-Cultural Impacts: Tourism greatly influences social structures and cultural practices within host communities. The Social Exchange Theory refers to the interactions between tourists and local populations yield both positive and negative outcomes, impacting community dynamics (Rafael Robina-Ramírez, 2022). As the tourism industry expands, it begins to influence the culture and lifestyle of the local people in that region. In the

Bandarban Hill District, indigenous and Bengalis, regardless of their background, have largely been living together in a peaceful coexistence, although there have been some exceptions in certain cases. For example, with the development of the tourism industry in Thailand, there have been some changes in its religious culture due to the influx of tourists. To accommodate tourists, Buddhist temples now offer packaged religious ceremonies, sell souvenirs in temples, and sell tickets for taking photos at certain religious sites, which was never the case before. Such practices have emerged alongside the growth of tourism, marking a new trend.

Tourism and Sustainability: Sustainable tourism management and sustainability are intrinsically linked. Through sustainable management in tourism, the natural, economic, and social environments of the area will be preserved equally. Along with sustainable tourism management, the balance of nature will be maintained, and at the same time, the economic and social security and growth of the area will be enhanced. In the context of the SDGs, this is specifically addressed in SDG 12 and SDG 8.

Research Methodology: This research adopts both quantitative and qualitative methods. All stakeholders from the tourist points across the seven upazilas of Bandarban Hill District participated in the study as participants from April 15 to 15 July 2022. The participants included business owners, managers, employees, community members, and staff. A semi-structured questionnaire was used in the survey, and in some cases, the observational method was applied. In total, 535 participants were involved in this study, including 100 tourists from Bandarban Hill District.

Community consultation meetings were held at two well-known community tourist spots, one at Munlai Para in Ruma Upazila and the other at Debota Khum Tourist Spot in Rangchhari Upazila. These meetings were primarily conducted to understand the overall state and development of community-based tourism in the area.

Limitations & Ethical Considerations: This study had some limitations in terms of data collection. Specifically, due to the lack of prior research activities related to revenue, the data collection process had to rely entirely on verbal responses. However, the general people were straightforward and naturally provided answers to the survey questions regarding their income and issues. Ethical considerations were also addressed seriously for the safety purposes of the participants. While the local people had given consent to disclose information about their income without objection, for the sake of security and sensitivity, no names were mentioned in the study. For government institutions, much of the data had to be accepted based on verbal trust, as they were not comfortable presenting official documents. Every effort had been made to accurately assess the financial earnings, spending time and engaging in sincere conversations in a calm and respectful environment. There were no unethical practices involved in this research.

3. Findings

3.1 Case study 1 Bandarban Sadar Upazila

Bandarban Sadar has significant artificial and natural tourist spots and facilities around the central business district area. It has abundant natural and artificial tourist spots such as Nilachal, Nilgiri, Meghla Parjatan Kendra, Shoilopropat, and Upobon Lake. Apart from this, Beside the Sangu river, one of the main rivers of Bandarban. It enters Bangladesh through Bandarban. It flows from east to west across Bandarban falling into the Bay of Bengal at the end of 270 km. The Riverside and waterways around the city are still underdeveloped compared to the rest of the town, which is a setback to the economic development of Bandarban.

From the Bandarban Sadar riverway to Rowangchhari, Thanchi and Ruma are reachable by boat. Apart from a few exceptions, people use fewer waterways from Bandarban Sadar to Ruma to Thanchi. Bandarban Sadar Upazila has 52 residential hotels listed under Hotel & Restaurant Malik Somity. However, there are a few unregistered restaurants that are running businesses.

According to Md. Fakrul Islam lineman and Abul Kasem, Chairman, Microbus, Jeep, and Peak up Malik Somity Ltd; Bandarban Sadar Upazila has a total of 400 vehicles: 350 Mahindra bolero and 50 jeeps. The transport from Bandarban Sadar travels for a roundabout trip to Nilgiri, Nilachal, Sornomondir, Debotakhum, and Thanchi. Four hundred registered drivers are working in this sector. Among them, 250 drivers from mainstream communities and 150 indigenous.

Table 1: Total Annual Revenue generated in Sadar Bandarban by different sectors

SI Number	Name of the sector	Minimum revenue in BDT	Maximum revenue in BDT
1	Residential Hotels and Restaurants	611,748,000	744,372,000
2	Mahindra, Bolero	345,600,000	401,400,000
3	Riverway boating	4,590,000	5,400,000
4	Taxi, CNG	6,750,000	27,000,000
5	Handicrafts and other sectors	13,500,000	319,800,000
6	Restaurants and food shops	117,720,000	149,976,000
7	Total received from tourist spots	1,099,908,000	1,647,948,000

The researchers in the Bandarban Sadar area, reveal that Bandarban Sadar is one of the leading sources of revenue from the tourism sector in Bandarban. Bandarban Sadar earns a minimum of 1,099,908,000 BDT to a maximum of 1,647,948,000 BDT per annum from the tourism industry. In conclusion, it can be said that the tourism industry of Bandarban Sadar Upazila generates nearly 1.65 billion BDT per annum,

3.2 Case Study 2 Thanchi Upazila

Thanchi Upazila is the second-largest and one of the most popular tourist destinations. Some of the major attractions in this area include Rimaakre, Tindu Nafakhum, Boro Modok, Choto Modok, and Amiakhum. On average, this upazila generates income ranging from 434,500 BDT to 590,600 BDT daily. Hotels, restaurants, handicraft shops, and general shopkeepers make total sales ranging from 119,520,000 BDT to 155,268,000 BDT.

In Thanchi Upazila, water-based transportation plays a significant role. Due to water-based tourism, annual earnings in this sector range from 850,500,000 BDT to 891,000,000 BDT. Vehicles such as Mahindra Bolero and Jeeps generate income ranging from 115,200,000 BDT to 129,600,000 BDT. Additionally, tourist guides earn from 47,750,000 BDT to 117,000,000 BDT.

Table 2: The total sector-wise yearly revenue generated by the Thanchi Tourism Industry

SI No	Description	Yearly income Minimum	Yearly income Maximum
1	Hotels, restaurants, resorts, small handicrafts, varieties shop	119,520,000	155,268,000
2	Transportation	115,200,000	129,600,000
3	Boat	850,500,000	891,000,000
4	Tourist guide	87,750,000	117,000,000
5	Seasonal floating shops at Remakri-Tindu	25,200,000	63,000,000
	Total Minimum to Maximum	1,198,170,000	1,355,868,000

3.3 Case Study 3 Rowangchhari Upazila

Rangchhari is a sub-district of the Bandarban Hill District in Bangladesh, located right next to Bandarban Sadar. It covers an area of 43.43 square kilometers and has a population of around 23,000. Some of the main tourist attractions in the area include Devata Khun, Kachhp Cholisheel Bandha Waterfall, Shilpi Hill, and Telap Sitar Waterfall. The region is particularly famous for Debata Khum. Notably, the area generates a significant income from tourism, especially through its restaurants. Apart from the restaurant industry, the transportation sector

also contributes significantly to the local economy., there are 92 registered tourist guides in Rowangchhari, who are registered with the local upazila administration. Since the Debota Khum is associated with water-based tourism, there is a type of boat kind available here, known as a "Vela." A Vela is essentially a floating flatboat made of bamboo.

Accumulating all the sectors earning the upazila earning statement is given below:

Table 3: The total sector-wise yearly revenue generated by the Rowangchhari Tourism Industry

SI No	Description	Yearly income Minimum	Yearly income Maximum
1	Hotels, restaurants, resorts, small handicrafts, varieties shop	28,044,000	41,454,000
2	Transportation Taxi, bus, motorbikes	39,600,000	45,936,000
3	Boat &Vella	14,850,000	16,200,000
4	Tourist guide	87,750,000	117,000,000
	Total Minimum to Maximum	170,244,000	220,590,000

3.4 Case Study 4-Ruma Upazila-Findings

Ruma Upazila's tourism industry has been making a significant contribution to the local economy ranking 4th in position. The hotel, restaurant, car rental businesses, boat owners, and operators are directly involved in this sector. Among them, Hotel Amirabad is one of the prominent ones. However, the owner has stated that during times with fewer tourists, it becomes challenging to cover the operational costs of running the hotel, especially since it is a large establishment and the costs are higher. To visit Ruma, travelers usually need both a vehicle and a boat. There are 64 registered Jeep available in the area. The jeep owners' association has reported that they collectively earn between 180,000 to 230,000 BDT, which amounts to an annual income of 45,505,000 BDT to 60,960,000 BDT at most. In addition to the jeep, boat owners and their crews also earn a significant amount. Their annual income ranges from 5,202,000 BDT to 7,956,000 BDT. Tourist guides, who play an important role in the services provided, also earn a notable income, with their annual earnings. As the number of tourists coming to the area has grown, the region has become busier. Based on the gathered information, it is analyzed that the total annual income of the area ranges from 134,691,000 BDT to a maximum of 237,820,800 BDT.

Table 4: The yearly total revenue generated by Ruma Upazilaly

Description	Annual Lowest income	Annual Highest income
Hotels, restaurants, resorts, small handicrafts, varieties shop	51,912,000	69,544,800
Transportation	45,505,000	60,960,000
Boat	5,202,000	7,956,000
Tourist guide	36,072,000	99,360,000
Total Revenue	138,691,000	237,820,800

3.5 Case Study 5 Alikodom Upazila

Alikodom is one of the naturally enriched Upazilas in Bandarban. Many tourists travel to Alikodom through Thanchi Upazila, Alikodom Upazila is beside Thanchi. There are not many tourist spots in Alikodom. Tourists traveling through Thanchi tend to visit Alikodom Upazila. Tourists visit mainly waterfalls, as Alikodom has a significant number of waterfalls. They are most active during the rainy season, including Alir Guha (Ali's Cave), Damtua, Bang Jhiril, Wangpa, waterfalls, Rupmuhuri, Tinum, Palong khyaing, Tamung Jhiri, Bali jhiri, Shilbunia Jhorna, and Nona Jhiri Jorna.

Alikom has 25 hotels and restaurants actively serving tourists year-round. Alikodom has 100 Tom Tom (Electric Rickshaw), and each Tom Tom earns about 500 to 700 BDT in a day, which would make the peak season maximum (700X30daysX3)= 63,000 BDT each peak season and the minimum (500X30 days X3)=45,000 BDT per off-season. Apart from TomTom, travelers use bike services as a regular mode of travel. Alikodom has 100 rental bikes; each motorbike earns 700 to 800 BDT daily. Alikodom experiences tourists most for three months during the monsoon when waters and creeks become full of water. Below are the details of earnings from various sectors:

Table 5: Summary of the total sector-wise yearly revenue generated by the Alikodom Tourism Industry

SI No	Description	Yearly income Minimum	Yearly income Maximum
1	Hotels, restaurants, resorts, small handicrafts, Varieties shop	64,215,000	77,580,000
2	Transportation	6,363,000	6,345,000
3	Tourist guide	Not significant	1,800,000
	Total Minimum to Maximum	70,578,000	85,725,000

To conclude, the Alikodom tourism industry is generating a minimum of 70,578,00 BDT and a maximum of 85,725,000 which is not significant compared to Bandarban Sadar but is better off than most.

3.6 Case Study 6 Lama Upazila

Lama Upazila has an area of 61.84 sq km, the river area is 8.173 sq km, the reserved forest area is 332.628 sq km, and the area under cultivable land is 260.845 sq km. Lama is called Aranyarani and is full of natural beauty. Lama ranked 6th in position and doesn't have significant tourist spots or activities compared to the other Upazilas. Upazila administration office mentioned a few tourist spots on their website, including Mirinza Tourist Spot and Quantum Schools name (Lama, Bandarban. govt,2022). However, research shows that most tourist goes to visit the Mirinza Tourist Spot. A small number of people visit the Quantum School for specific purposes but not for recreational reasons.

Lama has 150 jeeps. However, the maximum time average of 60 to 70 jeeps is active. The Secretary, Zafar Ahmed, Lama-Alikodom Jeep Malik Somity, has confirmed that not many tourists visit Lama. Among the 60 to 70 Jeeps during the peak season, and maximum of 10 jeeps go to Thanchi. According to the source, the transportation business of Lama remains the same as ten years before. The number of jeeps over the one decade remained the same.

Table 6: Total income of Lama from the tourism industry

Entity	Maximum	Minimum
Food and shops	648,000	1,080,000
Transportation	3,600,000	14,400,000
Total annual income	4,248,000	15,480,000

3.7 Case Study 7 Naikhongchhari Upazila

Naikhongchhari Upazila covers an area of 463.61 sq km, located between 21°11' and 21°40' north latitudes and between 92°06' and 92°23' east longitudes. Naikhongchhari Upazila has a few tourist spots: a crocodile farm, a gayal farm, and tea gardens. Tourists are allowed to visit without any fees. Further, no notable tourists travel to these spots. Besides, there is a tourist spot: Upabon Parjaton Kendra, managed by the Upazila Administration. An artificial location, Durbin Soilochura is in Sonaichhari Union, to which a few tourists travel daily. Durbin Shoilochura makes about 500 to 1,000 tourists during peak season per day. This upazila stands the least in the position.

According to the assistant of UNO, Naikhoyongahhari, Upaban Pajaton Kendra receives a minimum of 200 tourists per day during peak season. The authority charges a 30 taka entry fee that adds up to (200X30)6,000 BDT daily and (250X30)7,500 BDT minimum during peak season. On the other hand, 50 to 60 tourists visit the spot accumulating 50x30=1,500 BDT to 60X 30=1,800 BDT daily. The place provides small boat rides for tourists and charges 10 BDT per person. There are only 5 to 6 boats used daily. Four people can be accommodated in one boat. Per day minimum of 4X5X10=200 BDT and a maximum of 4X6X10=240 BDT during the off-season and the peak season, tourists increase almost three times from 600 BDT to 800 BDT. There are also watch-tower facilities at the spot. During the peak season, 500 BDT to 1,000 BDT, and during the off-season, 200 BDT to 300 BDT daily is earned.

Table 7: Yearly income received from tourist spots and surrounding shops

In conclusion, Naikhongchhari Upazila receives a minimum of 16,350,000 BDT and a maximum of 20,275,200 per year from surrounding restaurants and hotels.

Season	Minimum in BDT		Maximum in BDT	
Peak season	67,100X30 days X6 months	12,078,000	77,300X30 days X6 months	13,914,000
Off-season	23,900X30 days X6 months	4,302,000	35340X30 days X 6 months	6,361,200
Total Minimum in BDT		16,350,000	Total Maximum in BDT	20,275,200

The table below shows the total amount of revenue generated by the tourism industry of Bandarban. In total, the Bandarban Hill District's earnings range from BDT 2,726,153,000 to 3,621,959,000 annually.

Table 8: Summary of the total annual revenue earned by Bandarban Hill District

No of upazilas	Destinations/Sector	Minimum	Maximum
1	Ruma	138,691,000	237,820,800
2	Rowangchhari	170,244,000	220,590,000
3	Thanchi	1,198,170,000	1,355,868,000
4	Bandarban Sadar	1,099,908,000	1,647,948,000
5	Naikyangchhari	42,270,000	55,375,200
6	Alikodon	70,578,000	85,725,000
7	Lama	4,248,000	15,480,000
8	Toll received by BHDC Badarban kerihut Nilachal	1,774,000	1,774,000
9.	Meghla Parjataon by DC	270,000	378,000
Annual Income Range		2,726,153,000	3,621,959,000

The supply chain gap analysis: The research reveals significant deficiencies in supply chain management. Mainly due to the absence of a centralized government platform for information dissemination and resource allocation. Regarding marketing and promotional activities, the industry heavily relies on bloggers on social media, with limited planning and guidance, which restricts its reach. Notably, there is strong interest among tourists, with 80% expressing a desire for community-based tourism that fosters engagement with the local community's culture and traditions. This indicates a market opportunity for portable accommodations, such as homestays and camping sites. Just as every industrial management requires central management, so does the case of Bandarban. In light of the peace agreement signed on December 2, 1999, the tourism sector is a department under the control of the Bandarban District Council.

In the context of tourism decision-making and management, several parties are involved in this region. Specifically, the Bandarban district administration (DC Office) collaborates with the military as a security media spokesperson. Due to the sensitive situation in this area, the army and the district administration work together on matters related to travel bans and their lifting.

Research shows that a large portion of service providers are people from outside the region, mostly from the wealthy class. They have partnered with influential local individuals to establish hotels and restaurants in the area. Where the participation of ordinary people is very minimal. It is worth noting that, as a special region of Bangladesh, in the context of the hill tracts, outsiders of the three hill districts of Bandarban, Rangamati, and Khagrachari, are not allowed to buy land of these region. An individual need to obtain a permanent citizenship certificate from the district commissioner (DC) by acquiring a certificate from the headman and the Cercle Chief (king). However, it is observed that outsiders, by forming companies in collaboration with the local influential figures, establish themselves as shareholders and gain control over the land in the area. As a result, outsiders take advantage of the loopholes in the legal process and become landowners.

The Bandarban and the other two District Councils do not receive any special allocation from any ministry or the Ministry of Civil Aviation and Tourism for the development of the tourism industry. As a result, the opportunity to undertake special government projects in this regard is limited. Since the District Council is a local government institution, if it undertakes the implementation of tasks through its work plan, the committee in the area will be able to accelerate tourism-related activities. Currently, among the giant service providers are SAIRO, the Bangladesh Army, the District Administration, Border Guard Bangladesh (BGB), as well as external wealthy classes who are also involved. The research shows that the indigenous peoples' participation is at a minimum level.

Table 9: People's Participation Analysis. People's Involvement in Hotel & Restaurant Industry by Ethnicity

S.N	Upazilas Name	Mainstream community in Number	Indigenous
1	Bandarban Sadar	81	11
2	Thanchi	32 & BGB	20
3	Ruma	8 & Bangladesh Army	15
4	Rowangchhari	12	80
5	Alikadom	10, 1, 1,	1
6	Lama	6	Nill
7	Naikhoingchari	2	Nill
		155	127

Table 10: Driver By Decent

S.N	Upazilas Name	Mainstream	Indigenous
1	Bandarban Sadar	440	60
2	Thanchi	Vehicle-25, Boat-12,BGB-20	Vehicle-17, Boat-295
3	Ruma	86	12
4	Rowangchhari		
5	Alikadom	Bike-100, Tomtom-70	Bike-50, Tomtom-30
6	Lama	60 -70 Mahidra	
7	Naikhoingchari	0	0

Around Boga Lake, the Bawm community works in this industry besides farming. Two Bawm families are running new restaurants near Munlai Para. Ruma has 64 jeeps registered to carry tourists, of which the mainstream community owns 95%. Near Kewkradong, Lal Min Thawn, a Bawm, runs his hotel and restaurant.

In Thanchi, 25 major hotels and restaurants are in Thanchi Sadar Bazar. These 25 big hotels and restaurants make a minimum of 119,520,000 BDT and a maximum of 155,268,000 BDT annually. BGB alone earns 30% of total sales in Thanchi Sadar Bazar. Mainstream people have the maximum transport (Mahindra-Boleros).

Indigenous people run seasonal floating shops and restaurants at Reemakree Falls (Mukh) during the peak season. People around the locality build those restaurants and provide other services to tourists. This group has few shops, and they make a seasonal income for a living. These people mainly rely on Jhum cultivation and farming.

Since the multiplier effect theory applies in the case of tourism, with the arrival of tourists, retail shops, local rice hotels, transportation services, and the buying and selling of general raw materials and agricultural products increase. This happens due to the multiplier effect, and no separate initiative is required for this. At the same time, it is observed that the prices of goods in the area have increased due to the arrival of tourists.

On the other hand, during the unrest and extensive travel bans, when the military, through the office of the district commissioner, intervenes in tourism, an economic recession is observed in all sectors of the area. Mainly, agro-products and the tourism industry are the primary revenue generators of this area. As a result, when the travel ban is effective and prolonged, there are no buyers for agro-products. Due to the situation in 2024, the mangoes, lychees, pineapples, bananas, and other fruit products produced in Ruma and Thanchi Upazila rot and spoil in the gardens. It is worth mentioning that under normal circumstances, about 10,000 tourists visit

Bandarban district daily. The main issue with the supply chain is that there is demand, but the supply is hindered by the travel ban due to unrest. Additionally, the participation of the local youth and general public in this area is limited. If it is reviewed in light of Human Capital Theory, Democracy and Participatory Development Theory, Empowerment, and Inclusivity Theory, it becomes clear that as the participation and involvement of the youth and the local working class of the area increase, not only does the economic empowerment of the local people grow, but there is also overall development in society, leading to stability. The Bandarban District Council can implement community tourism activities by formulating a specific budget and work plan in its annual budget. In this regard, by implementing a pilot project, it can make clear selections for the subsequent steps and gradually implement them in phases.

4. Current Status and Challenges of Tourism in Bandarban

Ten years ago, around 700,000 tourists used to visit this region annually. Currently, the number has increased to over 1.5 million. Financially analyzing the situation, it can be observed that the tourism industry in Bandarban is generating significant revenue, ranging from 2.5 billion to 3.1 billion Bangladeshi Taka. However, due to the lack of a tourism model developed with the involvement of local people and youth, the profits mainly benefit big business owners and entrepreneurs. This situation hinders the equitable distribution of economic benefits. Interestingly, the places that attract tourists—such as the creeks, waterfalls, rivers, and mountains—are areas where local participation has remained minimal and the jobs created by elites provide them with marginal salary only. At this moment, it is crucial to ensure the highest level of involvement of local people in tourism development. If they are empowered and engaged, the natural environment will be better protected. However, currently, due to the lack of their participation in development, the environment is facing degradation. Outsiders are building structures haphazardly, turning streams and canals into drains, which will lead to further environmental damage shortly. If tourism continues to grow in this manner, Bandarban's natural beauty will soon be lost. Many outsiders, who illegally or unplannedly occupy land and take leases, have faced protests from the local population. In some cases, political influence allows these areas to be unlawfully taken over. Where development is happening unplanned and there is no involvement of local people in environmental conservation, environmental disaster and the downfall of this industry is only a matter of time.

5. Recommendations and Strategic Framework for Inclusive Community Tourism in Bandarban

To ensure sustainability, local government, and relevant authorities including BHDC, the DC office, the Ministry of Civil Aviation and Tourism of Bangladesh, and other relevant authorities including the Bangladesh Army must lead this development process as team players to help and ensure security where necessary to maximize the locals' benefits. In this regard, an integrated strategic framework must be implemented, encompassing execution, monitoring, and follow-up processes mainly by BHDC.

By prioritizing the involvement e.g. with the committees of local youth, women, and entrepreneurs the benefit of creating entrepreneurs and working opportunities, the benefits can be equalized or balanced. Building capacity through targeted training programs, and engaging university students in these efforts can cultivate a new generation of community leaders and stakeholders resulting in positive attitudes toward protecting cultural values and traditions. BHDC must play a crucial role, employing experts for strategic planning and forming an executive committee for regular progress reviews. An institutional framework has been proposed below for the effective execution of the roadmap taken by BHDC.

An institutional framework is also suggested below to execute the CBT for Bandarban Hill District. Tourism Management Strategies for Bandarban Hill District: BH

Proposed Institutional Framework

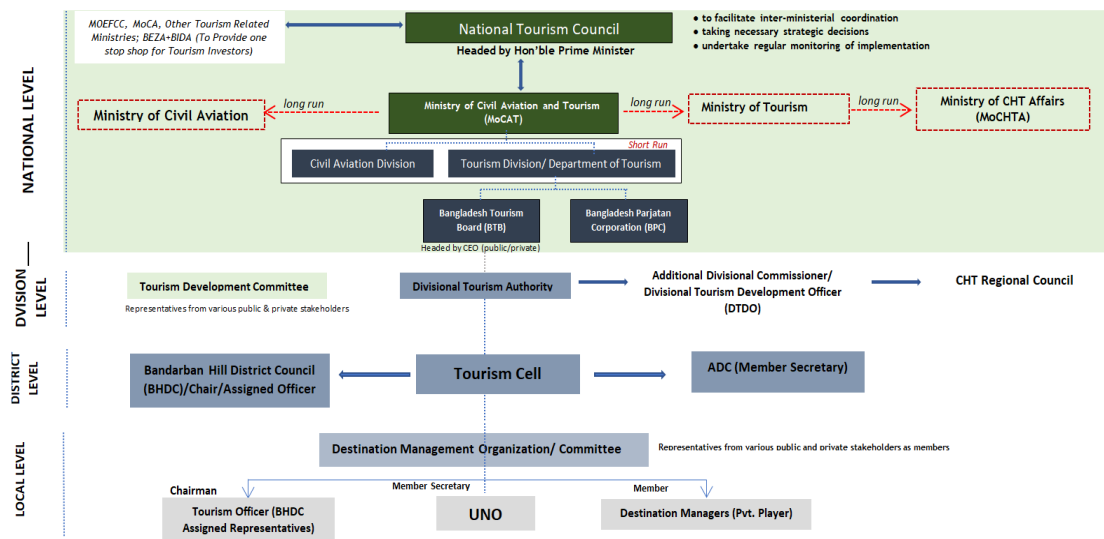


Figure 1: Proposed Institutional Framework

As per the BHDC Act, 1989, 1998 (amended) and Regional Council Act, 1998, Bandarban Hill District Council is the key authority in the district and has the legal mandate to manage, supervise, plan, and execute tourism-related programs and coordinate with all concerned stakeholders.

The proposed setup will have a National Tourism Council (NTC), headed by the Hon'ble Prime Minister as the apex decision-making body. It will have representations from all major tourism-related Ministries, including the Ministry of Civil Aviation and Tourism (MoCAT), Ministry of Environment Forest and Climate Change (MoEFCC), Ministry of Culture, BEZA, BIDA, etc. Under the Tourism wing of the MoCAT, functions the Bangladesh Tourism Board (BTB) and the Bangladesh Parjatan Corporation (BPC). Major structural changes/additions are being proposed for the BTB in the current Master Plan. The major recommendations include the setting up of the Divisional Tourism Authority at the Division level chaired by the Additional Divisional Commissioner or a specially appointed Divisional Tourism Development Officer (DTDO). The District Tourism Cells will oversee the DMOs committees. This body will have a Destination Manager to carry out the day-to-day activities of the body and will be supervised by the Bandarban Hill District Council/assigned person of the district concerned.

Finally, BHDC can develop an inclusive master plan for Bandarban, aligned with the SDG-2030 goals that empower communities, protect cultural and natural resources, and foster economic growth of Bandarban Hill District. By leveraging the region's strengths, it will help to create job opportunities and promote entrepreneurship among youths, the working class, and women. As a local authority, BHDC must act swiftly by integrating the tourism roadmap for this region to reduce the current gap and ensure long-term benefits for local communities while safeguarding the region's cultural and natural heritage.

References

- Banglapedia. (2022, 8 25). Retrieved 8 25, 2022, from Banglapedia: <https://www.bing.com/search?q=Naikhongchhari+Upazila%2C+Bandarban+Hill+District%2C+covers+an+area+of+463.61+sq+km%2C+located+between+21%11%27+and+21%40%27+north+latitudes+and+between+92%06%27+and+92%23%27+east+longitudes.&cvid=f0c41e715da8424e8e17cb603c66>
- Barcelona Field Study Centre. (2025, 2 27). Retrieved 2025, from <https://geographyfieldwork.com/TouristMultiplier.htm>
- DC Bandarban, 2022. (2024, 12 22). Retrieved from <https://www.bandarban.gov.bd/>: https://www.bandarban.gov.bd/en/site/top_banner/NujO-%E0%A6%AE%E0%A7%87%E0%A6%98%E0%A6%B2%E0%A6%BE-%E0%A6%AA%E0%A6%B0%E0%A7%8D%E0%A6%AF%E0%A6%9F%E0%A6%A8-%E0%A6%95%E0%A6%AE%E0%A6%AA%E0%A7%8D%E0%A6%B2%E0%A7%87%E0%A6%95%E0%A7%8D%E0%A6%B8-%E0%A7%A8

- Lange, O. (1943, 7). The Theory of the Multiplier. Retrieved 8 22, 2025, from <https://www.jstor.org/stable/1905676>:
<https://www.jstor.org/stable/1905676>
- Ministry of CHT Affairs. (2022, 6 9). Retrieved 10 22, 2024, from <http://mochta.portal.gov.bd/>:
http://mochta.portal.gov.bd/sites/default/files/files/mochta.portal.gov.bd/page/927ea5ae_af9f_4292_868e_195a638ef2c6/Bandarban%20Project.pdf
- Ministry of Finance. (2024, 9 10). Retrieved 2024, from
https://mof.portal.gov.bd/sites/default/files/files/mof.portal.gov.bd/page/3ef1111d_f0d6_41ea_aca9_6afb61228825/G-2_09_55_CHT_English.pdf:
https://mof.portal.gov.bd/sites/default/files/files/mof.portal.gov.bd/page/3ef1111d_f0d6_41ea_aca9_6afb61228825/G-2_09_55_CHT_English.pdf
- Rafael Robina-Ramírez, 2. (2022, 9 2). MDPI. Retrieved 8 22, 2024, from <https://www.mdpi.com/2071-1050/12/18/7248>:
<https://www.mdpi.com/2071-1050/12/18/7248>
- Science Daily. (2019, 4 8). Retrieved 2 25, 2025, from www.sciencedaily.com:
<https://www.sciencedaily.com/releases/2019/04/190408114002.htm>
- The Bangladesh Bureau of Statistics (BBS). (2022, 2 22). Retrieved 2 25, 2025, from <https://bbs.portal.gov.bd/>:
https://bbs.portal.gov.bd/sites/default/files/files/bbs.portal.gov.bd/page/5695ab85_1403_483a_afb4_26dfd767df18/2021-02-22-16-57-c64fb3d272175e7efea0b02de6a23eaa.pdf
- UN Bangladesh 2022. (2022). Retrieved 5 22, 2024, from <https://bangladesh.un.org/en/sdgs>:
<https://bangladesh.un.org/en/sdgs>
- World Travel Tourism Council. (2024). Retrieved 10 11, 2024, from <https://wtcc.org/research/economic-impact>:
<https://wtcc.org/research/economic-impact>

The Model of Social Sustainability in Music Festivals: An Empirical Contrast

David Siles¹, Antonio García-Sánchez² and María del Mar Vázquez Méndez²

¹Murcia University, Spain

²Cartagena University UPCT, Spain

david.siles@um.es

a.garciasanchez@upct.es

mar.vazquezmendez@upct.es

Abstract: The conceptual model of social sustainability in musical events was developed and presented in a social analysis exercise using theoretical-practical methods to obtain relevant conclusions about its effects on the social sustainability of a tourist destination and its prosperity. After analyzing key indicators of social sustainability from the perspective of the destination's inhabitants, tourists, and experts in the tourism sector, it was possible to draw the necessary conclusions to design the conceptual model, as well as its advantages and disadvantages. Thus, there is a starting point for the analysis of social sustainability in this type of event from which to advance in the practical development of the conceptual model by carrying out the empirical contrast. This work intends to use as a basis the conceptual model to contrast it using annual surveys focused on social sustainability as those carried out at the time of the initial development of the model, surveys about the degree of acceptance from residents designed to measure opinions about the social impact of the event. Through the data obtained from the surveys during three time periods in a row, it is pretended to contrast the validity of the model with the passage of the different editions of the music festival, analyzing the coincidences and deviations produced among the analyzed periods. The residents of the destination should obtain an improvement in their standard of living thanks to what the tourists bring them. Finally, after answering the hypothesis set, aspects related to the robustness and durability of the model, as well as the tourist valuation of the festival and, therefore, the evolution of the prosperity of the destination and the temporal influence of the festival on that prosperity, can be detailed. The contrasted model of social sustainability in music festivals will be useful to managers of tourist destinations, who will be able to organize this type of events with the knowledge of the implications that the model reveals, both positive and negative, at the level of commitment with the inhabitants of the destination, as well as with the tourists who come and the contribution they make.

Keywords: Social sustainability, Conceptual model, Sustainable tourism, Music festivals, Inhabitants' prosperity

1. Introduction

A music festival is an event that features numerous musicians or bands playing consecutively, many of the most popular and well-known festivals may last several days. In terms of economic impact, as indicated by Chacko and Schaffer (1993), has a significant impact on the destination where they are developed, and represent themselves a way of economic development by registering not only visits but also a considerable media return.

According to specialized literature, music festivals are part of what is known as experience tourism, also known as active tourism (Wright, Dickson, and Ajiee 2021). Festivals have become the main form of live music consumption, surpassing other types of organizations such as concerts in venues or the open air and surpassing other shows in number and attendance.

The growth of tourism as a consequence of the birth of new festivals and live music worldwide is an obvious fact. It is one of the most dynamic segments of the tourism market. Despite the notable economic impact they generate and the positive externalities on other types of tourism, it is a sub-sector that has not yet had a very long history. There is little research on its impacts, which makes documentary and comparative work difficult as there are no data and statistics with a considerable time interval, as is the case with other tourism sub-sectors.

The economic and tourist impact of such events has been proven, however, in addition to all the positive effects they produce, the impact of these festivals on society is not usually considered. Not all the effects of a festival have a positive impact, there are variables that society surrounding the event can analyze that can be beneficial or detrimental to it.

These indicators and their necessary analysis form part of what is known as the event's social sustainability. A festival must be, in addition to being profitable and a tourist attractor, a generator of social sustainability for the inhabitants of the destination. To measure social sustainability, the focus should be on the festival's effects have on the prosperity of the inhabitants of the destination (Rogers et al. 2012).

The variables that make up the social sustainability associated with the event should be questioned by the inhabitants of the destination themselves, including items that reflect satisfaction with the event, its suitability, its repercussions on society, or the inconvenience it may cause.

It is possible to determine, given the previous work done creating the Conceptual Model (Siles, García-Sánchez, and Vázquez-Méndez, 2024) and the literature review carried out in this paper, that a socially sustainable event will improve the prosperity of the inhabitants of the destination while generating socially sustainable tourism. The Conceptual Model is presented in figure 1 where Social Sustainability is determined by some variables, with the additional objective of generating social welfare.

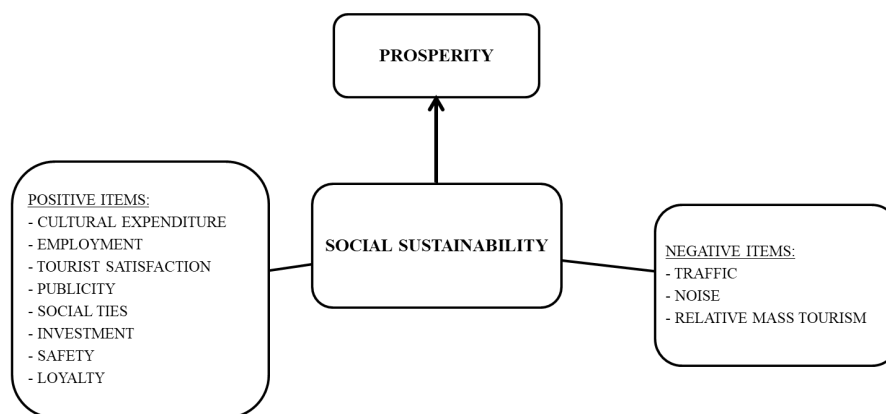


Figure 1: Social Sustainability Conceptual Model

From what has been said so far, it can be deduced that, to contrast the model in the framework of the analysis of the social sustainability of a music festival such as the one presented in this article, two hypotheses must be established. The first one should test the validation of the model through quantitative data given by the residents, and the second one hypothesis must assess that if the model is socially sustainable it will generate prosperity among the inhabitants.

2. Theoretical Background

The original concept of sustainability has evolved from sustainability of the natural environment to a multidimensional consideration that includes other factors, as Wilkinson, Hill, and Gollan (2001) rightly point out. Additionally, optimal and responsible management by governments and companies in this way is necessary (Klassen 2000).

Initially described by the United Nations as sustainable development in tourism in the literature, this development implies a conservationist view of the environment, community or social, and economic. The addition of the role of society to this model would condition how to develop sustainable tourism.

Several authors have done constructive research about this background, with Johnston and Tyrrell (2005) finding that sustainable tourism must maximize the combined benefit to the environment and social acceptance. Tourism, like other sectors of activity, must be sustainable, the links between tourism, sustainability, and prosperity are complex, as Buckley (2012) rightly points out, and a balance between these factors can only be achieved through appropriate social input.

Tourism research has grown significantly, but there are many more empirical studies than theoretical ones (Pritchard, Morgan, and Ateljevic 2011). A tourist destination does not behave like a product (Romer 1986), it does not have to run out of steam to start a new cycle, it can follow other patterns and can be managed. There is a common element in the later stages of tourism development, which leads to the deterioration of the destination, destination managers begin to consider sustainability as a key variable, in fact, in some cases it is the only possibility according to Cooper and Jackson (1989).

Later, in 1993, Oppermann configured a model in which tourism development was affected by economic factors. Tourism development models had to have a positive effect on the destination's economic model, and its sustainability was conditioned by the destination's prosperity.

The definition of sustainable tourism is established once Butler (1999), considering the dimensions of the word sustainability, states that sustainability measures have to be developed and applied to tourism development,

which requires thorough research on social, economic, and environmental aspects and focus on the sustainable future of the destination.

Any conceptualization of sustainable tourism must take into account the local community as well as the environment and the economy (Hardy, Beeton, and Pearson, 2002), which means that social sustainability will be an equally important factor as other factors such as economic development and environmental conservation.

According to Andereck and Nyaupane (2011), the sustainability of the destination hosting an event, as seen through the well-being of the inhabitants, comprises four dimensions: physical, social, psychological, and environmental. Through these dimensions, studies such as the one made by Pfitzner and Koenigstorfer (2016) were able to determine improvements in the quality of life of residents at the end of an event.

In general terms, it is concluded that analyzing the economic, environmental, socio-cultural, and political dimensions related to the celebration of a festival has an impact on the quality of life of a community, as Arcodia and Whitford (2006) state that it will determine the future support for the festival.

These factors need to be detailed to determine their real impact on sustainability. The economic factor generates employment and income among residents, and the social factor has a deep effect on the daily life of the inhabitants as it includes relations with visitors, tolerance or a sense of well-being, and constitutes any effect on the quality of life of the inhabitants (Fredline, Jago, and Deery 2005). Based on the assumption that the realization of a festival should not be fully sustainable per se, any organized event entails a certain drain on resources (Zifkos 2015).

The impact on the environment is very decisive because it includes variables that can have a negative impact on the inhabitants. The control of sustainability is essential, many destinations avoid the tourism phase that leads to mass tourism and opt to use sustainability as a means to stay in another, more beneficial, phase, an issue that Karamustafa and Yilmaz (2020) theoretically address in their view on mass tourism.

Having defined the meaning of sustainable tourism on the basis of three common pillars, which are environmental, economic, and social sustainability, while all pillars are important and relevant, it is interesting to focus on social sustainability for several reasons, mainly because it is the pillar that directly indicates sustainability as measured by the inhabitants, considering their prosperity.

On the other hand, it is the least analyzed concept in this type of event, which tends to focus only on assessing the environmental and economic impact on the destination, cases usually analyzed. However, social sustainability brings another dimension to these studies of music events, where its consequences on the destination's society will determine its future well-being and continuity.

To deeper understanding of the current situation about the importance of social sustainability, we must search into texts such as those by Drucker (1993) or Manson (2015), which indicate how society has crossed the borders of capitalism, especially after the financial crisis of 2008, towards a sustainable global economy that is more fair to society. The evolution of societies leads them to overcome that capitalist era to pursue other objectives focused on sustainability and social progression. In this new knowledge society, individuals have learned, combine visions of the academic world and business management and seek well-being beyond the economic. A new society where socialism proliferates in the form of well-being; where innovation and services must improve the living conditions of the inhabitants of a destination.

When analyzing social sustainability, positive factors must be considered, Ritchie, Chien, and Shipway (2020) address the perception of inhabitants and their support as decisive factors, and negative factors such as traffic, visitor congestion, noise, or the opportunity cost of other events (Chien, Ritchie, Shipway, and Henderson 2012).

3. Methodology

The next step in this work is to detail how the event has affected the city and its inhabitants in order to determine the social sustainability based on its prosperity. From a social perspective, a sustainable event should therefore leave a beneficial legacy for the host community and all those involved.

A socially sustainable event reinforces the cultural values of the population, enriches it, and promotes understanding and tolerance. On the contrary, it can be said that an event is not sustainable from a social point of view if it generates rejection among residents, discrimination and problems of habitability.

Inhabitants' support for the event is analyzed through questions about the benefits to them in particular and to society in general, their commitment to that particular event, and their intention to support the event itself (Chien et al. 2012).

To understand and determine the social factor, Waterman (1998) describes it as social development in terms of benefit and well-being, being a consequence of the learning provided by the festival, the creation of interpersonal relationships, understanding of the theme of the festival, and the association of the festival with the city where it is held (Moscardo 2008).

For this study, data from three different periods have been extracted in which residents have given a social valuation of the event as a tourist destination, data year range is 2022-2024. A data panel system with inhabitants' assessment of social sustainability has been chosen, so this method is suitable for the results that the article is looking for.

The sustainability of the social impact of the Rock Imperium festival, located in Cartagena (Spain), was analyzed by means of a survey of people who lived or worked in the city during the event. Among the surveys carried out, 212 surveys were selected, all of which contained affirmative answers to the question about whether they lived or worked in the city during the event. The responses were obtained only a few days after the event.

Respondents were given a series of statements to rate on a Likert scale of 1 to 5 their degree of agreement or disagreement with the statement, with 1 strongly disagreeing, 2 partly disagreeing, 3 neither agreeing nor disagreeing, 4 partly agreeing, and 5 strongly agreeing. Some of these statements imply a positive social impact and others a negative social impact, as discussed below.

A dataset of sixteen indicators has been disposed for this study, eleven indicators form the Social Sustainability Construct, and the other five define the Construct of Prosperity.

The prosperity indicators dataset comprises variables that can make a prosperous destination and offer a better quality of life for its inhabitants. It includes economic indicators and relevant indicators about improving the quality of life in the destination too such as the ones related to jobs, investment, and satisfaction with the festival measured by their desire for the festival to be held again. The research is based on important affirmations that tourism researchers have made about prosperity at the destinations. Employment can be an economic indicator to measure prosperity, can improve the workers' quality of life, raises productivity at the destination, and generates consumption through salaries (Dwyer & Kim, 2003; Dwyer, Livaic, & Mellor, 2003; Craigwell, 2007).

Additionally, we have to take into account every indicator that can make the tourists and the destination's inhabitants feel comfortable and happy at the destination, so happiness indicators, environmental indicators (Goh, 2012), or any indicator that can make the way of life better can be valid.

These affirmations let us consider some variables such as generating jobs, investment in the city, public investment, residents' satisfaction, or giving prosperity to the destination; as prosperity generators.

Social sustainability comprises indicators relative to social ties, the increase in leisure activities and cultural activities, residents' loyalty to the festival, socially sustainable organization of the event, the ones relative to image and publicity, and problems such as traffic, noise, insecurity, or mass tourism; all of them deduced from the conceptual model of social sustainability.

The measure selected for the PLS analysis is the median value of each variable in the three analyzed periods because this way one can obtain the variation among the years of the surveys collected. Additionally, we can understand the results from the model in an easier way because the model measures variance between the latent variables.

3.1 Partial Least Squares Methodology

To develop the principal model, we need a second generation technique of multi-variate analysis because we have three independent variables that have effects among them. Structural Equation Modelling (SEM) combines multiple regression with factorial analysis so we can estimate models with several linear regressions and a factorial analysis of the variables in every construct together. SEM estimates and assesses the outer model (relationship between indicators and constructs) and the inner model (effect among the constructs).

Partial Least Squares (PLS) is a SEM technique based on variance very used in the literature, in general, and in tourism economics in particular (García-Sánchez, Siles, and Vázquez-Méndez, 2018). We have chosen PLS because is more suitable for models with few observations (Chin, 2010). It is a nonparametric technique so we don't have to suppose normality in all the dataset. The model is analyzed in the terms according to Wong (2013) where the inner and outer models are analyzed with the significance, loadings, reliability, and the rest of the necessary parameters.

In the initial model, we have set the variables selected to form two constructs or latent variables. The data set is composed of secondary data, PLS can also be used with secondary data (Latan & Ghazali, 2012). The latent variables are social sustainability and prosperity. The two constructs are reflective constructs because constructs cause the indicators, so the variables are usually correlated and interchangeable without changing the construct's concept.

Covariation among the indicators is caused by variation in the latent variable, so changes in the construct can cause changes in the indicators, but not the other way around (Jarvis, Mackenzie, & Podsakoff, 2003). As we have formulated before, the hypotheses are the following:

H₀: The model of social sustainability is contrasted with the variables chosen.

H₁: Social sustainability has a relevant influence in the destination's prosperity.

As aforementioned, PLS is more suitable for small samples (Reinartz, Haenlein, & Henseler, 2009), and we have a reduced dataset that follows the rule of 10. Thus, the number of observations must be 10 times higher than the maximum number of arrows that one construct receives for having a significance level of 0.5 and statistical power of 0.8. Our final dataset comprises 212 observations; following the rule, there must be over 110 to be valid.

After identifying the variables that can form every construct from the literature review, we dispose of them in the general model as part of every latent variable. Checking the results, we can make the following statements: first, the algorithm converged after 7 iterations from a maximum of 300; thus, it is a satisfactory estimation.

The software SmartPLS builds every construct with a few indicators that are sufficient to represent the concept. One indicator has been removed after checking the results, private investment had a low load on the model because public investment gathers the effect. The loadings of the indicators in the final model are higher than in the initial model.

The results of the PLS algorithm are presented in figure 2.

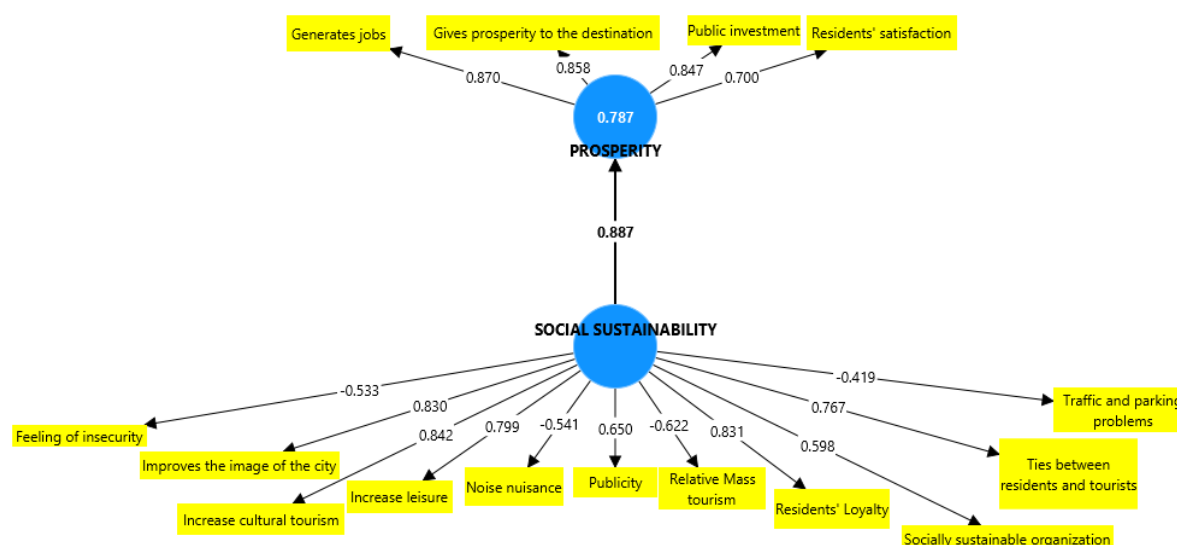


Figure 2: Model of social sustainability and prosperity with a PLS algorithm

The coefficient of determination R^2 is 0.787 for the endogenous latent variable prosperity. The latent variable of social sustainability explains 78.7% of the variance in prosperity. Values above 0.36 are high (Wetzels, Odekerken-Schröder, & Van-Oppen, 2009). Chin (1998) said that approximately 0.67 is a high value.

The inner model suggests that social sustainability has a strong effect on prosperity (0.887). The hypothesized path relationship between social sustainability and prosperity is statistically significant. As Chin (1998, p. XIII) affirms: standardized paths should be approximately 0.2 and ideally above 0.3 to be considered meaningful.

The validity of the model is tested with relevant indicators. Figure 2 indicates that all the indicators have individual indicator reliability values larger than the minimum accepted 0.4 and are much closer to the preferred level of 0.7. We must square each outer loading to find the indicator reliability value: 0.70 or higher is preferred. In exploratory research, 0.4 or higher is acceptable. (Hulland, 1999; Hair, Ringle, & Sarstedt, 2013). Loadings of 0.5 or 0.6 may be acceptable (Chin, 2010).

The majority of the loadings are greater than 0.707, as Chin (2010, p. 685) suggests is ideal, there are some of them that are below this measure but near so can be kept on the model, investment was removed from the model so the final model can improve its meaning. The loadings of the final model are disposed of in table 1. The negative effects have lesser loadings, as can be expected because of their negative effects on the model, but it is a relevant result, the negative effects have not got a high loading on the model.

Our model is exploratory because we attempt to prove whether social sustainability affects prosperity and theoretical knowledge about this assumption is limited (Chin, 2010).

Table 1: Loadings of the final model

	PROSPERITY	SOCIAL SUSTAINABILITY	SQUARED V PROSP	SQUARED V SUST
Feeling of insecurity		-0.533		0.284
Generates jobs	0.87		0.757	
Gives prosperity to the destination	0.858		0.736	
Improves the image of the city		0.83		0.689
Increase cultural tourism		0.842		0.709
Increase leisure		0.799		0.638
Noise nuisance		-0.541		0.293
Public investment	0.847		0.717	
Publicity		0.65		0.423
Relative Mass tourism		-0.622		0.387
Residents' Loyalty		0.831		0.691
Residents' satisfaction	0.7		0.49	
Socially sustainable organization		0.598		0.358
Ties between residents and tourists		0.767		0.588
Traffic and parking problems		-0.419		0.176

In the model presented, the indicators with a higher incidence in social sustainability are: increased cultural tourism, residents' loyalty, the image of the city, and leisure, followed by others with a lesser load such as social ties, publicity, and a socially sustainable organization; finally, the negative indicators that have low load on the model such as relative mass tourism, feeling of insecurity, noise, and parking problems. On the other hand, the most important indicators for prosperity are the creation of jobs, the positive impact generated (gives prosperity), public investment, and resident's satisfaction with a lesser load.

To measure construct reliability, Cronbach's alpha is used to measure internal consistency reliability, and composite reliability can be also used (Hair, Sarstedt, Ringle, & Mena, 2012). Looking at composite reliability, all values obtained are larger than 0.6; thus, high levels of internal consistency reliability have been demonstrated among the two reflective latent variables. Cronbach's alpha is greater than 0.7 (Hair, Ringle, & Sarstedt, 2013) in prosperity and near in social sustainability, the negative variables avoid a higher value but have to be kept in the model because of their theoretical relevance. All the values are shown in table 3.

To check convergent validity, the average variance extracted (AVE) from each latent variable must be greater than 0.5 (Hair, Ringle, & Sarstedt, 2013). Prosperity's value is greater than this threshold and social sustainability's value is very close to it.

Bootstrapping process is used to check the significance of the inner and outer models with a T-statistics test. The test is a two-tailed T-test with a significance level of 5%. The path coefficient is significant if the T-statistics test is larger than 1.96. In our model, the path coefficients between social sustainability and prosperity are significant at a 1% level. In the outer model, moreover, the T-statistics test for the variables presents all the results significant at a 1% level.

To avoid the collinearity problem, variance inflation factor values must be 5 or lower (Hair, Ringle, & Sarstedt, 2011). In our model, all the values in the inner and outer models are lower than 5.

The f^2 effect measures how much the exogenous latent variable contributes to an endogenous latent variable's R^2 value (the strength of the relationship between the latent variables) (Chin, Marcolin, & Newsted, 1996). The values of 0.02, 0.15, and 0.35 mean a small, medium, or large effect, respectively (Cohen, 1988; Chin, 2010). The values of that effect in the inner model are large for the relationship between social sustainability and prosperity (3.701).

The total effects are the sum of the direct effects and indirect effects. Thus, the analysis of the total effects we have performed shows that the total effects are statistically significant (P -value < 0.001) between the constructs. The total effects analysis demonstrates the constructs are related, and this result is crucial to specifying that this relationship can be predictive, as Söllner, Bitzer, Janson, and Leimeister (2017) indicate.

4. Results and Implications

The first implication of the results that must be enhanced is that the final model of social sustainability is formed by the indicators previously defined in the theoretical model. Although the variables that imply a negative effect could be removed from the model, their appearance is still relevant because these variables have a negative effect, their incidence is low with low loadings as the residents of the destination do not consider them relevant enough.

The development of communities must be in accordance with cultural advancement, as Escobar (2008) pointed out, this cultural evolution is what will indicate how society must develop its activities, to be sustainable in the long term, these concepts must advance and develop in a united way. Participation with locals is essential to contribute towards sustainable development through the provision of work, leisure or investment.

On the other hand, Gibson-Graham (2006) makes us consider the economic transformation that societies have experienced towards thoughts that make them socially sustainable and, therefore, in this article we must take into account that these concepts are part of that prosperity, not only in the economic way, but also that this event helps their society feel more identified with their territory, the desire to repeat the festival as part of their loyalty or to share aspects of the event such as the type of music, the image it gives to the city or the tourist flow.

The next question is whether the festival is socially sustainable, and what the most relevant indicators are. As the model has revealed, variables such as the addition to the culture of the place, the improvement of the image as a tourist destination, the social ties created, or the residents' willingness to have more editions of the event show that holding the festival is really a socially sustainable event.

Finally, the relationship between the two main constructs has been proved with satisfactory results. The destination is not only socially sustainable but also prospers the city, as measured by economic and satisfaction variables.

5. Conclusions

Social sustainability is a concept sufficiently defined in the literature, although it has not been widely studied. However, certain approximations can be obtained through studies of the social environment where the aim is to analyze such a vision. Considering the opinion of the destination's residents and their well-being in its different dimensions will determine the convenience of holding a festival in their environment.

The social sustainability survey of residents allowed us to determine the degree to which they agreed with certain items describing social sustainability values, we concluded that the inhabitants have obtained a positive and robust degree of prosperity as measured by the values of their answers and by their affirmation of wanting the event to be held again in future editions.

Given the surveys carried out and the contrast of the variables obtained with the literature reviewed, it has been possible to describe the items that affect social sustainability in such a way, that there are variables that affect social sustainability positively and others negatively depending on the number of attendees and their contribution. The model represented has been described taking into account the determined variables.

The model has been contrasted and is robust and the methodology applied has confirmed the two hypotheses with significant results. A variety of tests have been made with satisfactory effects that point out the relevance of each indicator as well as the incidence of the main constructs.

Social sustainability is a generator of prosperity at the tourism destination like others tested in literature such as competitiveness and innovation (García-Sánchez, Siles, and Vázquez-Méndez, 2018), the social sustainability construct has a relevant incidence in prosperity (0.887) as the PLS model explained.

Analyzing the items by frequency in the three periods, it can be concluded that a kind of fatigue has been detected in the residents, highlighting the negative effect of noise that the organization has not minimized over the years. Anyway, the value of the indicators is similar in terms of impact, and the results can determine the relevance of the model proposed as well as its suitability.

Acknowledgements

We appreciate the funding received from the Tourism Institute of the Region of Murcia through the Chair of Sustainable Tourism of the Region of Murcia UPCT-ITREM to complete this work.

References

- Arcodia, C. and Michelle Whitford (2006) "Festival Attendance and the Development of Social Capital" *Journal of Convention and Event Tourism*, vol 8, No. 2, pp. 1-18. https://doi.org/10.1300/J452v08n02_01.
- Andereck, K. L. and Gyan N. (2011) *Development of a Tourism and Quality-of-Life Instrument*. In Quality-of-life community indicators for parks, recreation and tourism management, edited by Megha Budruk and Rhonda Phillips, pp. 95-113. Dordrecht: Springer.
- Buckley, R. (2012) "Sustainable Tourism: Research and Reality" *Annals of Tourism Research*, Vol 39, No. 2, pp. 528-546. <https://doi.org/10.1016/j.annals.2012.02.003>.
- Butler, R. W. (1999) "Sustainable Tourism: A State-of-the-Art Review", *Tourism Geographies*, Vol 1, No. 1, pp. 7-25. <https://doi.org/10.1080/14616689908721291>.
- Chacko, H. E. and Jeffrey D. S. (1993) "The Evolution of a Festival: Creole Christmas in New Orleans", *Tourism Management*, Vol 1, pp. 475-482. [https://doi.org/10.1016/0261-5177\(93\)90100-Y](https://doi.org/10.1016/0261-5177(93)90100-Y).
- Chin, W. W. (1998) "Issues and Opinions on Structural Equation Modelling", *MIS Quarterly*, Vol 22, No. 1, pp. VII-XVI. <https://www.jstor.org/stable/249674>.
- Chin, W. W. (2010) *How to Write and Report PLS Analyses*. In: Esposito Vinzi, V., Chin, W.W., Henseler, J., Wang, H. (Eds.), *Handbook of Partial Least Squares: Concepts, Methods and Applications* (Springer Handbooks of Computational Statistics Series, vol. II, pp. 655-690). Springer, Heidelberg, Dordrecht, London, New York.
- Chin, W.W., Marcolin, B. L. and Newsted, P. R. (1996) *A Partial Least Squares Latent Variable Modelling Approach for Measuring Interaction Effects: Results from a Monte Carlo Simulation Study and Voice Mail Emotion/Adoption Study*. In J. I. DeGross, S. Jarvenpaa, & A. Srinivasan (Eds.) *Proceedings of the Seventeenth International Conference on Information Systems* (pp. 21-41).
- Chien, P. M., Brent W. R., Richard S. and Holly, H. (2012) "I Am Having a Dilemma: Factors Affecting Resident Support of Event Development in the Community", *Journal of Travel Research*, Vol 51, No. 4, pp. 451-463. <https://doi.org/10.1177/0047287511426336>.
- Cohen, J. (1988) *Statistical Power Analysis for the Behavioural Sciences* (2nded.). Lawrence Erlbaum Associates. Hillsdale: New Jersey. <https://doi.org/10.4324/9780203771587>.
- Cooper, C. and Stephen, J. (1989) "Destination Life Cycle: The Isle of Man Case Study", *Annals of Tourism Research*, Vol 16, pp. 377-398. [https://doi.org/10.1016/0160-7383\(89\)90051-0](https://doi.org/10.1016/0160-7383(89)90051-0).
- Craigwell, R. (2007) "Tourism Competitiveness in Small Island Developing State", *Research Paper 2007/19 United Nations University, World Institute for Development Economics Research*, Helsinki: Finland.
- Drucker, P. F. (1993). *Post-Capitalist Society*, New York: HarperCollins, pp. 1-16.
- Dwyer, L. and Kim, C. (2003) "Destination Competitiveness: Determinants and Indicators", *Current Issues in Tourism*, Vol 6, No. 5, pp. 369-414. <https://doi.org/10.1080/13683500308667962>.
- Dwyer, L. Livaic, Z. and Mellor, R. (2003). "Competitiveness of Australia as a Tourist Destination", *Journal of Hospitality and Tourism Management*, Vol 10, No. 1, pp. 60-79.
- Fredline, L., Leo J. and Margaret D. (2005) "Host Community Perceptions of the Impacts of Events: A Comparison of Different Event Themes in Urban and Regional Communities", *Australia: CRC for Sustainable Tourism Pty Ltd 2006*.
- Escobar, A. (2008). *Territories of difference: place, movements, life, redes* Durham, N. C.: Duke University Press. <https://doi.org/10.1215/9780822389439>

- García-Sánchez, A., Siles, D. and Vázquez-Méndez, M. M. (2018) "Competitiveness and innovation: effects on prosperity", *Anatolia*, Vol 30, No. 2, pp. 200-213. <https://doi.org/10.1080/13032917.2018.1519179>.
- Gibson-Graham, J. (2006). *The End Of Capitalism (As We Knew It): A Feminist Critique of Political Economy*. (First edition ed.) Minneapolis: University of Minnesota Press. <https://muse.jhu.edu/book/27689>.
- Goh, C. (2012) "Exploring Impact of Climate on Tourism Demand", *Annals of Tourism Research*, Vol 39, No. 4, pp. 1859-1883. <https://doi.org/10.1016/j.annals.2012.05.027>.
- Hair, J. F., Sarstedt, M., Ringle, C.M. and Mena, J.A. (2012) "An Assessment of the Use of Partial Least Squares Structural Equation Modelling in Marketing Research", *Journal of the Academy of Marketing Science*, Vol 40, No. 3, pp. 414-433. <https://doi.org/10.1007/s11747-011-0261-6>.
- Hair, J. F., Ringle, C. M. and Sarstedt, M. (2011) "PLS-SEM: Indeed a Silver Bullet", *Journal of Marketing Theory and Practice*, Vol 19, No. 2, pp. 139-151. <https://doi.org/10.2753/MTP1069-6679190202>.
- Hair, J. F., Ringle, C. M. and Sarstedt, M. (2013) "Partial Least Squares Structural Equation Modelling: Rigorous Applications, Better Results, and Higher Acceptance", *Long Range Planning*, Vol. 46, pp. 1-12. <https://doi.org/10.1016/j.lrp.2013.08.016>.
- Hardy, A., Beaton, J. S. R. and Pearson, L. J. (2002) "Sustainable Tourism: An Overview of the Concept and its Position in Relation to Conceptualisations of Tourism", *Journal of Sustainable Tourism*, Vol 10, No. 6, pp. 475-496. <https://doi.org/10.1080/09669580208667183>.
- Hulland, J. (1999) "Use of Partial Least Squares (PLS) in Strategic Management Research: A Review of Four Recent Studies", *Strategic Management Journal*, Vol 20, No. 2, pp. 195-204. [https://doi.org/10.1002/\(SICI\)1097-0266\(199902\)20:2<195::AID-SMJ13>3.0.CO;2-7](https://doi.org/10.1002/(SICI)1097-0266(199902)20:2<195::AID-SMJ13>3.0.CO;2-7).
- Jarvis, C. B., Mackenzie, S. B. and Podsakoff, P. M. (2003) "A Critical Review of Construct Indicators and Measurement Model Misspecification in Marketing and Consumer Research", *Journal of Consumer Research*, Vol 30, No 2, pp. 199-218. <https://doi.org/10.1086/376806>.
- Johnston, R. J. and Timothy J. T. (2005) "A Dynamical Model of Sustainable Tourism", *Journal of Travel Research*, Vol 44, No. 2, pp. 124-134. <https://doi.org/10.1177/0047287505278987>.
- Karamustafa, K. and Mustafa, Y. M. (2020) "Destination Life Cycle: A Conceptual Approach Based on the Turkish Experience", *Journal of Tourism and Gastronomy Studies*, Vol 8, No. 4, pp. 439-451. <https://doi.org/10.21325/jotags.2020.696>.
- Klassen, R. D. (2000) "Exploring the Linkage between Investment in Manufacturing and Environmental Technologies", *International Journal of Operations and Production Management*, Vol 20, No. 2, pp. 127-147. <https://doi.org/10.1108/01443570010304224>.
- Latan, H. and Ghazali, I. (2012) *Partial Least Squares: Concept, Technique and Application SmartPLS 2.0 M3*. Badan Penerbit Universitas Diponegoro, Semarang.
- Mason, P. (2015). *PostCapitalism: A Guide to Our Future*. Concept, 8(2). Available at: <https://concept.lib.ed.ac.uk/article/view/2463>
- Moscardo, G. (2008) "Analyzing the Role of Festivals and Events in Regional Development", *Event Management*, Vol 11, No. 1-2, pp. 23-32. <https://doi.org/10.3727/152599508783943255>.
- Oppermann, M. (1993) "Tourism Space in Developing Countries", *Annals of Tourism Research*, Vol 20, No. 3, pp. 535-556. [https://doi.org/10.1016/0160-7383\(93\)90008-Q](https://doi.org/10.1016/0160-7383(93)90008-Q).
- Pfytzner, R. and Joerg K. (2016) "Quality of life of residents living in a city hosting mega-sport events: A longitudinal study", *BMC Public Health*, Vol 16, pp. 1-10. <https://doi.org/10.1186/s12889-016-3777-3>.
- Pritchard, A., Nigel M. and Irena, A. (2011) "Hopeful Tourism: A New Transformative Perspective", *Annals of Tourism Research*, Vol 38, No. 3, pp. 941-963. <https://doi.org/10.1016/j.annals.2011.01.004>.
- Reinartz, W., Haenlein, M. and Henseler, J. (2009) "An Empirical Comparison of the Efficacy of Covariance-Based and Variance-Based SEM", *Intern. J. of Research in Marketing*, Vol 26, pp. 332-344. <https://doi.org/10.1016/j.ijresmar.2009.08.001>.
- Ritchie, B. W., Chien, P. M. and Shipway, R. (2020) "A Leg(acy) to Stand On? A Non-Host Resident Perspective of the London 2012 Olympic Legacies", *Tourism Management*, Vol 77. <https://doi.org/10.1016/j.tourman.2019.104031>.
- Rogers, D. S., Anantha K. D., Antons, D. C., Munoz, P., Bai, X., Fragkias, M. and Gutscher, H. (2012) "A vision for human well-being: transition to social sustainability", *Current Opinion in Environmental Sustainability*, Vol 4, No. 1, pp. 61-73. <https://doi.org/10.1016/j.cosust.2012.01.013>.
- Romer, P. M. (1986) "Increasing Returns and Long-Run Growth", *The Journal of Political Economy*, Vol 94, No. 5, pp. 1002-1037. <https://doi.org/10.1086/261420>.
- Siles, D., García-Sánchez, A. and Vázquez-Méndez, M. M. (2024) "Social Sustainability in Music Festivals: The Case of Rock Imperium", *The International Journal of Social Sustainability in Economic, Social, and Cultural Context*, Vol 20, No. 1, pp. 83-100. <https://doi.org/10.18848/2325-1115/CGP/v20i01/83-100>.
- Söllner, M., Bitzer, P., Janson, A. and Leimeister J. M. (2017) "Process is king: Evaluating the performance of technology-mediated learning in vocational software training", *Journal of Information Technology*. <https://doi.org/10.1057/s41265-017-0046>.
- United Nations World Tourism Organization (UNWTO). (2007) *Davos Declaration on Climate Changes and Tourism - Responding to Global Challenges*. <https://doi.org/10.18111/unwtodeclarations.2007.17.02>.
- Waterman, S. (1998) "Carnivals for Elites? The Cultural Politics of Arts Festivals", *Progress in Human Geography*, Vol 22, No. 1, pp. 54-74. <https://doi.org/10.1191/030913298672233886>.

- Wetzels, M., Odekerken-Schröder, G. and Van-Oppen, C. (2009) "Using PLS Path Modelling for Assessing Hierarchical Construct Models: Guidelines and Empirical Illustration", *MIS Quarterly*, Vol 33, No. 1, pp. 177-195. <https://doi.org/10.2307/20650284>.
- Wilkinson, A., Hill, M. and Gollan, P. (2001) "The Sustainability Debate", *International Journal of Operations & Production Management*, Vol 21, No. 12, pp. 1492-1502. <https://doi.org/10.1108/01443570110410865>.
- Wong, K. K. (2013) "Partial Least Squares Structural Equation Modelling (PLS-SEM) Techniques Using SmartPLS", *Marketing Bulletin*, Vol 24. https://doi.org/10.1007/978-3-319-05542-8_15-2.
- Zifkos, G. (2015) "Sustainability Everywhere: Problematising the "Sustainable Festival" Phenomenon", *Tourism Planning & Development*, Vol 12, No. 1, pp. 6-19. <https://doi.org/10.1080/21568316.2014.960600>.

How Human Resources Management Practices Affect Employee Satisfaction and Motivation: A study in the Hospitality Sector

Susana Silva¹ and Márcia Gonçalves²

¹CEOS.PP, CITUR, ESHT, Instituto Politécnico do Porto, Vila do Conde, Portugal

²ESHT, Instituto Politécnico do Porto, Vila do Conde, Portugal

susanasilva@esht.ipp.pt;
41200058@esht.ipp.pt

Abstract: The employees' behavior in the hotel industry plays a fundamental role in customer satisfaction, as it directly affects the quality of the service provided to consumers. Several authors have highlighted employees as an essential resource for achieving business success in the hospitality sector. This study aims to understand the impact of Human Resource Management Practices in the hotel industry and their influence on employee motivation and satisfaction in the workplace, using a hotel group as a case study. A quantitative, cross-sectional, and correlational study was carried out by applying a questionnaire to 60 employees (30 women and 30 men) from a hotel group aged between 18 and 34. The data and hypotheses were tested using IBM SPSS 28.0. The results show that recruitment, training, performance evaluation, and reward management practices are related to the level of employee satisfaction. In turn, recruitment practices, performance evaluation, reward management, diversity and inclusion, and administration and control are related to employee motivation. The conclusion is that human resource management practices should be used to meet the needs of employees, promoting their satisfaction, motivation, and organisational commitment.

Keywords: Engagement, Motivation, Satisfaction, Human resources practices

1. Introduction

The recognition that human capital and its capabilities are an organisation's greatest competitive advantage has been growing because over time it has been understood that when human resources (HR) are properly managed, the organisation's objectives are achieved more quickly and more effectively. As hospitality is a sector where a large part of the consumer experience is based on customer service, the role of Human Resource Management Practices is even more crucial, as satisfied and motivated employees perform their job better (Nieves & Quintana, 2018).

Human Resource Management (HRM) is fundamental for the hotel industry, as this is a sector known for its low working conditions and intensive labour, it is important to understand how HRM acts on employee satisfaction, as the success of the organisation is based on communication between employees and guests (Otoo & Mishra, 2018). The literature has pointed to the role of various human resource management practices in employee satisfaction and motivation.

As the hotel industry has a high turnover rate due to employee dissatisfaction with working conditions, the application of HRM practices can positively influence the factors that cause employee dissatisfaction and thus also improve service quality (Heimerl et al., 2020).

This study aims to characterize the employees' perception about the HRM practices implemented in the hotel industry and their influence on employee motivation and satisfaction in the workplace, using a hotel group as a case study.

This paper is organised into four sessions, first it is presented the literature review, after the methodology applied in the study, then the results are presented and finally the conclusions, limitations of the study, and future work.

2. Literature Review

2.1 Human Resources Management

The hotel industry is mostly characterized by its intangibility and dependence on interaction between employees and guests. Thus, HRM is responsible for linking organisational objectives to employee satisfaction, so that service is provided in an excellent and consumer-oriented manner.

HRM is used to communicate desired behaviours, shape and reinforce performance, thus contributing to the achievement of the organisation's objectives. It is also a way of reducing costs, as when practices such as recruitment and selection, retention, engagement, inclusion and performance management are developed and applied, they can result in a reduction in the turnover and training of new employees. HR planning,

inclusion, engagement, and development activities help with organisational sustainability. Identifying needs and developing employees is beneficial for organisational longevity (Donovan, 2019).

HRM practices are associated with actions that increase the knowledge, skills, and abilities of employees, in this case in the hotel industry, so that they can behave more entrepreneurially. Thus, when employees acquire this behavior, they have the ability to communicate successfully with consumers and satisfy their needs more easily, so that each consumer is treated uniquely. Therefore, if the hotel industry wants to offer high-quality services, it must have confidence in its employees and find out what factors encourage them to offer the best service to customers (Surucu & Sesen, 2019).

The creation and innovation of HRM practices are vital for the hotel industry, especially in the luxury market. Employees guided by good HRM practices have the skills, knowledge, and motivation they need to consistently perform their job to meet the expectations of guests in this hotel segment. HRMPs must be constantly innovating so that they can keep up with the changing needs of guests over time and also improve and accompany employees. That said, it is understood that the implementation of these practices positively affects the well-being and personal development of employees, which in turn affects the long-term performance of the organisation (Pang, 2020).

HRM can influence the success and competitive edge of an organisation. In this way, its relevance is notorious, since hospitality is a labour-intensive service since the human factor is one of the main factors responsible for the success of the organisation since it is a service based on communication between employees and guests (Otoo & Mishra, 2018).

2.2 Employee Satisfaction

Locke (1969), cited in (Elrehail et al., 2020), defines job satisfaction as a pleasant emotional state at work resulting from the evaluation of one's work, having achieved or having tried to achieve its values. Employee satisfaction is increasingly becoming a relevant factor in the workplace, as it is linked to productivity, organisational performance, loyalty to the organisation, personal and professional fulfillment. It is possible to see that greater job satisfaction translates into good performance on the job (Veloso et al., 2021).

According to Pancasila et al. (2020), if the employee's performance is excellent, it is likely that the organisation's performance will also be excellent. Aamodt (2012), cited in Pancasila et al. (2020), states that the organisation's motivation encourages the employee's work spirit to give their best. If employees feel motivated, then they will also feel satisfied at work and will work more enthusiastically to improve their performance.

HR planning influences employee satisfaction because it allows them to participate in the organisation of their careers and employment decisions. Good planning motivates employees, influencing their happiness and making them more productive (Elrehail et al., 2020).

The organisation must pay attention to employees' needs, expectations, and skills. Job satisfaction can be achieved through motivational factors such as rewards, security, interpersonal influence, and working environment conditions that generate opportunities for self-development and improvement (Pancasila et al., 2020).

For Macaulay Onovughak et al. (2022) turnover is one of the biggest reasons for inefficiency in the performance of organisations. The hotel industry is a sector where turnover is high, due to employee dissatisfaction caused by stress and work overload. It is therefore important to prevent turnover and promote employee loyalty. A satisfied employee has a positive influence on service quality, customer relations and customer satisfaction, the performance of the organisation, resulting in a higher quality service (Heimerl et al., 2020).

Between 1957 and 1966, Herzberg developed the Two Factor Model of Motivation", based on research into the sources of job satisfaction and dissatisfaction. One of the factors was "motivational", which relates to the content of the job and consists of the need for fulfillment, interest in the work, responsibility and opportunities for advancement. The second factor was "hygiene", which was more related to the work context, including things like salary and working conditions. These factors serve to prevent dissatisfaction and not to generate motivation. This model emphasizes the need to consider both financial and non-financial factors when developing a reward system (Armstrong & Taylor, 2020).

2.3 Motivation

Armstrong & Taylor (2020) call motivation “the force and direction of behavior and the factors that influence people to act in certain ways” (p.169). It also reinforces that people are motivated when they anticipate that a certain action can lead to the achievement of a goal and a valued reward, a reward that satisfies their needs and desires. Motivation at work encourages employees to do their jobs to the best of their ability and to achieve both personal and organisational goals. It is a way of encouraging individuals to act in a certain way to achieve the organisation's goals (Håvold and Håvold, 2019, cited in Yamamoto et al., 2023).

A company's organisational climate influences employee motivation and work performance. It should be considered that employees work to satisfy their material and psychological needs, so motivation drives the desire to improve their performance at work. Motivation can be determined by measuring employee satisfaction or performance. In this way, supervisors must take into account that employees' needs are different from one another so that they can make the work environment more motivating and thus achieve higher results (Rusu & Avasilcai, 2014).

As the hotel industry is a customer service sector, it is even more important that employees feel motivated, as the frontline employee has an immediate impact on customer satisfaction (Chien et al., 2020).

Motivation in the workplace can be provided by the quality of leadership and various forms of recognition or rewards. These factors contribute to the growth of self-motivation and encourage individuals to use their skills to the full and perform their jobs to the best of their ability (Armstrong & Taylor, 2020).

3. Methodology

A cross-sectional, descriptive, and correlational quantitative study was performed to achieve the general objective of understanding the impact of HRM practices in the hotel industry and their influence on employee motivation and satisfaction in the workplace, using a hotel group as a case study. More specifically, we aimed to identify the HRM practices used in a hotel, to understand, from the employee's point of view, what impact the HRM practices implemented have on their satisfaction and motivation, and to identify the challenges faced by HRM in a hotel.

The instrument used for data collection was a survey with 47 questions organised into 4 sections. Section 1 had five sociodemographic questions, section two had 12 questions related to the HRM practices implemented in the hotel, section three had 21 questions about employee satisfaction, and section four had nine questions related to motivation. We had closed questions answered dichotomously or using a 5 point Likert scale.

Our population were the employees of a five-star hotel. The sample had 60 persons (30 female and 30 male). Regarding their age, 16 had between 18-24 years old (26.7%), 20 (33.3%) between 24-28, and 18 (30%) between 29-40 years old. Fifteen participants (25%) had high school graduation and 45 (75%) had under graduation courses. Concerning their seniority in the hotel, 22 participants (36.7%) were in this hotel between 1-3 years, and 16 (26.7%) were working in the hotel for less than three years.

For the study dissemination, it was sent an e-mail explaining the objectives of the study and the link for the online survey for all the professional emails. Data collection occurred between September and October 2023.

Data were analyzed statistically with IBM SPSS 28.0. Descriptive statistics were calculated to all variables.

To analyze the possible correlation between the HRM practices, the satisfaction level of the employees, and motivation several Spearman correlations were calculated. Confidence level used was 95%. All ethical procedures were considered during this study.

4. Results

This section presents the main results of our study organised by human resources practices, employee satisfaction, and motivation

Regarding the employee perceptions of Human Resources Management of the Hotel 20% referred to be satisfied/very satisfied. Employees said that the reasons they were attracted to the hotel were “Possibility of Career Advancement” (58.3%), “Good Working Conditions” (45%), “Good Reward System” (31.7%), “Stability and Security” (23.30%), and “Above Average Salary” (18.3%).

Moreover, several questions were asked to characterise how the hotel implements Human Resources Practices. For the recruitment and selection process, 98% referred to an individual strategy as the only strategy

used. Only 50% of the participants referred to the possibility of doing training and development in the hotel. Regarding performance assessment, 93% of the participants referred to having quarterly assessments made by their superiors and themselves. For additional benefits, 92% referred to having a bonus, and 30% referred to health insurance. The welcoming process was assessed positively by 82% of the participants. Moreover, 92% referred to the absence of stereotypes and discrimination.

Several questions were made to characterise employees' satisfaction ranging from 1 Totally disagree to 5 Totally agree (table 1). 82% of employees referred to be satisfied with their jobs.

Table 1: Frequencies for the variable "satisfaction level of employees"

Itens	Frequencies									
	1		2		3		4		5	
	n	%	n	%	n	%	n	%	n	%
I am satisfied with the salary I receive considering the duties I perform	7	11,67	9	15	16	26,7	28	46,7	-	-
I feel satisfied with my workplace because, overall, it offers a balanced reward system	4	6,7	6	10	18	30	24	40	8	13,3
I feel like a valuable resource for the hotel	-	-	7	11,7	14	23,3	22	36,7	17	28,3
I am satisfied with my working hours	1	1,7	0	0	25	41,7	31	51,7	3	5
When making the timetable, the organisation takes my needs into account	1	1,7	6	10	19	31,7	21	35	13	21,7
I feel satisfied with my professional and personal life, in terms of reconciling the two.	-	-	7	11,7	23	38,3	25	41,7	5	8,3
I'm satisfied with the working conditions I'm given to do my job effectively.	1	1,7	10	16,7	13	21,7	28	46,7	8	13,3
I feel satisfied with the recognition I get for my work	1	1,7	12	20	21	35	19	31,7	7	11,7
I feel that the levels of my participation and involvement in decision-making are satisfactory	2	3,3	7	11,7	16	26,7	26	43,3	9	15
I feel satisfied with the tasks I perform	-	-	-	-	14	23,3	35	58,3	11	18,3
When I am away from work, I can take my mind off my professional problems	3	5	8	13,3	13	21,7	22	36,7	14	23,3
My proposals to make the work more efficient and effective are considered	1	1,7	7	11,7	24	40	21	35	7	11,7
I feel satisfied enough to want to learn more tasks	-	-	-	-	17	28,3	31	51,7	12	20
I feel listened to by my hierarchy	1	1,7	5	8,3	16	26,7	20	33,3	18	30
Sinto-me satisfeito/a com os colegas de trabalho.	3	5	-	-	9	15	29	48,3	19	31,7
I feel satisfied with the rewards and benefits I receive from the hotel where I work	1	1,7	7	11,7	18	30	26	43,3	8	13,3

To analyze the relationship between Human Resources Practices and employee satisfaction several Spearman Correlation tests were made. We found significant correlation in the use of training ($r=.367$, $p=.023$), performance assessment ($r=.674$, $p=.014$), and additional benefits ($r=.872$, $p=.031$). All of these human resources practices are related to higher satisfaction levels.

To understand the employees' motivation several questions were asked. Table 2 summarizes the participants' answers. 70% of the participants said that they were motivated.

Table 2: Frequencies for the variable “motivation”

Itens	Frequencies									
	1		2		3		4		5	
	n	%	n	%	n	%	n	%	n	%
The hotel takes care to keep its employees happy and in this way manages to have more motivated and productive workers.	4	6,7	9	15	22	36,7	21	35	4	6,7
I feel that the hotel where I work cares about employee motivation	5	8,3	9	15	19	31,7	25	41,7	2	3,3
If I had more professional rewards, I would feel more motivated.	-	-	4	6,7	6	10	24	40	26	43,3
My superiors influence my motivation levels.	-	-	1	1,7	6	10	35	58,3	18	30
I feel motivated by my job	-	-	4	6,7	15	25	27	45	14	23,3
I feel motivated to do everything in my power to exceed the objectives	-	-	2	3,3	15	25	32	53,3	11	18,3
Generally, I feel motivated in my workplace	-	-	7	11,7	13	21,7	28	46,7	12	20

To analyze the relationship between Human Resources Practices and employees’ motivation several Spearman Correlation tests were made. We did not find any statistical correlation.

5. Conclusions

The aim of this study was to understand how the Human Resources Management Practices applied in a hotel, affect employee satisfaction and motivation.

It was possible to see that Human Resource Management deals with how people should be managed, i.e. people are increasingly seen as the most important element of an organisation's strategy. Human Resource Management should be used to shape the behaviour of employees so that they feel satisfied at work and thus achieve the organisation's objectives (Nieves & Quintana, 2018).

In hospitality, being a labour-intensive service, it is essential that employees feel satisfied and motivated in their role, otherwise, guests may not receive the experience they should.

When Human Resource Management Practices are applied correctly, human resources are managed in such a way as to attract, develop, motivate, and retain employees, instilling in them the purpose of achieving the organisation's objectives. Our results are in line with previous research (cf. Pang, 2020; Surucu & Sesen, 2019; Yamamoto et al., 2023).

It is also understood that the tourism industry is known for its precarious working conditions, so it is important to counter this trend and offer employees the necessary conditions to develop satisfaction, commitment, and motivation. Employee attitudes are shaped by the organisation in which they work.

From the results, it is clear that the organisation needs to develop its strategy since although the majority of employees feel satisfied and motivated in the workplace, they identify some more negative aspects (cf. Pancasila et al, 2020; Veloso et al., 2021). These practices focus on financial rewards and neglect investment in training and development. Employees feel satisfied with their value, and the tasks they perform and are happy enough to want to learn new tasks. Although the employees' level of motivation is satisfactory, they would be more motivated if the monetary rewards were higher (Rusu & Avasilcai, 2014).

Some limitations emerged during this research. The main limitation was the reduced sample. Therefore, the results could not be generalized. On the other hand, we assessed only the employees’ perspective, but we cannot compare it with the practices implemented by the hotel or the aim of the organisation. Future research should have larger samples and consider other organisational perspectives.

Despite the limitations identified, this study gives important insights into the relevance of human resources practices for satisfaction and employee motivation. Hotels should recognize the relevance of implementing other human resources practices and communicate them in a clear way.

Acknowledgement

"This work is financed by Portuguese national funds through FCT - Fundação para a Ciência e Tecnologia, under the project UID/05422: Centre for organisational and Social Studies of Polytechnic of Porto."

References

- Armstrong, M., & Taylor, S. (2020). *Armstrong's handbook of human resource management practice*. Kogan Page Limited. <https://doi.org/10.4135/9780857021496>
- Asheq, A. Al, Islam, R., & Ahmed, S. (2022). Analysis of Employee Motivation in the Service and Manufacturing Organisations: The Case of a Developing Economy. *International Journal of Business and Systems Research*, 1(1), 1. <https://doi.org/10.1504/ijbsr.2022.10039933>
- Chien, G. C. L., Mao, I., Nergui, E., & Chang, W. (2020). The effect of work motivation on employee performance: Empirical evidence from 4-star hotels in Mongolia. *Journal of Human Resources in Hospitality and Tourism*, 19(4), 473–495. <https://doi.org/10.1080/15332845.2020.1763766>
- Donovan, D. O. (2019). *HRM in the Organisation : An Overview*. Springer International Publishing. <https://doi.org/10.1007/978-3-030-13229-3>
- Elrehail, H., Harazneh, I., Abuhjeeleh, M., Alzghoul, A., Alnajdawi, S., & Ibrahim, H. M. H. (2020). Employee satisfaction, human resource management practices and competitive advantage: The case of Northern Cyprus. *European Journal of Management and Business Economics*, 29(2), 125–149. <https://doi.org/10.1108/EJMBE-01-2019-0001>
- Heimerl, P., Haid, M., Benedikt, L., & Scholl-Grissemann, U. (2020). Factors Influencing Job Satisfaction in Hospitality Industry. *SAGE Open*, 1–12. Retrieved from <https://journals.sagepub.com/doi/pdf/10.1177/2158244020982998>
- Macaulay Onovughak, A., Omo-Amen, L., & Ebibai, G. E. (2022). Human resource management and firm performance: evidence from hotel and tourism quoted companies in Nigeria. *Innovative Journal of Marketing Management*, 10(3).
- Nieves, J., & Quintana, A. (2018). Human resource practices and innovation in the hotel industry: The mediating role of human capital. *Tourism and Hospitality Research*, 18(1), 72–83. <https://doi.org/10.1177/1467358415624137>
- Otoo, F., & Mishra, M. (2018). Impact of Human Resource Management (HRM) Practices on Hotel Industry's Performance: The Mediating role of Employee Competencies. *Indian Journal of Commerce & Management Studies*, IX(2). <https://doi.org/10.18843/ijcms/v9i2/03>
- Pancasila, I., Haryono, S., & Agus SULISTYO, B. (2020). Effects of Work Motivation and Leadership toward Work Satisfaction and Employee Performance: Evidence from Indonesia. *Journal of Asian Finance, Economics and Business*, 7(6), 387–397. <https://doi.org/10.13106/jafeb.2020.vol7.no6.387>
- Pang, J. M. (2020). A conceptual framework for measuring innovative human resources practices in luxury and upscale hotels in Singapore. *Asia Pacific Journal of Advanced Business and Social Studies*, 6(2), 44–53.
- Rusu, G., & Avasilcai, S. (2014). Linking Human Resources Motivation to Organisational Climate. *Procedia - Social and Behavioral Sciences*, 124(October 2016), 51–58. <https://doi.org/10.1016/j.sbspro.2014.02.459>
- Surucu, L., & Sesen, H. (2019). Entrepreneurial behaviors in the hospitality industry: Human resources management practices and leader member exchange role. *Revista de Cercetare Si Interventie Sociala*, 66, 114–132. <https://doi.org/10.33788/rcis.66.8>
- Veloso, C. M., Sousa, B., Au-Yong-Oliveira, M., & Walter, C. E. (2021). Boosters of satisfaction, performance and employee loyalty: application to a recruitment and outsourcing information technology organisation. *Journal of Organisational Change Management*, 34(5), 1036–1046. <https://doi.org/10.1108/JOCM-01-2021-0015>
- Yamamoto, G., Dalonso, Y., Ferreira, F., & Duprat, M. (2023). Gestão estratégica de recursos humanos em hotelaria e turismo : uma revisão sistemática da literatura. *Revista Turismo: Estudos & Práticas (RTEP)*, 12(2), 1–18.

Erasmus Mobility: Fostering Cultural Sensitivity Through Youth Exchange

Goretti Silva¹, Mariana Oliveira^{1,2}, Alexandra Correia^{1,2} and Maria José Brito¹

¹Polytechnic University of Viana do Castelo, Viana do Castelo, Portugal

²CiTUR - Center for Tourism Research, Development and Innovation, Coimbra, Portugal

goretti@estg.ipvc.pt

catia.oliveira@estg.ipvc.pt

acorreia@estg.ipvc.pt

mjazevedo@estg.ipvc.pt

Abstract: The recent massive expansion of Tourism has generated intense debate, generally expressing support but, at times, voicing displeasure more than is desirable. This underscores the need for a discussion on sociocultural sustainability. The CultSense project ("Sensitizing Young Travellers for Local Cultures") addresses these issues, identifying ways to foster young travellers' cultural sensitivity through education. Students are the next generation of travellers, and Tourism's future and role as a sustainability driver heavily relies on them and their attitudes. A specific context that illustrates the opportunities provided by education to approach these matters is the European Union's Erasmus+ programme. This research presents the findings of a study undertaken among Erasmus students, at different higher education institutions across specific European countries (namely Portugal, Spain, and Finland). Following a quantitative survey-based methodological approach, this work was designed to achieve five key objectives: analysing students' behaviours as visitors at the host community using the Cosmopolitan scale (Saran and Kalliny, 2012), exploring their integration experiences, identifying their perceived benefits of the experience – both for themselves and the local communities, understanding students' perceptions of their impact on the host community and local culture, and examining the likelihood of students' perceived benefits affecting their willingness to recommend the host country/region. According to the findings, the highest-rated perceived benefits among Erasmus students were experiencing everyday life, broadening horizons, and developing a thirst for travelling, which strongly align with the concept of cosmopolitanism itself. Students have developed a sense of belonging to the community, particularly among those who completed their mobility in Portugal, as indicated by their more positive outcomes throughout the experience as a visitor. Students overwhelmingly disagreed with the assumption that Erasmus participants hurt local culture and, instead, they viewed their contributions positively. Erasmus students' positive perceptions during their stay in a foreign country will encourage them to spread the word and make them critical informants about local culture and traditions when they return home. Therefore, this study suggests that investing in more positive Erasmus experiences will create a ripple effect, transforming temporary students into long-term ambassadors, who can advocate for more responsible and culturally aware tourism practices.

Keywords: Cosmopolitanism, Cultural sensitivity, Erasmus+ programme, Mobility, Sustainable tourism, Youth exchange

1. Introduction

Tourism is widely recognized as a powerful driver of economic development and societal promotion. However, it also represents challenges for host communities, impacting them both positively and negatively, and affecting the lives of the residents (Moreira Lima, 2012). Particularly when situations of high visitor concentration are observed in cities such as Amsterdam, Barcelona, Dubrovnik, and Venice, this phenomenon has resulted in complaints and dissatisfaction among residents (Alexis, 2017; Hughes, 2018; Cassinger, 2019; Hempen, 2020). Consequently, the need to investigate and develop strategies that increase visitors' awareness of local cultures, fostering mutual understanding and appreciation between tourists and residents, is imperative (Marques, 2021).

An educational mobility context such as the European Union's Erasmus+ programme represents an opportunity for travel and intercultural exchange that can significantly impact not only participants but also host communities. The youth embody an important demographic segment in this context. Despite the documented benefits of youth travel, research on its impact on host communities remains limited (UNWTO and WYSE, 2011). Furthermore, young travellers are often perceived as merely budget-conscious consumers, which has led many tourism impact studies to overlook their potential as agents of positive change (UNWTO and WYSE, 2008). This oversight is particularly noteworthy as the youth can have a significant impact on tourism demand due to their potential to shape new perspectives within society and the tourism industry alike (Caber et al., 2020). The good practices adopted by young travellers will be maintained in their adult lives, and they will exert an influential effect on their social and professional circles, leading to better tourism practices, now and in the future. This paper, within the scope of the CultSense project, addresses the perceptions of Erasmus students participating in a mobility programme, at different higher education institutions in specific European countries (namely Portugal, Spain, and Finland). The conceptual framework underlying this research suggests that perceptions are

likely to be different according to host countries, and to what students have experienced there; moreover, cosmopolitanism, being more common among students participating in mobility programmes, is also likely to be positively correlated with specific cultural experiences and perceived benefits, for both young travellers and host communities. These hypotheses will be tested.

In addition to this introductory chapter, this paper is organized into four different sections. The literature review focuses on cultural sensitivity in tourism and the role of educational mobility programmes, particularly Erasmus+, within the framework of cosmopolitanism. The methodology adopted is presented in the subsequent section, followed by an analysis and discussion of the results. Finally, the concluding section examines the key findings, acknowledges limitations, and outlines directions for future research.

2. Literature Review

2.1 Cultural Sensitivity and Tourism

Globalization has increased interdependence among people from diverse cultural backgrounds, making the development of intercultural competencies essential (Pintor and Premazzi, 2024). Understanding and respecting different cultures has become crucial in effective intercultural communication (Chen and Starosta, 1998/1999).

Several models have been proposed to study the development of cultural sensitivity. Bennett (1986) suggests that developing cultural sensitivity requires not only knowledge and skills but also self-reflection, leading to new understanding, awareness, and attitudes. Papadopoulos, Tilki, and Taylor's (1998) Model of Cultural Competence Development, although originally designed for the health and social care domain, facilitates understanding of the concept. This model outlines four stages: cultural awareness, cultural knowledge, cultural sensitivity, and cultural competence. Cultural awareness, as the base of communication, involves the ability to step back from our own perspective and become aware of our cultural values, beliefs, and perceptions (Quappe and Cantatore, 2005). This awareness becomes crucial when interacting with people from other cultures, as individuals see, interpret, and evaluate things differently based on their cultural background.

While the concept of cultural sensitivity has been extensively discussed in fields such as health sciences, in particular nursing (Marques et al., 2023), it remains inadequately conceptualized in tourism studies (Viken et al., 2021). From a tourism perspective, cultural sensitivity is conceptualized as a disposition that can be enhanced and mobilized through reflection on one's own pre-assumptions, cultural norms, and values (Viken et al., 2021). It is a disposition, awareness, mindset, and competence that can lead to more positive (tourism) experiences (Marques and Engberg, 2022) and can be learned or developed (Marques and Engberg, 2022; Viken et al., 2021). Cultural sensitivity in travel is understood at the intersection of intercultural competence, cosmopolitanism, and sustainability (Marques and Engberg, 2022; Marques et al., 2023). For the purpose of this paper, the concept and implications of cosmopolitanism will be adopted, along with its relationship to students' integration experience and their perceived benefits of the Erasmus+ programme.

Considering individuals' behaviour transcending individual cultural and geographical contexts, cosmopolitanism has gained prominence amid globalization and can be applied to diverse situations and contexts. At its core, cosmopolitanism is about culture and the self (Saran and Kalliny, 2012). It represents an orientation and a cultural disposition towards engaging with the Other, involving an intellectual and aesthetic stance of openness regarding peoples, places, and experiences from different cultures (Hannerz, 1990; Saran and Kalliny, 2012, Tomlinson, 1999).

2.2 Education, Cosmopolitanism and Mobility Programmes

(Higher) Education plays a crucial role in equipping young people with tools to navigate cultural differences and engage in healthier and more effective interactions within the tourism context (Marques and Oliveira, 2023). Study abroad experiences, in particular, help students enhance their observational skills, build tolerance for ambiguity and uncertainty, and adapt more successfully to new cultural settings (Sobkowiak, 2019). These educational programmes not only expose students to different cultural environments but also challenge them to expand their worldviews by engaging with new perspectives.

Moreover, intercultural experiences stimulate students to engage in self-reflection, particularly regarding their own cultural identities, which contributes significantly to their growth in self-awareness. As students interact with diverse cultures, they are prompted to compare their home culture with that of their host country, which encourages the development of greater understanding of both their own and others' cultural norms (Sobkowiak, 2019).

Since 1987, the European Union Erasmus+ programme has been helping students gain skills through study or training abroad, and, at the same time allowing them cross-cultural learning opportunities (Sobkowiak, 2019). Besides the well-acknowledged benefits in terms of educational, professional, and personal growth, Erasmus students will learn about the host country, its culture and people, and have rather different experiences, as visitors in a foreign country (Sobkowiak, 2019; Silva et al., 2022). Exposure to the host culture will push students to reassess and adjust their personal values when faced with unfamiliar social and cultural contexts (Lesjak et al., 2015). This process will, in turn, enhance their ability to communicate across cultural boundaries and develop a deeper appreciation for diverse cultural perspectives (Asoodar et al., 2017). In addition, surrounded by other Erasmus students, they will have many opportunities to get involved in intercultural collaborations (Sobkowiak, 2019).

The impact of these educational experiences extends far beyond individual participants to significantly influence host communities (Silva et al., 2022). Educational experiences in which the youth come to appreciate the places and cultures they visit will minimise the negative impact of tourism and create a more balanced relationship between visitors and residents: as tourists will appreciate more the places they visit and they will be more appreciated by the people who live in those places (Richards and Marques, 2018).

Research linking cosmopolitanism and Erasmus students (e.g. Salomão et al., 2022; Cicchelli, 2011; Fidolini, 2013; Bilecen, 2016) reveals a complex relationship between mobility, cultural exchange, and the development of cosmopolitan identities. Despite the significant role of international mobility programmes in enhancing intercultural competence (Pintor and Premazzi, 2024), recent research on the Erasmus+ programmes and cosmopolitanism presents intriguing and seemingly contradictory results. On the one hand, a study by Salomão et al. (2022), exploring the relationship between consumer cosmopolitanism and the decision to enroll in the Erasmus+ programme, indicates that higher levels of consumer cosmopolitanism actually decrease the likelihood of students enrolling in the programme. On the other hand, a study conducted by Cicchelli (2011) with French Erasmus students, analysing how Erasmus students develop a cosmopolitan relationship with the world, highlights how these students developed a broader understanding and acceptance of diverse cultures. Fidolini (2013) discusses Cicchelli's work on how travel experiences, particularly through the Erasmus+ programme, contribute to the cosmopolitan socialization of European youth. The research underscores the importance of these experiences in shaping a transnational view of cultural processes and aiding the transition of youth into adulthood with a cosmopolitan outlook.

Moreover, Cicchelli (2013) emphasized the role of exchange programmes reinforcing European mobility among students, fostering a sense of European identity and mutual understanding. Bilecen's study (2016) focuses on international doctoral students in Germany and how their study abroad experiences foster cosmopolitan identifications. The research highlights the value these students attribute to cultural differences and their ability to navigate multiple cultural perspectives, a phenomenon termed "multifocality". Flexibility and the aptitude to adapt to various cultural contexts are identified as key competences developed through these experiences.

3. Methodology

This study adopted a quantitative approach, combining secondary data analysis through literature review with primary data collection. An online survey was conducted using the Qualtrics platform, between March 31 and May 23, 2023. The survey targeted incoming Erasmus students participating in mobility programmes at higher education institutions across specific European countries, namely Portugal, Spain, and Finland.

3.1 Research Questions and Questionnaire Development

The questionnaire was developed through modifications to the CultSense survey (CSS) (Marques et al., 2023), incorporating validated scales from multiple sources. The survey includes different aspects of cultural sensitivity, such as intercultural competence, cosmopolitanism, travel benefits, and perception of interactions (Marques and Oliveira, 2023). For the purpose of this paper, only a selection of variables was considered, namely the scale of cosmopolitanism (Saran and Kalliny, 2012), as well as elements from the WYSE survey (2018). Additional analysis and further exploration of the survey results will be discussed in other publications.

Prior to distribution, the questionnaire, which was applied in English, was sent to the Erasmus coordinators of the universities involved in the CultSense project, to ensure clarity and relevance of the questions, along with agreement. The survey link was emailed to incoming Erasmus students via the Erasmus coordinators at the participating universities.

The sections of the questionnaire whose results will be analysed in this paper are as follows:

- Participant Information: collects data on participants' gender, nationality, type of study programme, mobility period, area of studies, and home and host universities;
- Cosmopolitanism Scale (COSMOSCALE): a unidimensional six-item scale (likert type from 1 - Strongly Disagree to 5 - Strongly Agree), as proposed by Saran and Kalliny (2012) to measure cosmopolitanism and adopted in various tourism studies (Ewers and Shockley, 2023; Morán-Huertas et al., 2021; Zulkifile and Aziz, 2023);
- Integration Experience: question focused on the students' experiences during the process of integration within their Erasmus mobility, through 6 items (likert-type scale from 0=no contact at all to 10=a lot of contact);
- Students' perceived benefits of the Erasmus mobility experience, through 11 items (likert-type scale from 1 – Strongly disagree to 5 – Strongly agree);
- Students' perceptions of Erasmus students' impact on the host community and local culture, through 3 items (likert-type scale from 1 – Strongly disagree to 5 – Strongly agree);
- Advocacy and Promotion: students' likelihood to recommend their host country to others upon returning home.

3.2 Data Analysis and Respondents' Profile

Data was analysed through Qualtrics and additional analyses were performed with SPSS 29, namely descriptive and inferential analyses. Kruskal-Wallis' tests were conducted to compare results among host countries, and Spearman's tests were used to test the hypothesis of a relationship between cosmopolitanism levels and both integration experiences and perceived benefits.

The survey yielded 53 valid questionnaires, with a sample predominantly composed of female Erasmus students (69.8%), attending courses in Portugal (49%), Spain (15%), Finland (26.4%), and others (9.4%). Most were experienced travellers, as 62.27% had travelled abroad more than four times over the previous five years.

The respondents' educational backgrounds were very diverse (e.g. Engineering, Computer Science, Psychology, Social Services, Food Science, Arts and Culture, Media Communication), being Tourism and Leisure the most frequent courses (24%), followed by Business Administration (16%).

4. Results and Discussion

4.1 Cosmopolitanism

The COSMOSCALE (Table 1), used to measure cosmopolitan attitudes, demonstrated high reliability in this study ($\alpha = 0.813$), consistent with Saran and Kalliny's original study ($\alpha = 0.78$) and prior studies (e.g. Morán-Huertas et al., 2021: $\alpha = 0.84$). The table presents the results to statements measuring cosmopolitanism, including willingness to talk and learn about other cultures and the importance of having favourable views of other communities to reduce global conflict (Saran and Kalliny, 2012). The results indicate that Erasmus students show high levels of openness and respect towards diverse cultures. The mean scores on items such as "I think it's good to spend time with people willing to talk and learn about other cultures" ($M = 4.66$) and "I think if people had a positive attitude towards other communities, there would be less conflict in the world" ($M = 4.68$) suggest a strong inclination towards intercultural engagement.

Table 1: Results of the cosmopolitanism scale (COSMOSCALE) (n = 50)

Statements	Min.	Max.	M	St. Dev.	Cronbach's α
I think it's good to spend time with people who are willing to talk and learn about other cultures.	3.00	5.00	4.66	0.557	0.813
I think I respect other people's culture the way I respect mine.	2.00	5.00	4.62	0.697	
I think if people had a positive attitude towards other communities, there would be less conflict in the world.	3.00	5.00	4.68	0.513	
I think that to be successful one needs to be able to use materials, information, knowledge, etc. from other cultures.	3.00	5.00	4.42	0.673	
I am ready to learn about other cultures through listening, observing, thinking, and reflecting.	3.00	5.00	4.66	0.626	
I think reading about world events is worthwhile.	2.00	5.00	4.44	0.705	

Statements	Min.	Max.	M	St. Dev.	Cronbach's α
Min.: minimum; Max.: maximum; M: mean; St. Dev.: Standard Deviation					

Source: Author's own elaboration.

Kruskal-Wallis' test results (Table 2) reveal no statistically significant differences between host countries ($p > 0.05$).

Table 2: Kruskal-Wallis' test results of COSMOSCALE between host countries

	n	M	Md	MR
COSMOSCALE				
Portugal	25	27.32	29.00	26.26
Finland	8	27.33	27.50	29.75
Spain	12	28.63	29.00	23.92
Others	5	26.80	28.00	18.70
Total	50			
Kruskal-Wallis' test results: $H=2.048$; $df=3$; $p=0.563$				
n: cases; M: mean; Md: median; MR: mean rank; df: degrees of freedom; p: significance level				

Source: Author's own elaboration.

4.2 Integration Experience

As shown in Table 3, Erasmus students had more contact with other Erasmus students ($M = 7.99$ on a 1-10 scale) than with local people ($M = 4.79$). They also had more contact with local food and drinks ($M = 6.43$) than with local customs ($M = 4.65$) or local dress code ($M = 3.80$). This suggests that although Erasmus students had some opportunities to interact with the local culture, they did not achieve complete immersion in the host community. However, their contact with foreign cultures through their international peers sensitized them and allowed them to learn about cultural diversity as stated in 4.3.

Table 3: Erasmus Students' integration within their Erasmus mobility (n = 53)

	Min.	Max.	M	St. Dev.	rho
Other Erasmus Students	1.00	10.00	7.99	2.27	.015
Local friends and family (whom you knew before the trip started)	0.00	10.00	2.00	2.87	.006
Local people (excluding family and friends)	0.00	10.00	4.79	2.78	-.137
Local food and drinks	0.00	10.00	6.43	2.93	-.024
Local dress code	0.00	10.00	3.80	2.95	-.081
Local customs	0.00	10.00	4.65	2.72	-.296*
rho = Spearman correlation; *Correlation is significant at the 0,05 level (2 tailed)					

Source: Author's own elaboration.

According to Spearman's test results (rho in Table 3), the students who demonstrate higher levels of cosmopolitanism have had less contact with local customs.

4.3 Perceived Benefits of the Erasmus Experience

The research identified significant personal development outcomes from the Erasmus experience. The Erasmus+ programme had notably impacted on students' personal growth, as illustrated in Table 4. Key areas of reported development included "broadening horizons" ($M = 4.47$) and "developing a thirst for traveling" ($M = 4.47$), highlighting the transformative potential of the Erasmus experience in fostering global-mindedness. High scores in "enhanced open-mindedness" ($M = 4.31$) and "increased tolerance" ($M = 4.20$) suggest that the programme encourages positive personal change.

Table 4: Perceived Benefits of the Erasmus Experience (n = 51)

Statements	Min.	Max.	M	St. Dev.	rho
I somehow contributed to the places I visited	1	5	3.71	0.923	.256
I gained a feeling of belonging	1	5	3.98	1.029	.102
I appreciated better the local culture	1	5	4.18	0.865	.476**
I interacted with local people	1	5	3.96	1.076	.170
I experienced everyday life	1	5	4.41	0.876	.246
I learnt a language	1	5	3.37	1.248	.169
I became more trusting	1	5	3.69	0.969	.160
I became more tolerant	3	5	4.20	0.722	.414**
I became more open-minded	2	5	4.31	0.860	.412**
I broadened my horizons	2	5	4.47	0.784	.008
I developed a thirst for travelling	2	5	4.47	0.731	.198
rho = Spearman correlation; **Correlation is significant at the 0,01 level (2 tailed)					

Source: Author's own elaboration.

According to Spearman's test results (rho in Table 4), there is a moderate positive association between the levels of cosmopolitanism and the perceived benefits. Students who demonstrate higher levels of cosmopolitanism also perceive that, to a greater extent, they have "appreciated better the local culture", "became more tolerant", and "became more open-minded".

As for differences between host countries and perceived benefits, the Kruskal-Wallis test revealed statistically significant differences ($p < 0.05$), only with regard to the statement "I gained a feeling of belonging." (Table 5). Students taking their mobility period in Portugal reported stronger feelings of belonging compared to their peers.

Table 5: Kruskal-Wallis' test results of the statement "I gained a feeling of belonging" between host countries

	n	M	Md	MR
I gained a feeling of belonging				
Finland	13	3.31	3.00	18.31
Spain	8	3.75	4.00	21.13
Portugal	25	4.44	5.00	32.34
Others	5	3.80	4.00	22.10
Total	50			
Kruskal-Wallis' test results $H=10.242$; $df=3$; $p=0.017$				

Source: Author's own elaboration.

4.4 Perceptions of Erasmus Students' Impacts on Host Community and Local Culture

According to Table 6, students overwhelmingly disagreed with the assumption that Erasmus participants hurt local culture and customs ($M = 1.58$) and instead viewed their contributions positively ($M = 4.26$).

Table 6: Perceptions of Erasmus Students' Impact on host community and local culture (n = 50)

	Min.	Max.	Mean	St. Dev.
Erasmus students hurt local culture and customs	1	5	1.58	0.87
Erasmus students do not mingle with local people	1	5	2.46	1.08
Erasmus students contribute positively to the places they visit	3	5	4.26	0.72
1 – Strongly disagree to 5 – Strongly agree				

Source: Author's own elaboration.

Kruskal-Wallis' test results reveal no statistically significant differences between host countries ($p > 0.05$), and none of these items correlate with Cosmopolitanism levels.

Moreover, 98% of participants expressed a willingness to recommend an Erasmus experience at their host city. This high advocacy rate suggests that Erasmus students are likely to become influential ambassadors for their host destinations, extending beyond mere information sharing to active promotion of cultural exchange and tourism development. Erasmus students' positive perceptions during their stay in a foreign country will encourage them to spread the word and make them critical informants about local culture and traditions when they return home. More than mere informants, Erasmus students emerge as excellent ambassadors of a given destination with the power to influence others positively.

5. Conclusion

This study highlights the multifaceted perceived impact of educational mobility programmes on both the students and the host communities. Participants overwhelmingly acknowledged the positive impact of their presence in host communities, firmly rejecting the assumption that Erasmus students disrupt local cultures. Instead, they recognized their willingness to suggest the country/region as a host destination, positioning themselves as potential ambassadors for cultural exchange, fostering tourism development and promoting cultural understanding. The reliability of the COSMOSCALE further validates the robust measures employed in assessing cosmopolitanism.

Overall, this study contributes to the ongoing discourse surrounding international education, highlighting the transformative potential of the Erasmus experience in shaping students' cultural sensitiveness and promoting global citizenship. The research reveals that Erasmus students serve as influential international promoters of their host countries and regions, while enriching their host communities through the exchange of knowledge, habits, and cultural practices. This bidirectional cultural sharing fosters mutual understanding and cultural wealth, creating a more interconnected and empathetic global community.

In the broader context of sustainable tourism development, this research underscores the potential of educational mobility programmes to shape a new generation of culturally sensitive and responsible global citizens. Education and cultural immersion are presented as powerful tools for creating a more understanding, sustainable, and interconnected world.

The implications of these findings are far-reaching, offering valuable insights for various stakeholders. Firstly, local authorities and governments should develop specific programmes to enhance Erasmus students as valuable assets for international promotion and cultural diplomacy. Secondly, higher education institutions should strengthen their role as cultural bridging institutions. By facilitating meaningful interactions between international students and local communities, universities can enhance both groups' cultural sensitivity and global awareness.

This study's insights into cultural sensitivity within the Erasmus programme are limited by a small sample size of 53 students, a demographic bias towards female participants, a focus on specific countries (Portugal, Spain, and Finland), and the biases inherent to self-reported data, which potentially affect the generalization of the findings.

Future studies could explore the long-term impacts of these exchanges, quantify the economic benefits to host regions, and investigate how to scale these positive effects to other forms of educational and cultural exchange programmes. Strategies that enhance immersion into local culture will ensure more holistic international experiences, mutually beneficial not only for students but also for the host communities.

Acknowledgements

This work was supported by the Project "CULTSENSE – Sensitizing young tourists for local cultures", number 2020-1-NL01-KA203-064791, funded by Erasmus+ programme.

References

- Alexis, P. (2017) "Over-Tourism and Anti-Tourist Sentiment: An Exploratory Analysis and Discussion", *Ovidius University Annals: Economic Sciences Series*, pp. 288-293.
- Asoodar, M., Atai, M.R., and Baten, L. (2017) "Successful erasmus experience: Analysing perceptions before, during and after Erasmus", *Journal of Research in International Education*, Vol 16, No. 1, pp. 80-97.

- Bennett, M.J. (1986) "A developmental approach to training for intercultural sensitivity", *International Journal of Intercultural Relations*, Vol 10, No. 2, pp. 179-196.
- Bilecen, B. (2016) "International Students and Cosmopolitanisms: Educational Mobility in a Global Age", In: Amelina, A., Horvath, K., Meeus, B. (eds) *An Anthology of Migration and Social Transformation*. IMISCOE Research Series. Springer, Cham, pp. 231-244.
- Caber, M., Albayrak, T. and Crawford, D. (2020) "Perceived value and its impact on travel outcomes in youth tourism", *Journal of Outdoor Recreation and Tourism*, 31, 100327.
- Cassinger, C. (2019) "Communicating anti-tourism – movement, protest, phobia", 28th Nordic Symposium on Tourism and Hospitality Research, Roskilde, Denmark.
- Chen, G-M. and Starosta, W.J. (1998/1999) "A review of the concept of interview of the concept of intercultural awareness", *Human Communication*, Vol 2, No. 1, pp. 27-54.
- Cicchelli, V. (2011) "Navigating the Intricacies of European Societies An Investigation into the Cosmopolitanism of Young People on the Move", *Quaderni di Sociologia*, pp. 107-120.
- Cicchelli, V. (2013) "The Cosmopolitan 'Bildung' of Erasmus Students' Going Abroad", In: Hébert, Y., Abdi, A.A. (eds) *Critical Perspectives on International Education. Comparative and International Education*, vol 15. SensePublishers, Rotterdam, pp. 205-208.
- Ewers, M. and Shockley, B. (2023) "Graduate migration, partisanship, and city preferences: An experimental approach to place-consonant migration decisions", *Population, Space and Place*, Vol 29, No. 8
- Fidolini, V. (2013) "Book Review: The Cosmopolitan Spirit: European Youth and the Broadening of the Mind through Travel (Originally L'Esprit Cosmopolite. Voyages De Formation Des Jeunes En Europe)". *The Sociological Review*, Vol 61, No. 3, pp. 630-632.
- Hannerz, U. (1990) "Cosmopolitans and locals in world culture", *Theory, Culture and Society*, Vol. 7, No. 2-3, pp. 237-251.
- Hempen, M. (2020) "Anti-Tourism Protests in European Cities: The influence of tourism critical encounters on young travellers' travel behaviour in the city of Barcelona", Master's Thesis, University of Groningen, Faculty Spatial Science.
- Hughes, N. (2018) "'Tourists go home': anti-tourism industry protest in Barcelona", *Social Movement Studies*, Vol 17, No. 4, pp. 471-477.
- Hurst, C.E., Grimwood, B.S., Lemelin, R.H., and Stinson, M.J. (2021) "Conceptualizing cultural sensitivity in tourism: A systematic literature review", *Tourism Recreation Research*, Vol 46, No. 4, pp. 500-515.
- Lesjak, M., Juvan, E., Ineson, E.M., Yap, M.H.T., and Axelsson, E.P. (2015) "Erasmus student motivation: Why and where to go?", *Higher Education*, Vol 70, pp. 845-865.
- Marques, L. (2021) "Why call it tourist season if we can't shoot them? – Towards the Utopian sensitized tourist", *Journal of Policy Research in Tourism, Leisure and Events*, Vol 15, No. 3, pp. 293-297.
- Marques, L. and Engberg, M. (2022) "Introduction: Cultural sensitivity in tourism encounters", in Engberg, M., Björkroth, P. and Marques, L. (eds.) *Creating Cultural Understanding Through Travel*. CultSense Case Collection. Arnhem: ATLAS / CultSense Project, pp. 5-10.
- Marques, L. and Oliveira, M. (2023) "Promoting Cultural Sensitivity in Higher Education: An Educational Approach to Sensitizing Young Travellers for Local Cultures", *Evolving Pedagogy*.
- Marques, L., Aulet, S., and Oliveira, M. (coord.) (2023) *CultSense Pedagogical Toolkit*.
<https://doi.org/10.17605/OSF.IO/E4RDW>
- Morán-Huertas, A.J., López, A., Mendoza, J. and Alarcon G. (2021) "Validez de contenido y confiabilidad de un instrumento de medición para determinar los factores psicosociológicos que impactan en la intención de compra de productos extranjeros en los consumidores mexicanos", *Innovaciones de Negocios*, Vol 18, No. 36, pp. 21-29.
- Moreira Lima, S. (2012) "As percepções dos residentes do papel do turismo no desenvolvimento da Ilha da Boavista", Master's Project, Universidade de Coimbra.
- Papadopoulos, I., Tilki, M. and Taylor, G. (1998) *Transcultural care: a guide for health care professionals*, Quay Publications, London.
- Pintor, S.P. and Premazzi, V. (2024) "The key role of intercultural competencies for effective integration: from theory to practice", *Quality Education for All*, Vol 1, No. 2, pp. 94-111
- Quappe, S. and Cantatore, G. (2005) What Is Cultural Awareness, Anyway? How Do I Build It?, [online],
http://www.insynctraining.eu/artikelen/what_is_cultural_awareness.pdf
- Richards, G. and Marques, L. (2018) *Creating synergies between cultural policy and tourism for permanent and temporary citizens*. UCLG.
- Salomão, M., Silva, S. and Côtó, J. (2022) "Studying abroad: the role of consumer cosmopolitanism in the enrolment decisions", *Young Consumers*, Vol 23, No. 4.
- Saran, A. and Kalliny, M. (2012) "Cosmopolitanism: Concept and measurement", *Journal of Global Marketing*, Vol 25, No. 5, pp. 282-291.
- Silva, G., Correia, A.I., Fernandes, C. and Oliveira, M. (2022) "Erasmus mobility as a culture-led experience: opportunities for sensitizing young travellers", in Engberg, M., Björkroth, P. and Marques, L. (eds.) *Creating Cultural Understanding Through Travel*. CultSense Case Collection. Arnhem: ATLAS / CultSense Project, pp. 70-78.
- Sobkowiak, P. (2019) "The impact of studying abroad on students' intercultural competence: An interview study", *Studies in Second Language Learning and Teaching*, Vol 9, No. 4, pp. 681-710.
- Tomlinson, J. (1999) "Globalization and culture". Cambridge, UK: Polity Press

- UNWTO and WYSE Travel Confederation (2008) *Youth Travel Matters – Understanding the Global Phenomenon of Youth Travel*, UNWTO, Madrid.
- UNWTO and WYSE Travel Confederation (2011) "The power of youth travel", AM Reports, 2.
- Viken, A., Höckert, E. and Grimw, B.S. (2021) "Cultural sensitivity: Engaging difference in tourism", *Annals of Tourism Research*, Vol 89.
- WYSE Travel Confederation (2018) *New Horizons IV. A Global study of the youth and student traveller*, WYSE Travel Confederation, Amsterdam.
- Zulkifle, A.M. and Aziz, K.A. (2023) "Determinants of Social Entrepreneurship Intention: A Longitudinal Study among Youth in Higher Learning Institutions", *Social Sciences*, Vol 12, No. 13.

What Skills are Required for Sustainable Leadership in Hospitality?

Susana Silva¹, Mónica Oliveira² and Cândida Silva³

¹CEOS.PP, CITUR, ESHT, Polytechnic of Porto, Vila do Conde, Portugal

²CITUR, ESHT, Polytechnic of Porto, Vila do Conde, Portugal

³CITUR, Algoritmi Center, ESHT, Polytechnic of Porto, Vila do Conde, Portugal

susanasilva@esht.ipp.pt

monicaoliveira@esht.ipp.pt

candidasilva@esht.ipp.pt

Abstract: The focus of Sustainability Leadership in tourism is on fostering individual development to facilitate adaptation to emerging technologies within complex and rapidly evolving environments, ultimately aiming to enhance performance and organizational effectiveness. Sustainable leaders prioritize collaboration, consensus-building, and support for team members to collectively achieve shared objectives, particularly those set by diverse stakeholders. This qualitative study employed a semi-structured interview methodology to explore sustainability leadership within the hospitality sector. All interviews were conducted via online platforms and examined using thematic analysis. The sample included 10 hotel managers from various lodging establishments in Portugal, comprising four men (40%) and six women (60%). Participants' ages ranged from below 30 to 50 years, with one manager under 30, five between 31 and 40, and four between 41 and 50. In the context of organizational sustainability, participants emphasized the importance of a long-term perspective, safety considerations, and corporate social responsibility. Half of the respondents indicated the presence of sustainability-specific policies, largely derived from group policies or specific sustainability-focused project requirements. Most participants reported that sustainability is integrated into their organization's vision and mission, with several referencing the European Union Green Deal and the United Nations Sustainable Development Goals as key frameworks guiding their strategies. The majority of participants assessed their digital proficiency as advanced, even within complex operational contexts. Organizational digitalization levels were generally advanced, although some organizations were identified at an intermediate digitalization stage. Furthermore, social dimensions of sustainability and soft skills were regarded as essential for sustainable leadership in hospitality. The most highly valued leadership soft skills included solution-oriented thinking, resilience, critical thinking, communication, and team cohesion, whereas time management was identified as a lesser priority. These findings underscore the significance of sustainability for managers in the hospitality sector, though the degree of implementation varies across lodging types and different sustainability dimensions.

Keywords: Hospitality, Tourism, Skills, Sustainable leadership, Sustainability

1. Introduction

The tourism and hospitality industry are a major contributor to global economic growth and has significant environmental and social impacts (Sakshi et al, 2019). Sustainability policies and practices are increasingly being adopted to address these impacts and ensure long-term viability. As the tourism and hospitality industry continues to grow, its impact on the environment and society becomes gradually significant. Sustainability leadership has emerged as a vital component in addressing these challenges, emphasizing the need for leaders who can effectively navigate the complexities of sustainable practices while fostering long-term organizational success. Sustainable leadership aims to interpret the concept of sustainable development from the perspective of leadership. It is a kind of leadership that aims to meet the needs of stakeholders and develop the core business of the enterprise, so as to create long-term value for all stakeholders. It emphasizes the balanced development of economy, society, and environment, and it is conducive to helping enterprises achieve profitable growth and sustainability and has become one of the hotspots of current leadership research (Liao, 2022).

The hospitality industry, central to tourism, is called to prioritize training and development in areas such as digital skills, green practices, and soft skills. This approach will not only enhance operational efficiency and guest satisfaction but also contribute to a more sustainable future. As the sector moves towards greater accountability and transparency in its operations, recognizing and nurturing these skills among its leaders will serve as the foundation for a resilient and thriving hospitality landscape, committed to sustainable development and ethical practices. Sustainability is a current concern for society as a whole and for all sectors of activity, in accordance with European Union concerns. According to UE (2022), the six thematic priority objectives to be achieved by 2030 are: (1) climate change mitigation to attain the 2030 greenhouse gas emission reduction target; (2) adaptation to climate change; (3) advancing towards a wellbeing economy that gives back to the planet more than it takes; (4) pursuing zero-pollution, including in relation to harmful chemicals; (5) protecting, preserving and restoring biodiversity, and (6) significantly reducing key environmental pressures related to the EU's material and consumption footprints including through EU 2030 reduction targets. The path to sustainable leadership in hospitality is covered with a diverse skill set, blending technical knowledge with crucial

interpersonal abilities. By equipping leaders with the tools they need, the industry can evolve to meet both present demands and future challenges, ensuring a positive contribution to society and the environment.

This paper explores the essential skills required for sustainable leadership in hospitality, highlighting the multifaceted nature of sustainability that encompasses environmental, social, and economic dimensions. Effective sustainable leaders must exhibit strong ethical commitments and a readiness to adapt to emerging technologies, while fostering collaboration among diverse stakeholders. Key competencies include not only technical and hard skills related to sustainability initiatives but also soft skills that promote teamwork, resilience, and critical thinking. The qualitative study presented, incorporating interviews with hotel managers in Portugal, which demonstrate a shared recognition of the importance of incorporating sustainability into organizational strategies. These findings underscore the necessity for leaders to possess advanced digital proficiency, allowing them to implement innovative solutions that enhance sustainability practices. Moreover, social dimensions of sustainability and the ability to communicate effectively with team members and external partners are critical for fostering an inclusive organizational culture.

The paper is organized in three main sections, the two first sections present the literature review about sustainability leadership and sustainability leadership skills and competences. After is presented the methodology used to develop the study and the main results obtained. Finally, are discussed the results, the main conclusions of the study and indicated some future research directions.

2. Sustainability Leadership in Tourism and Hospitality

All the organizations should prioritize the development of sustainability leadership capabilities at all levels and sustainability leaders need to set an example by exhibiting a dedication to ethical behaviour and long-term value generation. To Sakshi et al. (2019) strong leadership and commitment from top management are essential for successful implementation of sustainability policies, and for this propose, leaders cannot work alone. Norren and Beehner (2021) emphasize the need for both global and local action to advance sustainability leadership, and this means a greater collaboration among governments, organizations, and communities to develop and implement effective sustainability strategies. It is crucial an integrated approach to promoting sustainable tourism, which combines education, emotional engagement, and fostering a sense of place (Cheng and Wu, 2015). This also involves tourist, and this approach ensures that they are not only informed about environmental issues but also emotionally invested in protecting the destinations they visit. According to Visser and Courtice (2011) sustainability leadership is distinct from traditional leadership models, as it emphasizes long-term thinking, systemic change, and the integration of environmental, social, and economic considerations. It calls on leaders to address global issues including social inequality, resource scarcity, and climate change while balancing the demands of various stakeholders. This is also defended by Norren and Beehner (2021) that provide a comprehensive framework for understanding and advancing sustainability leadership. They argue that sustainability leadership is critical for achieving the United Nations Sustainable Development Goals (SDGs). The leaders must integrate the SDGs into organizational strategies and decision-making processes, ensuring alignment with global sustainability priorities. Visser and Courtice (2011) defend that sustainability leaders must possess a unique set of competencies, such as the ability to understand and address complex, interconnected challenges, building consensus and fostering collaboration among diverse groups. They must have emotional intelligence and visionary thinking. For Norren and Beehner (2021) leaders must (1) understand the interconnectedness of social, economic, and environmental systems, (2) prepare themselves for future challenges and opportunities, (3) apply ethical principles and values to sustainability decisions, (3) develop and implement effective sustainability strategies, (4) work with diverse stakeholders to achieve shared goals, (5) drive innovation and (6) reflect on personal values and their alignment with sustainability goals. To Visser and Courtice (2011) sustainability leadership is most effective when embedded in an organizational culture that values innovation, transparency, and accountability and leaders must champion culturally change to align organizational practices with sustainability principles. On the other hand, sustainable leadership is crucial if the business aspires to achieve their goals. Aydin and Emeksiz (2018) state that by adopting sustainable practices, the small tourism enterprises can enhance their competitiveness, profitability, and resilience while contributing to the long-term sustainability of urban tourism destinations. Hotels should invest in authentic sustainability initiatives and communicate these efforts transparently to build consumer trust and credibility, as emphasized by Chen et al. (2019). While many hotels are adopting environmentally friendly practices in response to consumer demand, some risk greenwashing by making misleading claims about their sustainability efforts. To avoid this, hotels must ensure that their actions align with their sustainability claims. Organizations should prioritize the development of sustainable leadership capabilities at all levels to implement effective sustainability strategies that integrate education and emotional engagement, enabling leaders, collaborators,

and tourists to actively contribute to protecting destinations and addressing global challenges such as social inequality and climate change, all in alignment with the United Nations Sustainable Development Goals.

3. Sustainability Leadership Skills and Competences in Tourism and Hospitality

The challenges of today's world, and the competitiveness of the global market are leading to the emergence of new skills and competences needed by workers for the labour market, including in tourism and hospitality, where soft, digital, and environmental skills are particularly important (Modi, 2024). Achieving environmental sustainability in tourism requires collaboration among governments, businesses, and consumers (Han, 2021). To Chokshi (2024) in the dynamic hospitality industry, effective leadership is pivotal for driving guest satisfaction, team engagement, and operational efficiency.

To Han (2021) consumers with higher awareness of environmental issues are more likely to engage in sustainable tourism practices and are more likely to adopt sustainable behaviours if they believe their actions will have a positive impact. To respond to consumer demands and ensure a sustainable leadership, leaders need to acquire certain skills. The first concern are the three pillars of sustainability: environmental, social, and economic. To Modi (2024) sustainable Tourism focuses on minimizing ecological effect, promoting social equity, and ensuring economic viability. Consumers are increasingly prioritizing sustainability in their travel decisions, influencing the demand for eco-friendly products and services. Han (2021) states that environmental sustainability has become a critical concern in tourism and hospitality due to increasing consumer awareness, regulatory pressures, and the industry's significant environmental footprint.

Concerning the skills and competences needed, Modi (2024) defend that we can define them as a combination of knowledge (understanding), skills (abilities), and attitudes (values and behaviours). For Modi (2024) knowledge is fundamental for understanding the sustainability principles, environmental systems, and global frameworks; the skills are critical thinking, communication, collaboration and adaptability; and attitudes, comprehend ethical responsibility, environmental valuing, cultural sensitivity and proactiveness. Competencies in knowledge, skills, and attitudes are essential for advancing sustainable tourism (Modi, 2024). A well-trained workforce equipped with these competencies can drive innovation, ethical practices, and long-term sustainability in the tourism industry, particularly in hospitality.

3.1 Digital Proficiency and Organizational Digitalization in Tourism and Hospitality Industry

To Han (2021) digital technologies such as apps, social media, and online platforms are increasingly being used to promote sustainable tourism and educate consumers. Innovations such as carbon footprint calculators, eco-certifications, and virtual reality experiences are helping consumers make more informed and sustainable choices. Information technology is now completely integrated with the travel and hospitality sector, thus having the appropriate digital skills in those organizations is crucial. Jobs are being redefined and new ones created by digitalization and new technologies, which calls for new competencies and skills (Carlisle et al., 2023). Han (2021) also defends the need for continued research, innovation, and collaboration to achieve environmental sustainability in the industry. As digitalization reshapes job roles and creates new positions, organizations must invest in developing the necessary competencies and skills. Continued research, innovation, and collaboration are vital to achieving environmental sustainability in the industry (Han, 2021; Carlisle et al., 2023). The increasing integration of digital technologies in the travel and hospitality sector is pivotal for advancing sustainable tourism and educating consumers. As job roles evolve due to digitalization, ongoing research, innovation, and collaboration are essential to fostering environmental sustainability in the industry and organizations must prioritize investment in competencies that align with these technological advancements to effectively meet sustainability goals.

3.2 Social Dimensions of Sustainability and Soft Skills in Tourism and Hospitality Industry

Soft skills play a crucial role in fostering sustainable development within contemporary society (Alikova et al., 2022). Soft skills, such as communication, teamwork, empathy, and adaptability are essential for effective collaboration and problem-solving. For Alikova et al. (2022) soft skills must be integrated in education and professional training to prepare the individuals to navigate challenges and promote sustainable practices, highlighting the importance of cultivating these skills to support not only personal growth but also collective societal progress towards sustainability goals. For Chen et al. (2019) trust is a critical factor in consumer decision-making, especially in service industries like hospitality and greenwashing indirectly affects behavioural intentions through trust. For Chen et al. (2019) consumers are sensitive to perceived dishonesty in environmental claims, so hotels must avoid greenwashing to maintain consumer trust and loyalty. Authentic and transparent communication about environmental practices is essential. According to López and Mowinckel

(2020) social skills encompass personal, interpersonal, and intercultural communication abilities, enabling individuals to engage effectively and constructively in both social and professional settings. Cultural awareness plays a crucial role in understanding and appreciating the cultural and linguistic diversity. Together, social skills and cultural awareness equip individuals to thrive in multicultural environments and contribute positively to society. The development of soft skills is essential for encouraging sustainable practices and facilitating effective collaboration in modern society. By integrating skills such as communication, teamwork, and cultural awareness into education and professional training, individuals are better prepared to overcome obstacles and promote sustainability. Overall, a focus on soft skills and cultural competence empowers individuals to contribute positively to their communities and advance sustainability goals (López and Mowinckel, 2020).

3.3 Environmental Capacity and Green skills in Tourism and Hospitality

In the tourism and hospitality sector, green skills encompass sustainable practices such as enhancing energy efficiency, minimizing waste, conserving water, and implementing eco-friendly products. These initiatives aim to reduce the environmental impact of tourism activities. For instance, hotels and restaurants are embracing green practices by utilizing renewable energy sources, managing waste effectively, and optimizing resource usage to enhance sustainability. To Osolase et al. (2023) hotels have a significant environmental footprint, making sustainability a critical focus area and green human resources practices can help hotels reduce their environmental impact while enhancing employee engagement and organizational performance. Green skills are crucial for a sustainable leadership. According to Global Green Skills Report (2022) business leaders, should foster green talent and align with global sustainability goals, like prioritize workforce development by investing in targeted training programs, learning courses, and local initiatives to equip employees with green skills. Leaders should recruit individuals who possess green skills to strengthen the organization's sustainability capabilities and recognize that green hiring and upskilling are essential to the employer brand. Leaders can play a pivotal role in advancing the green skills movement, ensuring that organizations remain competitive and contribute to a sustainable future. For Vorna et al. (2015) integrating green skills into educational and training programs to ensure that the workforce is prepared to meet the demands of environmentally sustainable practices. Adopting green initiatives can enhance organizational performance while promoting environmental responsibility that can contribute to improving productivity and innovation while reducing environmental impacts, thereby supporting long-term sustainability goals. By implementing practices that enhance energy efficiency, minimize waste, and conserve resources, hotels and restaurants can significantly reduce their environmental impact. Business leaders should prioritize workforce development by investing in targeted training and recruitment of individuals with green skills to enhance sustainability capabilities. Ultimately, adopting green initiatives not only supports long-term sustainability goals but also enhances organizational performance and innovation (Vorna et al., 2015).

4. Methodology

This qualitative and exploratory study aims to explore sustainability leadership within the hospitality sector. A semi-structured interview was used to achieve this objective. The script was organised in four sections: sociodemographic characterisation, sustainability leadership, digitalisation and digital skills, social aspects in sustainability and soft skills. The skills used in the semi-structure interview were identified after the literature review on the theme.

Our sample had 10 hotel managers from various lodging establishments in Portugal, comprising four men and six women. Participants ages ranged from below 30 to 50 years, with one manager under 30, five between 31 and 40, and four between 41 and 50. Regarding the knowledge and skills in sustainability, one of the respondents consider himself as a beginner, six consider as having basic skills, and three as being a master / expert in the subject.

Considering the human resources of the companies studied, two have less than nine employees, three have between 10 to 49 employees, three have between 50 to 249 employees, and two of them have more than 250 workers.

Some of the respondents are leaders: three of them lead to less than nine persons, one leads 13 workers, one leads 18 workers, one leads 25 persons, and the one that presents a bigger number leads about 80 persons.

Regarding the type of lodging two were five-star hotels, two four-star hotels, two three-star hotels, two apartments, and two Hostels.

Regarding the educational status and years of experience in this position, the majority has training in the area of hospitality or related areas: technical course in restaurant and bar, hotel management, Master in Marketing, Graduation and master in Psychology; Graduation in Tourism, Graduation in food engineering, Graduation and master in environmental, graduation in safety at work, Technical graduation in hospitality, Graduation in chemistry and graduation in hygiene and safety and Graduation in hospitality management.

The majority of the participants have more than 15 years of experience in the sector.

The interviews were audiotaped and verbatim transcribed for the analysis. For data analysis, thematic analysis procedures were used (Braun & Clarke, 2006).

5. Results

Questions related to sustainability leadership in hospitality

The decision-making inside the organisations is a very important issue in sustainability. All our participants had responsibilities in this field although most of them had other people with the power to make management decisions inside the organisation, specifically the hotel manager or the group manager. Most of the time the decisions are made in a democratic environment with the participation of different members of the organisation, experts, and the founder.

Regarding the sustainability of the organisation, our participants consider the most important factor the increased focus on long-time perspective, safety issues, and corporate social responsibility aspects.

Half of our participants referred to the **existence of specific policies** in hospitality related to sustainability. These policies are mainly related to specific group policies and specific demands for applying to projects in the field of sustainability. Moreover, they have also **specific policies for digitalisation** because these policies are valued when the organisations want to apply to financing projects.

Most of our participants referred to the **inclusion of sustainability in the vision and mission** of the hotels specifically related to social responsibility and the importance given to the persons and the organisation growth, to organisational culture promoting an environment of diversity and inclusion, and to environmental issues promoting the carbon-reducing, the energy and temperature control.

In the same way, the EU Green Deal and UN Sustainability Development Goals are known to almost all our participants. They have well **implemented several strategies** related to **reducing consumption, recycling**, and reusing but also **social, economic, and environmental strategies**. The most referred strategies were reducing food waste, reducing water consumption, reducing plastic and paper utilisation, towel change, light and temperature control, LED installation, non-individual amenities, having local suppliers, implementing activities to reduce poverty, reducing social inequality, promoting activities to integrate people with different needs, and helping local associations.

All the participants consider themselves **free to implement sustainability solutions in their hotels** and they consider that in the near future, there will be important improvements in their organisations in order to be more sustainable.

The **drivers for sustainability decisions** most valued by our participants were “reducing costs”, “Health and safety of employees, customers, and suppliers”, and “I belief that it is the “right thing to do” for the world”. On the opposite, the **less valued dimensions** were “Other hospitality providers are also doing it”, and “attracting investment from investors”.

Therefore, our participants consider **sustainability a top priority in hospitality**.

Although there are some **important hinderers to implement sustainable leadership** namely the quality and prices of sustainable products are not competitive, the difficulty in finding the right solution and the lack of knowledge in this field, difficulties in the selection of suppliers, creating the routines, changing the mentalities inside the organisation, and creating a culture of sustainability.

Digitalisation in hospitality

Most of our respondents considered that they **have advanced digital skills even in complex** contexts. Nevertheless, the level of digitalisation of the hotels is in majority at an advanced level but there are some at an **Intermediate level of digitalisation, just for well-defined and non-routine problems**.

Concerning the outsourcing of digital services, the ones identified are for services related to operational services for specific areas, like reservations, channel management, website, restaurant management, social media management, customer satisfaction evaluation, and finance and accountability management.

Social aspects in Sustainability and Soft skills in hospitality

According to our participants, the most valued **soft skills for hospitality leadership** were **solution-orientated, resilience, critical thinking, communication, and team spirit**.

Regarding the **implementation of social responsibility practices**, the most implemented were respectful law and ethics, public involvement, brand image, respect for human and labour rights, and family protection.

Our participants consider the importance of **promoting local communities in the hospitality industry**. With this aim, they implement activities such as having local suppliers, donations, and partnerships with local associations, creating discounts for locals, having stores with local products in their organisations, allowing academic internships and student visitations, giving the opportunity for local artists to present their job in the common spaces of the organisation, creation of initiatives that promote support to the surrounding community with constant actions adapted to the needs of the place (e.g. distribution of clothes, food, books), among several activities adapted to the specific needs of the local community.

Regarding the suppliers in hospitality industry, several participants referred that **they prefer local suppliers but**, in some cases, **it depends on the quality of the product and the price**. For the hotel groups, it is also frequent to have group suppliers that are mandatory to use. Only one participant referred to the **existence of a distance policy for purchasing** and this policy refers to buying only in the North of Portugal (the region where the lodging is located).

Generally, our participants think that **it is important to have greater proximity with the suppliers**, it will be easier to have faster and fresher deliveries, and in some cases, better prices.

6. Discussion and Conclusions

This exploratory study aimed to analyse sustainability leadership within the hospitality sector, focusing on the level of sustainability practices and leadership of the sector, including the level of digitalization and of social commitment of the organizations, as well as the role of soft skills to develop a sustainability culture. The results pointed out that organizations are moderately committed with sustainability. They all are leaders for implementing sustainability practices and initiatives in hotels, nevertheless, the decisions usually are made by hotel managers or by the hotel owners, which can be quite conditioning of decision-making. Nevertheless, it is unanimous that sustainability should be a top priority in hospitality and the existence of sustainability policies, specifically for digitalization, as well as the inclusion of sustainability in the mission and vision of hospitality businesses, since it will enhance their competitiveness and profitability. This recognition of the importance of sustainability to the hospitality industry is fully in line with several authors in the literature (Aydin and Emeksiz, 2018; Sakshi et al., 2019; Han, 2021). However, the literature didn't mention the difficulties of implementation neither the lack of capacity for sustainability leaders to decision-making in this field. Moreover, it is presented the main factors that can facilitate the adoption of sustainability leadership in the hospitality industry, which are in accordance with literature, namely, the costs and difficulty in sometimes to finding a sustainable solution (Osolase et al., 2023), the lack of knowledge is the most highlighted issue in this study and in literature (Vorna et al., 2015; Alikova et al., 2022; Modi, 2024), and also creating a culture of sustainability, by creating routines and changing the mentalities inside the organisation (Visser and Courtice, 2011; López and Mowinckel, 2020).

About businesses digitalization in the hospitality industry, it is interesting to notice that this is an aspect where all the companies of this study considered themselves well prepared and with advanced levels of digitalization, recognising the role of digitising processes and procedures for more sustainable and competitive management, as mentioned in the literature (Han, 2021; Carlisle et al., 2023). Nevertheless, it worth to notice that this mainly happens because of the funds available to companies for digitalization projects, which highlights the importance of co-operation between companies and governments to implement sustainability (Norren and Beehner, 2021).

Considering the soft skills for leadership in hospitality, from this study were valued to be solution-orientated and resilient, to have critical thinking and facilities in communication and team spirit. The soft skills are being studied has fundamental to complement the technical skills and need to be inserted in hospitality and tourism curriculums (López and Mowinckel, 2020; Alikova et al., 2022).

Finally, this study showed that hospitality businesses have a special concern with implementing social responsibility practices as developing projects that consider the ethics and respect for human and labour rights and family protection. Moreover, to involve public and local communities in sustainable activities, which will improve the brand image. In this respect, also the suppliers are first consider the locals one's, but always considering the best price guarantee and sometimes the group policy don't allow to do it because of buying policies in bigger scale, another issue that first consider the price. Literature always recommends the involvement with locals, including buying goods to local suppliers. This difficulty shown in this study can be related with the fact that although there are sustainability leaders and experts in hospitality companies, they are not the ones that make the final decision even when it comes to sustainable issues.

It is worth noting that green sustainability practices in hospitality industry, i.e. those related with reducing energy and water consumption, as well as recycling, are the practices most emphasised in this study, also in line with the literature (Osolase et al., 2023). This is also due to the co-operation and lines of funding available for this type of action.

This study has some practical implications, the hotel managers should integrate sustainability into their culture and practices. Additionally, it is crucial to invest in their digitalization through training courses and acquisition of hardware and software that will prepare hotels to face the current and future challenges. Moreover, higher education institutions in the field of hospitality should integrate issues related to sustainable leadership, digitalization and soft skills in the curriculum of future professionals.

This study was just exploratory in the field of sustainable leadership in hospitality therefore it has some limitations. Although it was considered the most relevant types of lodging in Portugal (five-star hotels, four-star hotels, three-star hotels, apartments, and Hostels), the sample was only of ten companies. Therefore, the next steps of the project will be to enlarge the sample by doing a survey to cover the main lodging companies in Portugal, of five types, to understand what the country is doing about sustainability leadership and what are the differences between the type of lodging. Moreover, it will be also considered the other collaborators of the lodging besides the sustainability leader, to understand the real feeling of the employees about the sustainability culture of the company and the challenges they face implementing it.

Another future research, continuing this project, will be to hear the customers and local communities. The customers will be to understanding how they perceive brand sustainability practices and leadership, and how this affects their choices when deciding the accommodation. Local communities are also important to study to know how they are involved in sustainable practices by the hospitality sector and how this can improve their lives.

Acknowledgements

Project funded by Erasmus+ Programme European Union - PT01-KA220-VET-000088349.

References

- Alikova, Z.R., Fidarova, K.K., Pavlova, G.S. & Kalikova, A.M., 2022. Soft skills as a component of sustainable development in modern society. *The European Proceedings of Social & Behavioural Sciences*, 129, pp.824–830. <https://doi.org/10.15405/epsbs.2022.12.107>
- Aydin, B., & Emeksiz, M.2018. Sustainable urban tourism success factors and the economic performance of small tourism enterprises. *Asia Pacific Journal of Tourism Research*, 23(10), 975–988. <https://doi.org/10.1080/10941665.2018.1513049>
- Braun, V. & Clarke, V., 2006. Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2), pp.77–101. <https://doi.org/10.1191/1478088706qp063oa>
- Carlisle, S., Ivanov, S. and Dijkmans, C. 2023, The digital skills divide: evidence from the European tourism industry, *Journal of Tourism Futures*, 9 (2), pp. 240-266. <https://doi.org/10.1108/JTF-07-2020-0114>
- Chen, H., Bernard, S. & Rahman, I., 2019. Greenwashing in hotels: A structural model of trust and behavioral intentions. *Journal of Cleaner Production*, 206, pp.326–335. <https://doi.org/10.1016/j.jclepro.2018.09.168>
- Cheng, T.M. & Wu, C., 2015. How do environmental knowledge, environmental sensitivity, and place attachment affect environmentally responsible behavior? An integrated approach for sustainable island Tourism. *Journal of Sustainable Tourism*, 23(4), pp.557–576. <https://doi.org/10.1080/09669582.2014.965177>
- Chokshi, H., 2024. Leadership Skills in Hospitality: A journey of growth. LinkedIn. Available at: <https://www.linkedin.com/pulse/leadership-skills-hospitality-journey-growth-herry-chokshi-kqdwe/>
- Global Green Skills Report, 2022. The rise of green skills: Adapting to a sustainable economy. LinkedIn Learning.

- Han, H., 2021. Consumer behavior and environmental sustainability in tourism and hospitality: a review of theories, concepts, and latest research. *Journal of Sustainable Tourism*, 29(7), pp.1–22.
<https://www.tandfonline.com/doi/full/10.1080/09669582.2021.1903019>
- Liao, Y., 2022. Sustainable leadership: A literature review and prospects for future research. *Frontiers*, pp.1–11.
<https://doi.org/10.3389/fpsyg.2022.1045570>
- López, I. S., Mowinckel, K.M, 2020. Key competences for cultural awareness and social skills in the tourist industry. *Journal of Tourism and Heritage Research*, 3, (1), pp.469-488
- Norren, D.V. & Beehner, C., 2021. Sustainability leadership, UNESCO competencies for SDGs, and diverse leadership models. *International Journal of Development and Sustainability*, 10(1), pp.24–49. Available at:
<https://isdsnet.com/ijds-v10n1-03.pdf>
- Osolase, E.H., Rasdi, R.M. & Mansor, Z.D., 2023. Developing awareness of green human resource development practices in the hotel industry. *Advances in Developing Human Resources*, 25(2), pp.116–122.
<https://doi.org/10.1177/15234223231155503>
- Modi, N., 2024. Knowledge, Skills, and Attitudes: Competencies for Sustainable Tourism. In *Springer International Handbooks of Education* (pp. 725–744). https://doi.org/10.1007/978-981-97-4318-6_48
- Parliament adopts EU environmental objectives until 2030, 2022. European Parliament. Available at:
<https://www.europarl.europa.eu/news/en/press-room/20220304IPR24804/parliament-adopts-eu-environmental-objectives-until-2030>
- Sakshi, N., Shashi, N., Cerchione, R. & Bansal, H., 2019. Measuring the impact of sustainability policy and practices in tourism and hospitality industry. *Business Strategy and the Environment*, 29(3), pp.1109–1126.
<https://doi.org/10.1002/bse.2420>
- Visser, W. & Courtice, P., 2011. Sustainability Leadership: Linking theory and practice. *SSRN Electronic Journal*.
<https://doi.org/10.2139/ssrn.1947221>
- Vona, F., Marin, G., Consoli, D. & Popp, D., 2015. Green skills. *SSRN Electronic Journal*.
<https://doi.org/10.2139/ssrn.2639099>

Social Media as a Tool to Promote Jyväskylä as A Tourism Destination

Cândida Silva¹, Ana Ferreira² and Susana Silva³

¹CITUR, ESHT, Polytechnic of Porto, Portugal

²CEGOT, CITUR, ESHT, Polytechnic of Porto, Portugal

³CEOS.PP, CITUR, ESHT, Polytechnic of Porto, Portugal

candidasilva@esht.ipp.pt

anaferreira@esht.ipp.pt

susanasilva@esht.ipp.pt

Abstract: Jyväskylä is the largest city in the Central Finland and Finnish Lakeland region. In digital era places and destinations compete against each other in an increasingly globalized market. To successfully compete, destinations need to work on developing a strong brand identity through effective positioning. The main goal of this work is to understand how social media platforms has been used to create / promote the Jyväskylä brand. An exploratory qualitative study was developed to accomplish our goals. Data were collected and analysed until October 2024. We analyse all the hashtags in the social media Instagram, Facebook, Tik ToK and YouTube defined by the municipality of Jyväskylä, namely, #jyväskylä #liikuntapääkaupunki, #capitalofsport, #tapahtumakaupunki, #opiskelijakaupunki, #visitjyväskyläregion, #visitjyväskyläregion, #valonkaupunki, #cityoflight. Based on these hashtags, the posts created by users of these platforms were analysed, namely the content of the posts they associate with the city, the author of the publication and their geographical region, and the date of publication of the posts. The data was collected using the platform Apify, and all the posts were analysed with content analysis to understand the main keywords associated with the brand Jyväskylä. Moreover, posts were analysed using the sentiment analysis tool Benty.ai, which uses artificial intelligence to analyse the tone with which the text was written. Our preliminary results show the importance of the definition of a brand for the city as a marketing strategy. When we regard the hashtags defined by municipality, they have the name of the city or associated the term “city” to the brand they want to promote, namely: sports, events, light or study. The current study provides valuable information on the current state of social media communication from stand points of branding and destination marketing. Also gives the opportunity to access and compare the effectiveness of these four platforms. Decision-makers needs to understand how to enhance the use of this technology to promote tourism destinations.

Keywords: Tourism destination, Digital brand, Facebook, Instagram, TikTok, YouTube, Jyväskylä

1. Introduction

Nowadays, social networks are part of our daily lives and are decisive communication and information tools for both personal and professional decision-making, thus playing a decisive role in publicising and promoting tourist destinations as “the tourism industry is known to be an information-intensive industry” (Sheldon, 1997; Werthner & Klein, 1999), make them decisive tools in destination promotion by allowing direct interaction between tourists/visitors and the destination.

In fact, although word-of-mouth plays an important role in the field of destination promotion, user-generated content via social networks is increasingly important in consumer choices.

Social media platforms such as Facebook, Instagram, TikTok and YouTube, as an important source for consumers to search for all kinds of information and about potential travel destinations.

By presenting an analysis of the hashtags defined by the municipality of Jyväskylä, this study provides valuable information about the current state of social media communication from the point of view of branding and marketing this destination, thus providing local decision-makers with valuable information about the potential of these digital tools in promoting Jyväskylä as a tourist destination.

The paper is organized in five main sections. The two next sections present a literature review about social media tools, its usage for tourism promotion and destinations branding. The third section is about the methodology used to carry out the study. The last section presents the conclusions and limitations of the study and addresses some future research directions.

2. Social Media and Tourism in Jyväskylä

Tourism has seen an increase in the use of social media, both by consumers (tourists) and tourism agents, in an exchange of content generated by both. This content is even more important today because social networks offer low-cost communication and wide demographic penetration compared to traditional media (Kaplan &

Haenlein, 2010), which attracts local territory managers to use them as a tool for promoting destinations (Hays et al., 2013).

At the same time, travellers also use social media before, during and after their trips (Leung & Jiang, 2018), contributing to the dissemination and promotion of destinations. As many authors have pointed out, by making it possible to visualise destinations (Gretzel & Yoo, 2008) in the pre-travel phase (Amaro et al., 2016), social networks allow travellers to avoid risks (Narangajavana et al., 2017) and make purchasing decisions (Zhang & Chen, 2017).

Regarding the relationship between tourist agents (public and private) and visitors/tourists, the fact that they have a presence in the digital world allows them to achieve global visibility and enables the establishment of relationships with customers in real time, satisfying specific needs and overcoming language barriers or from different cultures.

2.1 Facebook

The last statistics pointed that social networking website Facebook in the first days of 2025 had 3.07 billion monthly active users (MAU) and 2.11 billion daily active users (DAU). This figure accounts for 59.38% of all social media users worldwide and remain the most popular social media platform (Meltwater, 2025).

The platform enables its users to create an online profile and invite friends who can post, write comments on walls, and watch each other's activities (Ellison et al., 2007; Kumar, 2018).

Still based on the 2024 Facebook statistics, Facebook pages typically share around 1.75 posts each day. Photo posts dominate, accounting for 34.3% of all page posts followed by Video posts, representing 19.3% of the total. Link posts are also quite popular, representing 42.9% of all posts (Meltwater, 2024).

In fact, 63.2% of users indicated that they utilize Facebook to share photos and videos. Additionally, more than half of the users mentioned that they prefer using Facebook to follow and research the brands and products they like, which allows us to affirm that Facebook should be part of any brand's social media marketing strategy.

This is especially important since recent data also shows that ad clicking is one of the top uses of Facebook. The average Facebook user clicks on 12 Facebook ads every month.

In this sense, it is also a tool for destination promotion, and it has become the first choice to create a destination's brand and interact with customers/visitors, influencing their travel decisions.

Facebook enable tourism marketers to develop innovative ways to promote a destination image and increase travel in an increasingly complex and competitive global marketplace.

2.2 YouTube

YouTube started as a social media tool but is now evolving into a marketing communication tool. Recent tourism studies have attempted to investigate the impact of YouTube videos on the tourism industry (Motahar et al, 2024) in producing and representing tourist destinations, to reach new customers. The persuasiveness of visual messages on YouTube and their influence on potential travellers is increasingly important. By shaping the image of a destination, these audiovisual documents create positive perceptions in the tourist's imagination.

According to the Digital 2024 Global Overview Report (Meltwater, 2024) YouTube's potential ad reach totalled 2.49 billion users with over 122 million people accessing YouTube daily to watch over a billion hours of video and generate billions of views.

According to the same source, YouTube is the most used social platform for research purposes among B2B decision-makers with 50.9% of users (Meltwater, 2024).

In fact, today YouTube is the second most popular social media platform, after Facebook.

2.3 Instagram

Instagram, a photo-sharing social networking service, enables users to take pictures edit them and to post and share their images online and directly with their followers on the social network.

With 2 billion monthly active users (MAU) as of 2025 and over 500 million daily active users (DAU), according to Statista, the global data and business intelligence platform, Instagram is the third most popular social media platform worldwide (Meltwater, 2025).

This data materialized, as per Data Portal's Global Overview Report (Meltwater, 2024), in the fact that Instagram users spend an average of 31 minutes and 40 seconds daily on the platform which translates to 15 hours and 50 minutes every month.

Additionally, if we consider that these 2 billion active users, represents about 37% of the world's internet users, we cannot remain indifferent to the decisive role that Instagram has in decision-making (Meltwater, 2024).

2.4 TikTok

The development of information technology and the 4G network, and more recently 5G, has allowed the change in the way people communicate and interact, moving from text and images to short videos, powered by social networks. Launched in 2016, Tik Tok exploded onto the social media scene by giving users the ability to create short videos that can be up to three minutes long, making it a hub for entertainment content. This sharing of funny moments not only has the advantages of large user base marketing and wide range of outreach that traditional social media platforms have, but as Xiaoyu (2018) points out, it can also use short videos as a carrier to present tourism products to potential tourists in a creative novel and topical way,

In fact, ranked as the most downloaded app of 2021, TikTok beat out long-time social media favourites Instagram, Facebook in terms of downloads. In addition, TikTok statistics show the app reached in 2021 one billion active users, allowing it to provide entertainment to its community all around the globe.

Statista data shows Statista predicted that TikTok is expected to reach 1.8 billion monthly active users (MAU) by the end of 2024 and more than 30 million daily active users (DAU), via IOS.

In fact, with 272 videos posted every second, 16,000 videos posted every minute, 981 thousand videos posted every hour, 34 million videos posted each day and 707 million videos posted each month, TikTok is the fifth most popular Social Media Platform Worldwide behind Facebook, YouTube, Instagram and WhatsApp (Meltwater, 2024).

Data shows the average user opens the TikTok App 20 times per day (Meltwater, 2024). These numbers quickly attracted the attention of tourism destination marketing organizations, making TikTok a great tourism marketing tool.

3. Social Media and Destinations Branding

The data previously presented prove that more and more people are actively engaging in social media, which has empowered them in such a way that social media become strategic marketing platforms.

As literature review shows, to successfully compete against each other, destinations need to develop a strong brand identity that allows them to distinguish themselves from others and thus expand their audience. In this process social media become crucial digital marketing tools to touristic destinations promoting the territory and its characteristics.

In fact, Social media platforms help customers (users) generate and share content (Huerta-Álvarez et al., 2020), ultimately making that content a reliable form of communication which leads us to the importance of a clear identification of the destination's brand image in a way that the image perceived by consumers corresponds to the one we intend to associate with the territory and its specificities.

Since 2012 platforms have chosen to intervene through hashtag moderation. Or hashtags (#) direct social media algorithms to show a post in the feeds of interested audience, becoming, as Schmidt (2014), states "the most visible form of communication on social networks, connecting content between users "who have no pre-existing follower/follower relationship" what make them convenient tools for limit relevant content between users. When we analyse Social Media Marketing (SMM) effectiveness we need to focus on two crucial aspects: content quality and involvement. Blanchard (2011) suggests that Content quality is an important aspect but not quantity because millions of followers/fans could act as "ghost followers", which means these followers/fans have never been actively involved in the online conversation. At the same time Dumenco (2011) advises that the number of brand mentions are not the real indicator of the SMM effectiveness, especially when the word is so generic, which can be misinterpreted by the social media monitoring tool (Dumenco, 2011).

Thus, the visibility of hashtags is directly related with topics. As Chakrabarti et al. (2023) highlight "users search for posts of their interest using hashtags and as a result, posts annotated with those hashtags are rendered by the social Therefore, if a post does not contain the relevant hashtags, then it may not appear as a search result

leading to a loss of potential audience and lesser social popularity” and the opposite is also true , the use of appropriate hashtags can increase the accessibility of a publication, making it visible to a wider audience.

These facts allow us to state that the use of appropriate hashtags leads to greater user engagement and, consequently, greater the popularity of destinations.

So, as Burgess and Bruns (2015) state “There is a strong need to put hashtag uses into better perspective by comparing the patterns of engagement around topical hashtags.” It will be necessary to question their relationship with the destination to promote visitor engagement with more effective posts and inviting them to build contents in their social media accounts and work together in the destination brand.

4. Research Methodology

This exploratory study uses a qualitative methodology to answer the research question How are social media (Instagram, TikTok, Facebook, and YouTube) platforms used to promote a tourism destination? With this question, our main objective is to understand how social media platforms have been used to create/promote the Jyväskylä brand.

To develop this study, we analyze all the publications on Instagram, TikTok, Facebook, and YouTube between 2013 and October 2024. We consider this timeline because it was the beginning of the profiles and, in 2024, the moment data were collected from the platforms for analysis.

For the data collection, we consider all the hashtags defined by the municipality of Jyväskylä: #jyväskylä, #liikuntapääkaupunki, #capitalofsport, #tapahtumakaupunki, #opiskelijakaupunki, #visitjyväskyläregion, #visitjyvaskylaregion, #valonkaupunki, #cityoflight.

The data was collected using the platform Apify. All the content was transferred to an Excel file. We analyzed information related to the date of publication, author’s profile (individual or organizational), geographic localization, and content of the publication. It is important to notice that in TikTok wasn’t analysed the type of user neither their geographic location because this data is not available in the public profile.

For the content of publication, the text was analyzed according to context analysis procedures (Bardin, 2011) considering the following categories: Student life, Events and Festivals, Tourism and Travel, Art and Culture, Sports and Recreation, Nature, Shopping, and Gastronomy.

Additionally, the platform Benty.ai was used to analyze posts’ content. This platform uses artificial intelligence to analyze text according to the tone used, creating a sentiment category: Positive, Neutral or Negative. Moreover, it gives some recommendations about what thematic is more relevant in the posts. Only posts written in English was consider in this analysis.

To understand the possible variation in the use of these platforms, the annual and total growth rate per platform was calculated.

Our sample is composed of 1142 results. We collected 344 publications from Instagram, 279 publications from Facebook, 370 from TikTok, and 149 from YouTube. Table 1 summarises the number of publications per platform and hashtag. Notice that the hashtags #capitalofsport and #cityoflight are too generic and for that reason the posts retrieved without any hashtag related with Jyväskylä were not considered.

Table 1: Number of publications used on Instagram, Facebook, TikTok, and YouTube according to the hashtags used

Hashtag	Instagram	Facebook	TikTok	YouTube
#jyväskylä	189	47	165	24
#jyvaskyla	25	0	16	0
#liikuntapääkaupunki	61	50	7	2
#capitalofsport	6	0	0	0
#tapahtumakaupunki	50	18	6	0
#opiskelijakaupunki	50	13	9	0
#visitjyväskyläregion	52	50	8	0
#visitjyvaskylaregion	66	49	109	27

Hashtag	Instagram	Facebook	TikTok	YouTube
#valonkaupunki	52	51	52	7
#cityoflight	8	1	35	0

5. Results

The results show that in all the social media networks the most active profiles are organizational entities, being an exception of YouTube, where there are more individuals making videos than organizations, as presented in Table 2.

Table 2: Number of posts per Type of Entity.

Type of Entity	Instagram	Facebook	YouTube
Organizational	286	250	61
Individual	58	29	88

Considering the expressive number of organizational posts, it was analysed the type of business or organizations that make these posts. All of them are from the services sector, being the municipalities the most active promoting the activities, events, facilities and the overall region, nevertheless, noticing some prevalence in other services like organizations related with arts and sports, hospitality and restaurants, digital content creators and photographers. In these results the Instagram is the most used network. Table 3 presents the business and organizations with more than 10 posts in some of the network analysed.

Table 3: Number of posts per Type of Organization

Organization	Instagram	Facebook	YouTube
Municipality	42	37	26
Sport Team	43	38	15
Art Centre/Gallery	25	13	-
Museum	16	2	-
Hospitality	10	16	-
Restaurant	5	14	-
Digital Content Creator	14	22	-
Photographer	17	-	-
Students Association	28	7	-
Store	14	13	3

About the geographic location of the users, mainly they are from Finland in all the platforms, justified by being mostly organizations promoting the region, while promotes their services, as shown in Table 4. Moreover, there are an increasing interest in using videos in YouTube, mainly by individuals, and from countries like Russia and India.

Table 4: Number of posts per Country

Country	Instagram	Facebook	YouTube
Finland	341	275	123
USA	1	2	-
Germany	-	1	1
Denmark	1	-	-
Norway	-	-	1
Russia	-	-	9
India	-	-	13
Italy	-	-	1
Luxembourg	-	-	1

About the TikTok social media network, as already mentioned, this platform doesn't have public information the profile of the users, and it is a platform of very short videos with a growing interest especially among young. The results show that the usage of hashtags is indiscriminate and exaggerated, since on average each post has around 30 hashtags, and there are posts with 42 hashtags. Analysing these hashtags, most of them are not concerning the region or their activities, but single words or banter. Nevertheless, there hashtags related with the region and its activities, namely tourism, nature, sports, being a city of light and for students: #keskisuomi is used 57 times, #keskisuomenmuseo is used 17, #kotimaanmatkailu is used 47, #aalto2 is used 18 times, #finland is used 20, #helsinki is used 6, #cityoflight is used 35, #cityoflight2024 is used 19, #autumn is used 11, #syksy is used 13, #christmascountdown is used 10, #avaruudenpääkaupunki is used 10, #lightart is used 22, #lightfestival is used 20, #liikunta is used 13, #matkailu is used 47, #matkailuvinkit is used 32, #nature is used 10, #opiskelija is used 10, #opiskelijaelämää is used 25, #opiskelu is used 16, #sauna is used 11, #travelinspo is used 31, #traveltiktok is used 30, #traveltok is used 39, #valonkaupunki is used 52, #valonkaupunki2023 is used 14, #valonkaupunki20232024 is used 26, #valotapahtuma is used 20, #suomi is used 15, #suomitiktok is used 37, #tiktoksuomi is used 59, #ttsuomi is used 14, #visitfinland is used 26, #visitjyvaskyla is used 10, #visitjyvaskylä is used 44, and #visitjyvaskylaregion is used 109.

There are others with some usage but without any significance to the region, like #foryou is used 38 times, #foryoupage is used 13, #sinulle is used 18, #sinullesivu is used 12, and #fyp is used 102 times.

Moreover, it was analysed the activity in TikTok by Author Name, noticing that most of the hashtags related with the region and its activities should come from the municipality services, since the most active accounts are: *aalto2museum* with 12 posts, *jyvaskylankaupunki* with 12 posts, *valonkaupunki* with 24 posts, and *visitjyvaskylaregion* with 70 posts.

The results show that when comparing the usage of all the platforms, it is evident that Instagram is the preferred, with a total 344 posts, but also that from the 279 posts on Facebook, 124 are from Instagram users.

Figure 1 show that all the platforms had a significant growth in 2024, especially the Instagram, and that most users continues to maintain activity on Facebook, even though the connection is facilitated by the platforms. It worth to notice the growing of TikTok usage since 2021, showing that this is a social media network that promise to become a promising way to promoting tourist destinations.

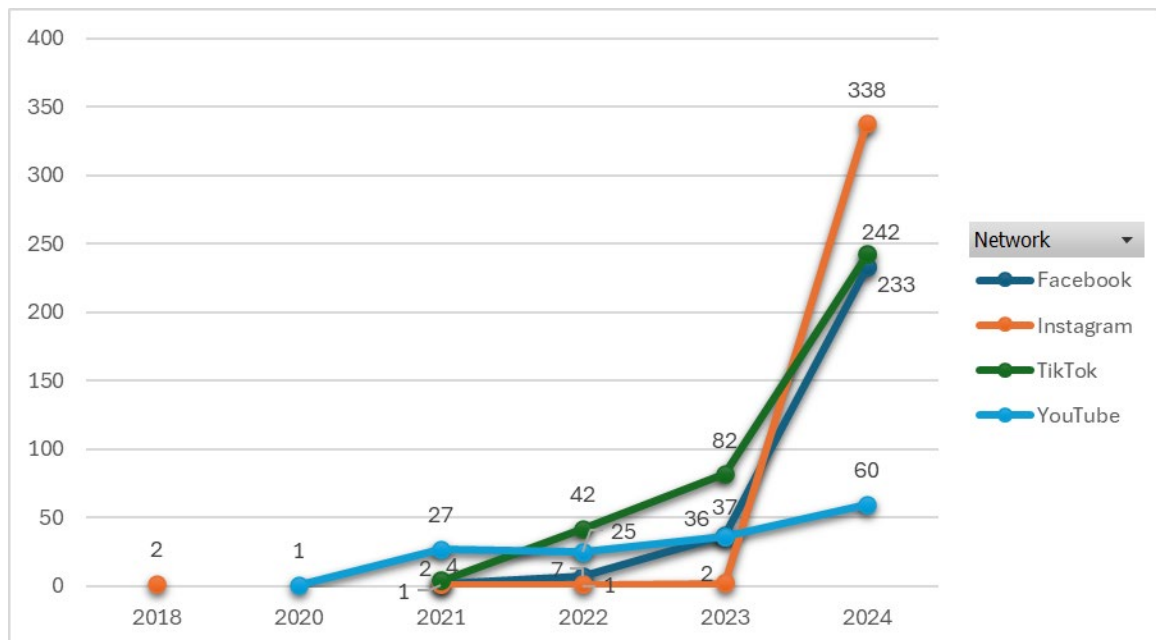


Figure 1: Evolution of the platform usage since 2018

Considering the analyses of the text written in the posts, it only was analysed the text written in English, being 94 on Instagram, 70 on YouTube, 31 on Facebook and 101 on TikTok. From that analysis had emerged 8 categories: Student life, Events and Festivals, Tourism and Travel, Art and Culture, Sports and Recreation, Nature, Shopping and Gastronomy.

Student life, the education is highly valued in the city, with a very well-known university. Jyväskylä is a popular city for students due to its convenient size and short distances, where they can easily get around the city on foot, by bike or by bus.

Events and Festivals, Jyväskylä hosts several events through the year and has a vibrant cultural scene.

Tourism and Travel, the city has a rich cultural scene, with many museums, galleries and performance venues. The tourism industry is growing with many visitors attracted to its natural beauty and outdoor activities. The city has a lot of offers in terms of culture and events.

Art and Culture, Jyväskylä has several art centres and galleries, as well as museums, being known for its rich cultural scene.

Sports and Recreation, Jyväskylä sport events and art performance are well-attended and popular among locals and tourists. Moreover, the sport events are highly competitive and attract top-level athletes. This city has a strong sports culture.

Nature, the city is surrounded by a beautiful natural scenery, and it has a strong focus in outdoor activities. The city has many parks and nature reserves.

Shopping, Jyväskylä is a popular city destination in Finland and has a variety of shopping options.

Gastronomy, the city known for its traditional cuisine and has a variety of food options.

Additionally, it was used the platform Benty.ai to make a sentiment analysis to the text written in the posts. This platform uses artificial intelligence algorithms to analyse the sentiment that users have when they write the posts, classified in terms of type of feedback, Positive, Neutral or Negative, presenting some recommendations. In Instagram platform the result was 100% positive feedback, recommending the events, festivals and sport activities in Jyväskylä, the city natural landscapes and cultural attractions, and studying in Jyväskylä. The YouTube platform presented 92,8% positive feedback, 3,6% neutral feedback and 3,6% negative feedback. The suggestions are related with improving the tourism infrastructures and the variety of shopping options. Furthermore, to develop more outdoor activities and nature-based tourism, and improve the city' food area by adding more restaurants and cafes. About the Facebook platform, the result was 96,7% positive feedback and 3,3% neutral feedback, recommending improving the public transportation to make the city more convenient for students and tourist, as well as to enhance the overall experience in the city by providing more amenities and services to students, students, and locals alike. Moreover, to increase the number of events and festivals to attract more visitors, develop more art and cultural programs to showcase its rich heritage, and finally to invest in outdoor infrastructure to make the city more appealing to outdoor enthusiasts. The TikTok platform presented 95,5% positive feedback and 4,5% neutral feedback, just highlighting that the city has a strong sense of community, with many events and activities that bring people together, like sport teams and clubs, museums, festivals and concerts, making the city a rich cultural scene.

6. Conclusions

The main conclusion of this study is that although hashtags (#), as Schmidt (2014), states are "the most visible form of communication on social networks, connecting content between users", most of the hashtags used about Jyväskylä as tourism destination are not concerning the region or their activities, but single words or banter.

It is important to highlight that all the social networks listed will have a very high post growth rate in 2024 and, despite Facebook is the most used platform overall, when we look at the use of social networks that promote Jyväskylä, Instagram is the favourite.

Furthermore, in TikTok, most of the hashtags related with the region and its activities are from the municipality services and the posts on the different platforms are also mostly from public entities, and in particular from the municipality.

This study contributes to an analysis of the impact of the main social media on the interaction between users (mostly of Finnish origin) and the Jyväskylä destination, allowing tourism agents to make decisions about future action in order to enhance them and consolidate the brand, in particular in defining the hashtags that most motivate users in this interaction.

It is now irrefutable that social media are decisive tools in the promotion of the territory.

Future research should analyse in particular the interaction of individual users and measure the return of this interaction on destination's brand and their influence on travel decisions. Moreover, it will be done a research study into what information or contents a post or a video should include, would help marketing planners take advantage of this new technology to connect new users and influence their travel decision. The use of hashtags is widespread and accepted by everyone, but how to define them and who defines them?

Acknowledgements

The authors acknowledge the financial support from the Centre of Studies in Geography and Spatial Planning (CEGOT), funded by national funds through the Foundation for Science and Technology (FCT) under the reference UIDB/04084/2025.

Ethics Declaration: Ethical clearance was not required for this research.

AI Declaration: AI tools were not used for the creation of this paper.

References

- Amaro, S., Duarte, P., & Henriques, C. (2016). Travelers' use of social media: A clustering approach. *Annals of Tourism Research*, 59, 1 – 15. <https://doi.org/10.1016/j.annals.2016.03.007>
- Blanchard, O. (2011). Social media ROI. Indianapolis, IN: QUE.
- Bruns, A., & Burgess, J. (2015). Twitter hashtags from ad hoc to calculated publics. *Hashtag publics: The power and politics of discursive networks*, 13-28.
- Chakrabarti, P., Malvi, E., Bansal, S., & Kumar, N. (2023). Hashtag recommendation for enhancing the popularity of social media posts. *Social Network Analysis and Mining*, 13(1), 21
- Dumenco, S. (2011). Metrics mess: Five sad truths about measurement right now. *Advertising Age*, 82(9), 8-9. Retrieved from <http://web.ebscohost.com/ehost/detail?sid=141fa2b0-4407-46bd-9040-bad80748680e%40sessionmgr14&vid=4&hid=15&bdata=JnNpdGU9ZWwhvc3QtbGl2ZQ%3d%3d#db=a9h&AN=58704668>
- Ellison, N. B., Steinfield, C., & Lampe, C. (2007). The benefits of Facebook "friends": Social capital and college students' use of online social network sites. *Journal of Computer-Mediated Communication*, 12(4), 1143 – 1168. <https://doi.org/10.1111/j.1083-6101.2007.00367.x>
- Gretzel, U., & Yoo, K. H. (2008). Use and impact of online travel reviews. *Information and Communication Technologies in Tourism*, 2008, 35 – 46. https://doi.org/10.1007/978-3-211-77280-5_4
- Hays, S., Page, S. J., & Buhalis, D. (2013). Social media as a destination marketing tool: Its use by national tourism organisations. *Current Issues in Tourism*, 16(3), 211 – 239. <https://doi.org/10.1080/13683500.2012.662215>
- Huerta-Álvarez, R., Cambra-Fierro, J. J., & Fuentes-Blasco, M. (2020). The interplay between social media communication, brand equity and brand engagement in tourist destinations: An analysis in an emerging economy. *Journal of Destination Marketing & Management*, 16, 100413.
- Kaplan, A. M., & Haenlein, M. (2010). Users of the world, unite! The challenges and opportunities of social media. *Business Horizons*, 53(1), 59 – 68. <https://doi.org/10.1016/j.bushor.2009.09.003>
- Kumar, P. (2018). Study on factors influencing tourists' perceived benefits of Facebook contents of the State tourism departments (Doctoral thesis, Pondicherry University, Puducherry, India). <http://dspace.pondiuni.edu.in/jspui/bitstream/123456789/2983/1/T6798.pdf>
- Kumar, P.; Mishra, J. M. & Rao, Y.V (2022). Analysing tourism destination promotion through Facebook by Destination Marketing Organizations of India, *Current Issues in Tourism*, 25:9, 1416-1431
- Kumar, N. (2025) - Facebook Users Statistics (2025) — Worldwide Data, available at <https://www.demandsage.com/facebook-statistics/>
- Leung, X. Y., & Jiang, L. (2018). How do destination Facebook pages work? An extended TPB model of fans' visit intention. *Journal of Hospitality and Tourism Technology*, 9(3), 397 – 416. <https://doi.org/10.1108/JHTT-09-2017-0088>
- Meltwater (2024). Digital 2024 Global Overview Report. <https://www.meltwater.com/en/2024-global-digital-trends>
- Meltwater (2025). Digital 2025 Global Overview Report. <https://www.meltwater.com/en/global-digital-trends>
- Motahar, P. S., Tavakoli, R., & Mura, P. (2024). Social media influencers' visual framing of Iran on YouTube. *Tourism Recreation Research*, 49(2), 270-282.
- Narangajavana, Y., Fiol, L. J. C., Tena, M. Á. M., Artola, R. M. R., & García, J. S. (2017). The influence of social media in creating expectations. An empirical study for a tourist destination. *Annals of Tourism Research*, 65, 60 – 70. <https://doi.org/10.1016/j.annals.2017.05.002>
- Schmidt, J. H. (2014). Twitter and the rise of personal publics. *Twitter and society*, 3-14.
- Sheldon, P. J. (1997). *Tourism information technology*. CAB International.
- Statista (2025). Social media - statistics & facts available at <https://www.statista.com/>
- Werthner, H., & Klein, S. (1999). *Information technology and tourism: A challenging relationship*. Springer.
- Zhang, H., & Chen, Y. (2017). The influence of brand engagement on brand relationship quality and repurchase intention. *Tourism Tribune*, 32(4), 43 – 53. Retrieved September 20, 2019, from <http://www.lyxk.com.cn/EN/Y2017/V32/I4/43#>

Kumar, P. (2018). Study on factors influencing tourists' perceived benefits of Facebook contents of the State tourism departments (Doctoral thesis, Pondicherry University, Puducherry, India).
<http://dspace.pondiuni.edu.in/jspui/bitstream/123456789/2983/1/T6798.pdf>

Co-Creation in Wellness Tourism: Insights from Thailand

Varintra Sirisuthikul and Pichai Pusumpun

Srinakharinwirot University, Bangkok, Thailand

varintra@g.swu.ac.th

pichaipu@g.swu.ac.th

Abstract: With the rapid growth of wellness tourism and rising consumer demand for personalized and interactive experiences, achieving sustainable success in the industry requires a deep understanding of the emotional and psychological aspects of customer experiences. As modern travelers increasingly seek active involvement in shaping their health and wellness journeys, co-creation has become a vital component of service delivery. This study examines the role of co-creation in shaping customer experiences within Thailand's wellness tourism sector. Using a qualitative approach, 30 in-depth, semi-structured interviews were conducted with representatives from leading spa hotels to explore the interactive processes that drive customer participation in co-creating wellness services. Through thematic analysis, the study identifies patterns and relationships within customer-provider interactions across three interconnected stages—before, during, and after service delivery. The findings reveal that the intensity and nature of these interactions evolve throughout the wellness journey, leading to distinct forms of co-creation and varying customer outcomes. Understanding these dynamic interactions provides industry stakeholders with valuable insights into innovative business practices that enhance customer satisfaction and strengthen a destination's competitive advantage. By bridging theory and practice, this study contributes to wellness tourism literature and offers sustainable business strategies for integrating co-creation into service models, ultimately fostering customer loyalty and long-term business sustainability.

Keywords: Wellness tourism, Value co-creation, Customer engagement, Customer-provider interaction

1. Introduction

Wellness tourism has experienced significant growth over the past decades (Choi et al 2015; Dillette, Douglas & Andrzejewski 2021). The Global Wellness Institute (GWI) projects that the global wellness economy will expand at an annual rate of 7.3% from 2023 to 2028, with the sector rebounding from the pandemic and expected to reach approximately \$9.0 trillion by 2028 (GWI 2023; Jackson, Sam & Dawson 2024). Wellness tourism, which focuses on travel aimed at improving health and well-being, increasingly emphasizes the emotional and psychological dimensions of customer experiences. Personalized services are especially vital in fostering customer satisfaction and brand loyalty (Vargo & Lusch 2008). The customer engagement and value co-creation is increasingly recognized as a critical factor in enhancing tourism experiences (Nangpiire, Silva & Alves 2022), with personalized interactions playing a pivotal role in driving customer satisfaction and long-term loyalty (Kim, Chiang & Tang 2017; Vargo & Lusch, 2008). However, research on customer engagement and its contribution to experience creation within service and hospitality contexts remains limited (Kim, Chiang & Tang 2017; He, Liu & Li 2021; Meeprom & Chancharat 2022).

Thailand has emerged as a key player in the global wellness economy, with its wellness sector valued at US\$40.5 billion in 2023, compared to US\$12 billion in 2017, (GWI 2018). However, despite its growing popularity, wellness tourism remains an ambiguous and somewhat inconsistent concept due to diverse literature and varying terminology used across different countries to describe businesses within the sector (Dini & Pencarelli 2021). This study examines the interactive processes of co-creation, focusing on how customer engagement contributes to service customization and competitive differentiation within Thailand's wellness tourism sector from the perspective of wellness tourism providers. To address these objectives, the study explores the following research questions:

- How do customers contribute to value co-creation in wellness tourism?
- What are the primary forms of customer-provider collaboration that shape service experiences?
- What strategies can wellness tourism businesses implement to strengthen co-creation processes?

This study is particularly significant given the rapid expansion of wellness tourism and shifting consumer expectations toward more personalized and interactive service experiences (Choi et al 2020). Furthermore, previous studies highlight the strategic benefits of co-creation, including enhanced customer loyalty, brand differentiation, and service innovation (Yi & Gong 2013; McManus & Ardley 2019). However, research on co-creation specific to wellness tourism remains limited (Pongwat, Sun & Law 2024), underscoring the need for this study. By providing empirical insights into how businesses can integrate co-creation into their service models, this research offers strategic guidance for sustainable tourism development. By bridging theory and practice, the study contributes to wellness tourism literature and proposes sustainable business strategies that enhance

customer engagement, foster brand loyalty, and support long-term business success. The article is structured as follows: the first part provides a literature review on wellness tourism, customer engagement and value co-creation, followed by the qualitative research methodology, key findings, discussion and conclusion.

2. Literature Review

2.1 Wellness Tourism

The United Nations World Tourism Organization refers to wellness tourism as travel aimed at improving and balancing all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual. The Global Wellness Institute defines wellness as the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health (GWI 2018). However, wellness is often confused with related concepts such as health, well-being, and happiness, leading to ambiguity in its definition (Chaulagain, Pizam & Wang 2021; Xie, Guan & He 2022). Wellness is a multidimensional concept, encompassing environmental, social, spiritual, physical, mental, and emotional dimensions (Dini & Pencarelli 2021; GWI 2023). GWI (2023) categorizes the wellness economy into eleven sectors: (1) Personal Care & Beauty, (2) Healthy Eating, Nutrition, & Weight Loss, (3) Physical Activity, (4) Wellness Tourism, (5) Public Health, Prevention, & Personalized Medicine, (6) Traditional & Complementary Medicine, (7) Wellness Real Estate, (8) Mental Wellness, (9) Spas, (10) Workplace Wellness, and (11) Thermal/Mineral Springs.

Thailand is a key player in the global health and wellness industry, with its wellness sector valued at \$40.5 billion in 2023, compared to \$12 billion in 2017 (GWI 2018; GWI 2024). The country has long been recognized for its wellness tourism offerings, particularly traditional Thai massage, which is deeply rooted in Buddhist traditions and influenced by Indian, Chinese, and Southeast Asian healing practices. Over time, Thailand's spa and wellness industry has expanded to include diverse services such as herbal treatments, hot stone therapies, and aromatherapy, blending traditional healing methods with modern wellness concepts. Thailand's leadership in the wellness tourism market is reflected in its revenue and visitor numbers. In 2024, the country's top three wellness sectors were wellness tourism (US\$12.34 billion), healthy eating, nutrition, and weight loss (US\$9.18 billion), and personal care and beauty (US\$7.19 billion) (GWI 2024). With its strong cultural heritage, government support, and increasing global demand for holistic well-being experiences, Thailand continues to be a leading destination for wellness tourism.

2.2 Customer Engagement

Customer engagement refers to the depth of customers' participation and their emotional and behavioral connection to a brand, product, or service. It extends beyond the act of purchase, encompassing two-way interactions that strengthen customer-enterprise relationships (Xie, Guan & He 2022). Active engagement is fundamental to successful value co-creation, as it fosters collaboration between customers and service providers (Vargo & Lusch 2016). Customer engagement plays a vital role in making co-creation an integral part of the tourism experience (Nangpiire, Silva & Alves 2022; Vargo & Lusch 2008). Romero (2017) views value co-creation as a behavioral manifestation of customer engagement, enabling customers to actively participate in interactive, value co-creative experiences within the travel context. Customer engagement is a critical focus in the hospitality and tourism industry, as businesses implement strategies to enhance customer connections at different stages of the consumption journey (So & Li 2020). Seyfi et al (2024) examine how different dimensions of tourist engagement influence heritage tourists' intentions to revisit and share word-of-mouth (WOM). They emphasize that tourist engagement plays a crucial role in building sustainable relationships with destinations, enhancing long-term business performance, and contributing to the development of the tourism sector.

2.3 Value Co-Creation in Service Industries

Co-creation and value co-creation are closely related but distinct concepts. Both play a fundamental role in modern business and innovation strategies, yet their scope and focus differ. Co-creation broadly refers to collaborative processes in which multiple stakeholders—such as customers, businesses, or communities—work together to create new ideas, products, or services. In contrast, value co-creation builds on the idea that value exchange is not only defined in terms of the supplier, but is also generated by interaction among providers, users and other co-creators (Payne et al 2008; Bettencourt 1997). Customer value co-creation is defined as “benefit realized from integration of resources through activities and interactions with collaborators in the customer's service network” (McColl-Kennedy et al 2012). Yi and Gong (2013) identify two primary dimensions of customer value co-creation behavior: 1) Customer Participation Behavior – Includes activities such as information seeking, information sharing, responsible behavior, and personal interaction; and 2) Customer Citizenship Behavior – Involves behaviors such as providing feedback, advocating for services, assisting other customers, and

demonstrating tolerance. These behaviors significantly shape service experiences and influence customer satisfaction in wellness tourism. Gallan et al (2013) highlight the importance of customer participation in improving health service outcomes. McColl-Kennedy et al (2012) point out the diverse nature of value co-creation activities in health services and further categorize them into eight key activities: 1) cooperating, 2) collating information, 3) combining complementary therapies, 4) co-learning, 5) adapting behaviors, 6) connecting with others, 7) co-production, and 8) cognitive engagement.

3. Methodology

This study uses a qualitative approach to understand how customers and service providers work together to create value in wellness tourism experiences. Qualitative research is useful for exploring complex topics in health and well-being, as it provides deeper insights into real-life experiences that numbers alone cannot fully explain (Braun & Clarke 2014). The qualitative approach is essential for this study, as it focuses on real-world interactions and uncovers important details that other research methods might overlook (Marshall & Rossman 2014). This study involved 30 in-depth interviews with wellness tourism providers across six major wellness tourism hubs in Thailand—Bangkok, Pattaya, Hua Hin, Chiang Mai, Phuket and Samui. Participants included spa managers and service providers from 15 well-known spas, divided into four types: 2 destination spas, 2 medical spas, 7 hotel spas, and 4 day spas (as shown in Table 1).

Table 1: Participant list

Destination	Type of Provider	No. of Interviewees (n=30)
Bangkok	Medical Spa 1	2
	Medical Spa 2	1
	Day Spa 1	2
Pattaya	Hotel Spa	2
	Day Spa	3
Hua Hin	Hotel Spa	3
	Destination Spa	2
Chiang Mai	Hotel Spa	3
	Destination Spa	2
Phuket	Hotel Spa 1	2
	Hotel Spa 2	1
	Day Spa	2
Samui	Hotel Spa 1	2
	Hotel Spa 2	2
	Day Spa	1

4. Findings

Based on the thematic analysis of the interview results, this study identified eight activities of value co-creation for wellness spa, adapted from McColl-Kennedy (2012) as discussed below:

Activity 1. Co-operating

Definition of Practice: Cooperating involves mutual efforts between customers and service providers to achieve shared goals, such as tailoring treatments to meet specific health needs.

Theme Connection: Co-cooperating captures this customer-provider partnership, emphasizing a collaborative spirit where both parties work actively and equally toward the desired outcomes.

Finding: In wellness tourism, customers and providers often cooperate during treatments or planning services. For example, a customer's willingness to provide health history allows providers to optimize therapeutic solutions, underscoring the cooperative nature of value co-creation.

Activity 2. Co-sharing

Definition of Practice: Collating information involves gathering and exchanging relevant data, such as preferences or feedback, to enhance service delivery.

Theme Connection: Co-sharing reflects the mutual exchange of information between customers and service providers.

Finding: In the wellness context, customers share their health concerns or desired outcomes, while providers reciprocate with details on treatment options. This bilateral sharing ensures alignment and contributes to service customization and value enhancement.

Activity 3. Co-designing

Definition of Practice: This involves integrating different therapeutic approaches to create personalized wellness plans.

Theme Connection: Co-designing extends this idea by involving customers in crafting services that incorporate their preferences and needs.

Finding: Co-designing is evident in wellness tourism when customers participate in selecting or combining therapies, such as a mix of traditional Thai massage and modern aromatherapy, fostering a sense of ownership and satisfaction.

Activity 4. Co-learning

Definition of Practice: Colearning emphasizes shared knowledge development during interactions, where both customers and providers gain insights.

Theme Connection: Co-learning maintains the focus on knowledge exchange, highlighting the dynamic nature of value creation.

Finding: For example, a customer may learn about Thai herbal compresses, while providers understand customer preferences through feedback. This reciprocal knowledge enrichment strengthens the service relationship.

Activity 5. Co-adapting

Definition of Practice: This practice reflects flexibility and adaptation based on customer needs and feedback.

Theme Connection: Co-adapting underscores the iterative nature of modifying practices or services to align with customer expectations.

Finding: Providers might adapt treatment protocols based on customer input, such as altering session durations or focusing on specific health concerns, showcasing their commitment to personalized care.

Activity 6. Co-communicating

Definition of Practice: Connecting emphasizes building relationships and fostering emotional bonds between customers and providers.

Theme Connection: Co-communicating builds on this by highlighting open dialogue and ongoing interaction.

Discussion: Effective communication is critical during all stages of the customer journey in wellness tourism, from initial inquiries to post-service follow-ups. Emotional connections can enhance customer loyalty and satisfaction.

Activity 7. Co-participating

Definition of Practice: Coproduction involves customers actively engaging in the creation and delivery of services.

Theme Connection: Co-participating emphasizes the customer's proactive role in shaping the service experience.

Finding: For instance, in wellness spas, customers actively participate by choosing their treatments, adjusting settings, or providing real-time feedback during sessions, making them partners in value creation.

Activity 8. Co-branding

Definition of Practice: Cerebral activities refer to mental and emotional efforts customers invest in shaping the value they derive.

Theme Connection: Co-branding connects the co-creation of a shared identity or reputation through collaborative experiences.

Finding: Customers who feel invested in the service may advocate for the brand, becoming ambassadors and enhancing its reputation. For example, sharing positive experiences on social media or recommending services aligns customer satisfaction with brand-building.

In line with prior research (Bueno et al 2019; Ferguson, Paulin & Bergeron 2010), this study conceptualizes the customer experience into three stages: **before service** (pre-purchase), **during service** (purchase), and **after service** (post-purchase). The analysis emphasizes the levels of interaction and the types of co-creation activities at each stage as in Figure 1.

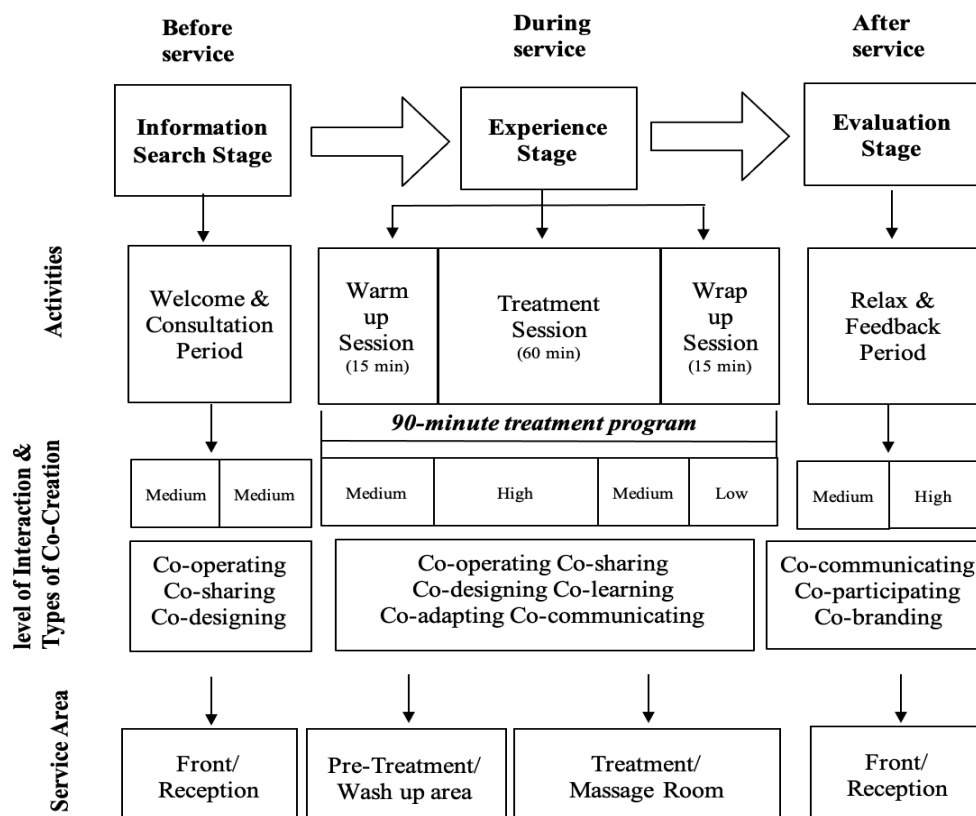


Figure 1: An illustration of before-during-after service of customer wellness journey

Before Service: Information Search Stage

The information search marks the initial point of contact between the customer and the service provider. This interaction typically occurs at the spa's front office, either in person or remotely (via phone or email), as customers gather information on service offerings and make purchasing decisions. Customers seek clarity on services to fulfill cognitive needs, as outlined by Yi and Gong (2013).

Interactions during this stage range from low to medium intensity and involve co-creation processes such as **co-learning**, **collating**, and **combining complementary services**.

A hotel spa manager described this stage:

"When customers share their health concerns and preferences, we listen attentively and tailor our suggestions to their needs. By understanding their expectations, we can adapt existing services or combine treatments to provide optimal solutions."

During Service: Experience Stage

The experience stage encompasses all customer interactions with the spa and its environment during their visit, including warm-up, treatment, and wrap-up sessions. Interaction levels fluctuate, beginning at medium during warm-up, decreasing during deep relaxation phases of treatment, and returning to medium during the wrap-up. Managing these interactions effectively enables co-creation opportunities to occur. These include **co-learning, collating, cooperating, and co-production** (Jaakkola & Alexander 2014).

As noted by a medical spa manager: "Providing a customized spa experience requires listening carefully to customers and involving them in the design of treatments. Building trust from the start is key, and sincerity fosters long-term relationships. Service is personal—there's no one-size-fits-all approach."

A destination spa manager added: "Customers often come with specific needs and expect individualized services. By treating them as partners and respecting their input, we co-create treatments that suit their preferences, fostering loyalty and enhancing expertise across diverse customer groups."

After Service: Evaluation Stage

Following the treatment, customers engage in post-purchase behaviors such as usage, feedback provision, and connection with others. Interaction levels at this stage are medium to high, with co-creation activities including **co-learning, collating**, and opportunities for customers to connect with friends, family, or other professionals.

A day spa manager highlighted: "We actively gather feedback from customers, learning their likes and dislikes. By continuously assessing their input, we refine our offerings and design services that cater to diverse preferences."

A hotel spa manager emphasized the role of referrals: "Satisfied customers often recommend our services to their loved ones, collaborating with us to ensure the recommended experiences meet expectations. This cycle of satisfaction and feedback has helped us retain loyal customers for years."

The findings reveal that customer engagement behaviors significantly shape the co-creation process in wellness tourism. Pre-service interactions, such as information seeking and booking, set the tone for customer expectations. During the service, personal interactions and feedback contribute to the customization and enhancement of wellness experiences. Post-service engagement, including advocacy and repeat visits, demonstrates the impact of co-creation on customer satisfaction and loyalty.

Furthermore, Thailand's cultural identity plays a pivotal role in attracting wellness tourists and enhancing the authenticity of the co-creation experience. Stakeholders in wellness tourism can leverage these insights to design culturally immersive and customer-centric services that align with global wellness trends.

The findings underscore the importance of managing customer interactions across all stages to facilitate meaningful co-creation, strengthen relationships, and ensure long-term business success.

This research contributes to the theoretical understanding of value co-creation in wellness tourism and offers practical insights for industry stakeholders in Thailand and beyond.

5. Discussion

As customers pursue personalized health benefits, they engage in diverse co-creation activities with service providers, characterized by varying levels of interaction at different stages of the service journey. These interactions not only foster value co-creation but also drive service innovation by integrating the unique cultural and natural resources of the destination with health tourism offerings. The findings emphasize the critical role of communication in successful customer co-creation, aligning with prior research that highlights intensive customer-service provider interactions as key to new service or product success (McManus & Ardley 2019). Value co-creation involves the service provider offering superior value propositions, with customers determining value through consumption (Payne et al 2008). In service industries, customer interaction is a recognized factor for innovation performance (Carbonell et al 2009; Hu et al 2009). Mathis et al (2016) state that travelers who engage in co-creation report more positive vacation experiences and demonstrate greater loyalty to service providers. Effectively managing these interactions maximizes customer lifetime value and fosters collaborative innovation, which results in benefits such as cost savings, improved service alignment with customer needs, and stronger customer relationships (Hoyer et al 2010). These interactions emphasize that value co-creation in health and wellness services is a multidimensional process involving active customer engagement. Each practice aligns with a theme to create a cohesive framework:

- Co-operating focuses on mutual collaboration for shared success.
- Co-sharing highlights the importance of transparent communication.
- Co-designing empowers customers to shape their service experiences.
- Co-learning fosters mutual knowledge development.
- Co-adapting ensures flexibility to meet evolving customer needs.
- Co-communicating builds trust and long-term relationships.
- Co-participating emphasizes customer agency in service delivery.
- Co-branding transforms customers into advocates, reinforcing brand equity.

By weaving these practices and themes into operational strategies, providers can ensure holistic and sustainable value co-creation, particularly in wellness tourism where personalization, cultural authenticity, and customer-provider synergy are paramount.

6. Conclusions

This study offers key strategies for wellness service providers to enhance co-creation and customer engagement. First, providers should actively involve customers in the co-creation process to enhance personalization. Second, they should evaluate the service journey from both customer and supplier perspectives, identifying key activities, levels of interaction, and co-creation opportunities at each stage. Finally, pinpointing critical touchpoints that facilitate co-creation throughout the service journey can help create a seamless and engaging experience. By implementing these strategies, wellness tourism stakeholders can foster a more sustainable and competitive industry that aligns with customer expectations. Co-creation fosters a sense of ownership and emotional connection, which are essential for enhancing customer satisfaction and brand loyalty. Integrating co-creation strategies can help wellness tourism providers strengthen customer relationships, differentiate their services, and ensure long-term business sustainability in an increasingly competitive market.

Positive interactions between customers and service providers contribute to greater satisfaction, well-being, and long-term engagement, underscoring the importance of co-creation in delivering high-quality wellness experiences. As the industry evolves, consumer preferences are shifting toward more personalized and interactive service offerings. This research provides practical insights into how businesses can integrate co-creation into their service models, supporting sustainable tourism development. By analyzing customer engagement within Thailand's wellness tourism sector, this study highlights how interactions between customers and service providers unfold before, during, and after the experience. Ultimately, it emphasizes co-creation as a dynamic and collaborative process that enhances customer satisfaction and drives long-term business success.

To remain competitive, wellness destinations must prioritize designing transformative and emotionally engaging experiences. Rather than offering standardized services, providers should adopt an experience-driven, personalized approach that fosters customer well-being and deepens emotional connections. The findings of this study can help wellness tourism businesses refine their strategies, develop interactive platforms, and create opportunities for customers to be actively involved—both physically and emotionally—throughout their wellness journey.

Ethics Declaration: This study was conducted in accordance with ethical guidelines and was approved by the Ethics Committee of Srinakharinwirot University, Thailand. Ethical clearance was obtained prior to data collection, ensuring compliance with relevant ethical standards.

AI Declaration: No artificial intelligence (AI) tools were used in the conceptualization, research, writing, or editing of this paper. All content was developed solely by the authors.

References

- Attride-Stirling, J. (2001). "Thematic Networks: An Analytic Tool for Qualitative Research," *Qualitative Research*, Vol. 1, No. 3, pp. 385–405. <https://doi.org/10.1177/146879410100100307>
- Bettencourt, L.A. (1997). "Customer Voluntary Performance: Customers as Partners in Service Delivery," *Journal of Retailing*, Vol. 73, No. 3, pp. 383–406. [https://doi.org/10.1016/S0022-4359\(97\)90024-5](https://doi.org/10.1016/S0022-4359(97)90024-5)
- Braun, V. and Clarke, V. (2014). "Using Thematic Analysis in Psychology," *Qualitative Research in Psychology*, Vol. 3, No. 2, pp. 77–101. <https://doi.org/10.1191/1478088706qp0630a>
- Bueno, E.V., Weber, T.B.B., Bomfim, E.L. and Kato, H.T. (2019). "Measuring Customer Experience in Service: A Systematic Review," *The Service Industries Journal*, Vol. 39, Nos. 11–12, pp. 779–798.

- Carbonell, P., Rodríguez-Escudero, A.I. and Pujari, D. (2009). "Customer Involvement in New Service Development: An Examination of Antecedents and Outcomes," *Journal of Product Innovation Management*, Vol. 26, No. 5, pp. 536–550. <https://doi.org/10.1111/j.1540-5885.2009.00679.x>
- Chaulagain, S., Pizam, A. and Wang, Y. (2021). "An Integrated Behavioral Model for Medical Tourism: An American Perspective," *Journal of Travel Research*, Vol. 60, pp. 761–778.
- Choi, J., Kim, A., Lee, H. and Hickerson, B. (2015). "Wellness Tourism: The Effects of Involvement, Wellness Tourism Benefits, and Tourist Satisfaction on Quality of Life," *Journal of Travel & Tourism Marketing*, Vol. 32, No. S1, pp. 46–62. <https://doi.org/10.1080/10548408.2014.997958>
- Choi, J., Kim, A. and Lee, H. (2020). "Wellness Tourism Trends in the Post-Pandemic Era," *Journal of Travel Research*, Vol. 59, No. 7, pp. 889–906.
- Dini, M. and Pencarelli, T. (2021). "Wellness Tourism and the Components of Its Offer System: A Holistic Perspective," *Tourism Review*, Vol. 77, No. 2, pp. 394–412.
- Dillette, A.K., Douglas, A.C. and Andrzejewski, C. (2021). "Dimensions of Holistic Wellness as a Result of International Wellness Tourism Experiences," *Current Issues in Tourism*, Vol. 24, No. 6, pp. 794–810.
- Ennew, C.T. and Binks, M.R. (1999). "Impact of Participative Service Relationships on Quality, Satisfaction and Retention: An Exploratory Study," *Journal of Business Research*, Vol. 46, No. 2, pp. 121–132. [https://doi.org/10.1016/S0148-2963\(98\)00016-2](https://doi.org/10.1016/S0148-2963(98)00016-2)
- Ferguson, R.J., Paulin, M. and Bergeron, J. (2010). "Customer Sociability and the Total Service Experience: Antecedents of Positive Word-of-Mouth Intentions," *Journal of Service Management*, Vol. 21, No. 1, pp. 25–44.
- Pongwat, A., Sun, S. and Law, R. (2024). "Co-Creation in Wellness Tourism," *Journal of Hospitality & Tourism*, Vol. 22, No. 1.
- Gallan, A.S., Jarvis, C.B., Brown, S.W. and Bitner, M.J. (2013). "Customer Positivity and Participation in Services: An Empirical Test in a Health Care Context," *Journal of the Academy of Marketing Science*, Vol. 41, No. 3, pp. 338–356. <https://doi.org/10.1007/s11747-012-0307-4>
- GW (2018). *Global Wellness Economy Monitor*. <https://globalwellnessinstitute.org/industry-research/global-wellness-tourism-economy/>
- GW (2023). *Global Wellness Economy Monitor*. https://globalwellnessinstitute.org/wp-content/uploads/2023/11/GWI-WE-Monitor-2023_FINAL.pdf
- GW (2014). *Global Wellness Economy Monitor 2024*. <https://globalwellnessinstitute.org/geography-of-wellness/wellness-in-thailand/>
- Grönroos, C. (2011). "Value Co-Creation in Service Logic: A Critical Analysis," *Marketing Theory*, Vol. 11, No. 3, pp. 279–301. <https://doi.org/10.1177/1470593111408177>
- He, M., Liu, B. and Li, Y. (2021). "Tourist Inspiration: How the Wellness Tourism Experience Inspires Tourist Engagement," *Journal of Hospitality & Tourism Research*, forthcoming, pp. 1–21.
- Hoyer, W.D., Chandy, R., Dorotic, M., Krafft, M. and Singh, S.S. (2010). "Consumer Co-Creation in New Product Development," *Journal of Service Research*, Vol. 13, No. 3, pp. 283–296. <https://doi.org/10.1177/1094670510375604>
- Jaakkola, E. and Alexander, M. (2014). "The Role of Customer Engagement Behavior in Value Co-Creation: A Service System Perspective," *Journal of Service Research*, Vol. 17, No. 3, pp. 247–261. <https://doi.org/10.1177/1094670514529187>
- Jackson, S.J., Sam, M.P. and Dawson, M.C. (2024). "The Contested Terrain of Sport and Well-Being: Health and Wellness or Wellbeing Washing?" *Social Sciences*, Vol. 13, No. 7, pp. 366. <https://doi.org/10.3390/socsci13070366>
- Kim, E., Chiang, L. and Tang, L. (2017). "Investigating Wellness Tourists' Motivation, Engagement, and Loyalty: In Search of the Missing Link," *Journal of Travel & Tourism Marketing*, Vol. 34, pp. 867–879.
- Marshall, C. and Rossman, G.B. (2014). *Designing Qualitative Research*. Sage Publications.
- Mathis, E.F., Kim, H.L., Uysal, M., Sirgy, J.M. and Prebensen, N.K. (2016). "The Effect of Co-Creation Experience on Outcome Variable," *Annals of Tourism Research*, Vol. 57, pp. 62–75.
- McColl-Kennedy, J.R., Vargo, S.L., Dagger, T.S., Sweeney, J.C. and van Kasteren, Y. (2012). "Health Care Customer Value Cocreation Practice Styles," *Journal of Service Research*, Vol. 15, No. 4, pp. 370–389. <https://doi.org/10.1177/1094670512442806>
- McManus, S. and Ardley, B. (2019). "Customer Co-Creation and Service Innovation: A Study of Value Co-Creation in Health Tourism," *Tourism Review*, Vol. 74, No. 5, pp. 1000–1015.
- Meeprom, S. and Chancharat, S. (2022). "Building Health and Wellness Service Experience Extension: A Case Study of Bangkok, Thailand," *Sustainability*, Vol. 14, No. 18, p. 11691. <https://doi.org/10.3390/su141811691>
- Nangpiire, C., Silva, J. and Alves, H. (2022). "Customer Engagement and Value Co-Creation/Destruction: The Internal Fostering and Hindering Factors and Actors in the Tourist/Hotel Experience," *Journal of Research in Interactive Marketing*, Vol. 16, No. 2, pp. 173–188.
- Payne, A.F., Storbacka, K. and Frow, P. (2008). "Managing the Co-Creation of Value," *Journal of the Academy of Marketing Science*, Vol. 36, No. 1, pp. 83–96. <https://doi.org/10.1007/s11747-007-0070-0>
- Romero, J. (2017). "Customer Engagement Behaviors in Hospitality: Customer-Based Antecedents," *Journal of Hospitality Marketing & Management*, Vol. 26, No. 6, pp. 565–584. <https://doi.org/10.1080/19368623.2017.1288192>
- Seyfi, S., Rasoolimanesh, S.M., Vafaei-Zadeh, A. and Esfandiari, K. (2024). "Can Tourist Engagement Enhance Tourist Behavioural Intentions? A Combination of PLS-SEM and fsQCA Approaches," *Tourism Recreation Research*, Vol. 49, No. 1, pp. 63–74.
- So, K.K.F. and Li, X. (2020). "Customer Engagement in Hospitality and Tourism Services," *Journal of Hospitality & Tourism Research*, Vol. 44, No. 2, pp. 171–177. <https://doi.org/10.1177/1096348019900010>

- Vargo, S.L. and Lusch, R.F. (2008). "Service-Dominant Logic: Continuing the Evolution," *Journal of the Academy of Marketing Science*, Vol. 36, No. 1, pp. 1–10. <https://doi.org/10.1007/s11747-007-0069-6>
- Vargo, S.L. and Lusch, R.F. (2016). "Institutions and Axioms: An Extension and Update of Service-Dominant Logic," *Journal of the Academy of Marketing Science*, Vol. 44, pp. 5–23.
- World Tourism Organization. (2018). *Global Report on Health Tourism*. UNWTO.
- Wray, M., Dredge, D. and Cox, C. (2010). "Sustainable Tourism Planning for Regional Destinations: An Overview," *Journal of Sustainable Tourism*, Vol. 18, No. 1, pp. 3–17. <https://doi.org/10.1080/09669580903395166>
- Xie, L., Guan, X., He, Y. and Huan, T.C. (2022). "Wellness Tourism: Customer-Perceived Value on Customer Engagement," *Tourism Review*, Vol. 77, No. 3, pp. 859–876.
- Yi, Y. and Gong, T. (2013). Customer value co-creation behavior: Scale development and validation. *Journal of Business Research*, 66(9), 1279–1284. <https://doi.org/10.1016/j.jbusres.2012.02.026>

Social Impacts of Tourism in the Pantanos de Villa Wildlife Refuge (Peru)

Sophia Espinoza, Nathaly Gonzales and Brendali Carrillo

Universidad Peruana de Ciencias Aplicadas, Lima, Peru

u201914201@upc.edu.pe

u201810225@upc.edu.pe

brendali.carrillo@upc.pe

Abstract: Protected areas (PAs) have a unique value that relies on their high biological and cultural diversity, as well as their scenic beauty. Thus, they attract a large flow of tourists with recreational and/or educational purposes. The profits obtained from tourism support the PAs' objective which is to preserve its natural and cultural resources and ensure its sustainable development, including the maximisation of benefits for the local communities. Nevertheless, inefficiencies in the tourism management of PAs can produce negative social outcomes, such as pollution or disparity in the distribution of economic benefits, negatively affecting residents' quality of life. The Pantanos de Villa Wildlife Refuge (PVWR) is one of the most visited PAs in Peru and the only one located in an urban environment, which represents a challenge in its sustainable tourism management, especially in the social aspect. This research analysed the social impact of tourism in the PVWR, as perceived by residents located in its buffer zone. The study applied a qualitative methodology based on semi-structured in-depth interviews to 14 residents that allowed them to share their personal experiences with the social impacts identified in the literature and one non-academic source of evidence of the population's comfort/discomfort with tourism. The study revealed 11 social impacts of tourism about which participants have a predominantly positive perception. For instance, participants agree that tourism promotes environmental education and improves public infrastructure, while a strong sense of belonging and pride was perceived among them. Nonetheless, participants have diverse perceptions of three social impacts, namely: employment and economic growth, citizen security, and opportunities for cultural exchange, possible indications of an unequal distribution of benefits or differing level of involvement of residents in the tourism activity. This is one of a few studies that addresses the impacts of tourism in PAs in Peru focusing on the social dimension, as most research focuses on the environmental one. In terms of practical contributions, the study suggests specific actions that the local authorities may apply to maximise the positive social impacts of tourism for all residents of the PVWR.

Keywords: Residents' perception, Social impact, Tourism, Pantanos de Villa Wildlife Refuge, Protected areas, Peru

1. Introduction

Protected areas (PAs) have a unique value that differentiates them from other tourism sites due to their high biological and cultural diversity (Servicio Nacional de Áreas Naturales Protegidas por el Estado [SERNANP], 2016). These areas have a tourism application, as they offer opportunities for recreation and education, which allows for a greater recognition of the destination and a steady source of income for the area (Spenceley, Snyman and Ryland, 2019). PAs are usually open to the public and have optimal accessibility, thus attracting a large number of tourists, which impacts residents' livelihoods (Malchrowicz-Moško, Botiková and Pocztá, 2019). In this context, social impact refers to the positive and negative changes in the quality of life of people in a community due to their interaction with tourists at their place of residence (Inter-American Development Bank [IDB], 2018; Leung et al., 2019).

Tourism in PAs should meet the main objectives of these places, such as increasing employment opportunities and improving the quality of life of nearby residents (Martín Martín et al., 2019). Some positive social impacts of tourism are the dynamization of the economy in the area and the improvement of basic services like education, electricity, water, etc. (Custodio and Maldonado-Oré, 2020). Tourism also stimulates local cultural identity and promotes environmental education among residents (Khan and Bhagwat, 2010). However, uncontrolled tourism can also negatively affect communities adjacent to PAs by causing the loss of their cultural values (Gonzales, Vargas and Zizumbo, 2021) and generating a sense of invasion among residents (Malchrowicz-Moško, Botiková and Pocztá, 2019), which incites them to reject visitors and tourism in general (Stylidis et al., 2024).

Studies on the impact of tourism in Peru's PAs are scarce and tend to focus on economic and environmental aspects, leaving aside the social aspect. Such is the case of the Pantanos de Villa Wildlife Refuge (PVWR), where environmental studies have been prioritised due to its great biological diversity (Cogorno, 2021; Serrano Pazos, 2020). However, international literature calls for studies that explore the complex relationships between PAs and the surrounding communities (Malchrowicz-Moško, Botiková and Pocztá, 2019). This research seeks to fill this theoretical gap and sets as its main objective to analyse the social impacts of tourism

as perceived by residents of the PVWR, using a qualitative methodology based on semi-structured in-depth interviews.

This PA was chosen as a case study because it is the only PA in Peru that is located in an urban environment, in Lima, the nation's capital, which posits challenges in its sustainable tourism management (Serrano Pazos, 2020). This affirmation is based on research findings claiming that tourist destinations located in urban environments suffer greater negative social impacts than other destinations, such as increased crime, due to overcrowding (Almeida-García *et al.*, 2021; Leung *et al.*, 2019). Regarding the practical contribution, this research will provide the PVWR authorities with valuable information for an inclusive tourism management that generates sustainable benefits for people in surrounding communities. In addition, residents will have a better understanding of how tourism impacts their lives to advocate for the design of policies and regulations that contribute to the sustainable tourism development of their community.

2. Literature Review

2.1 Protected Areas and their Relationship to Tourism

PAs are geographic areas managed through legal measures or other effective methods for the maintenance and protection of the natural and cultural resources associated with them (Unión Internacional para la Conservación de la Naturaleza [UICN], 2003). These areas are distinguished by their high biodiversity (Leung *et al.*, 2019; SERNANP, 2016), therefore, they should be chosen carefully and strategically, since, when declared as such, they become representatives of a country's natural heritage (SERNANP, 2016; Solano, 2020). PAs also stand out for providing ecosystem services to the population from the ecological processes that take place in them, such as soil formation, oxygen production and water purification (Wei *et al.*, 2020). Such ecosystem services make these areas conducive to research, environmental education and recreation (Martín Martín *et al.*, 2019).

Most PAs have a tourist application, as they usually have a recreational and educational focus, which generates greater recognition of the destination and a constant source of income to preserve the place (Spenceley, Snyman and Rylance, 2019). Therefore, PAs delineate specific areas for tourism activities such as boating, outdoor games, camping, bird watching, cycling, horseback riding and artisanal fishing, which, if not properly managed, can negatively affect biodiversity, vegetation cover, water and soil in that area (Canteiro, Córdova-Tapia and Brazeiro, 2018). Tourism in PAs is committed to conserving their natural resources, sensitizing tourists about their importance, and generating economic benefits that improve residents' quality of life (Custodio and Maldonado-Oré, 2020). The participation of residents in PAs is important for tourism development, since they are the main labour force in restaurants, travel agencies and lodging companies; therefore, their commitment and participation are fundamental for carrying out a good relationship between tourism and conservation in PAs (Chávez-Dagostino *et al.*, 2015).

2.2 Social Impacts of Tourism in Protected Areas

The social impacts of tourism refer to the positive or negative changes in the quality of life of people in a community due to their interaction with tourists at their place of residence (IDB, 2018; Leung *et al.*, 2019). Social impact is usually related to the economic and cultural impacts (Alamineh *et al.*, 2023). Some examples of this relationship are that tourism generates jobs that impact the household economy of residents, and, in addition, tourism offers residents the opportunity to share their traditions with the tourists, and thus collaborates with preserving their cultural values (McGinlay *et al.*, 2023).

Therefore, it is necessary to conduct social-impact studies in tourism from the residents' perspective, to identify in time the government initiatives that are effective, and to stop those that are failing to be inclusive of the local community (Abukari and Mwalyosi, 2020). The value of such studies is that they often reveal the residents' willingness to engage in tourism and to participate in conservation activities in PAs (Khan and Bhagwat, 2010). The positive and negative social impacts identified in the literature are presented below, along with Indications of social impacts in the study area.

2.2.1 Positive social impacts

PAs seek to improve the livelihoods of local communities by promoting tourism development and protecting local nature and culture (Gonzales, Vargas and Zizumbo, 2021). In this context, tourism functions as a strategy to foster job opportunities and economic growth, which promotes a positive attitude on the part of locals towards tourist activities (McGinlay *et al.*, 2023). Citizen security is a basic requirement for tourism

development in PAs, which not only benefits visitors, but also has a positive effect on the quality of life of residents in surrounding areas, and even promotes the return of former residents (Hsu, Lin and Jhang, 2020).

Leung *et al.* (2019) identified that tourism in PAs fosters environmental education, as it involves visitors and residents in tourism activities that promote awareness and concern for the preservation of the area's natural and cultural resources. However, planning is fundamental in tourism to attain sustainable development and serve as a stimulus for the preservation and protection of PAs (Martín Martín *et al.*, 2019). Residents recognise that tourism generates diverse social and cultural benefits, such as fostering cultural pride and identity, revitalizing indigenous traditions, promoting the exchange of knowledge, culture, ways of life and languages, and enhancing the community's image (McGinlay *et al.*, 2023; Schmudde, 2015).

Tourism also promotes the development of public infrastructure, since it is necessary to invest in equipment, facilities and infrastructure, which will also be used by the local population, to develop tourism activities (Bennet *et al.*, 2012). In addition, tourism increases the demand for more qualified employment, which promotes an improvement in the education and training of the workforce (Abukari and Mwalyosi, 2020). A study conducted in the PVWR revealed that one of the positive social impacts generated by tourism is that it is a source income for residents (Flores Parihuamán, 2021). In addition, residents perceive that tourism promotes environmental education and manifest their pride in witnessing a part of the life cycle of birds in the PVWR (PROHVILLA, 2022).

2.2.2 Negative social impacts

One of the main negative social impacts of tourism is that residents develop a sense of invasion, especially in the peak tourism season (Malchrowicz-Moško, Botiková and Poczta, 2019), causing the visitors' recreational experience to be negative in terms of the attitudes of residents, regardless of the scenic or natural attractions of the destination visited. Another negative social impact is the pollution produced by tourists, causing inconvenience to residents (Leung *et al.*, 2019).

There is also the "demonstration effect", which happens when residents experience a loss of cultural identity due to tourism, which often affects many developing countries, where the culture of tourists is often perceived as superior to the local one, causing changes in the attitudes, behaviours and values of residents (Leung *et al.*, 2019). In addition, the inauguration of tourist infrastructures (e.g., lodges) around PAs affects the scenic beauty of the site (Martín Martín *et al.*, 2019). Specifically, a study by PROHVILLA (2022), the authority in charge of the conservation of the site, found that residents feel rejection towards unfinished tourism infrastructure in their locality. It also revealed a concern about the overnight camps promoted by PROHVILLA, as they expose tourists to insecurity and negatively impact the image of the place.

3. Methodology

The research applied a qualitative methodology based on semi-structured interviews, which allows for an understanding of the phenomena from the perspective of the participants in their natural environment (Hernández *et al.*, 2014). The study population was comprised of residents of the buffer zone of the PVWR. The sample was of volunteer participants, who told their experiences and expressed their perceptions of the social impacts consulted about. The participant recruitment strategy involved three actions. First, the identification of gatekeepers (i.e., influential individuals within the community) through the social network Facebook. Second, the posting of invitation announcements on Facebook groups of the PVWR residents. The third action was to request the support of PROHVILLA for support in the dissemination of the study. Snowball sampling was applied, and the sample size was defined following the category saturation criterion (Hernández *et al.*, 2014).

Regarding the design of the data collection instrument (i.e., interview protocol), the Gioia three-step methodology was applied to identify the social impacts of tourism in PAs, in which (1) evidence of social impacts of tourism in PAs was extracted from the literature; (2) statements summarizing these impacts were constructed; and (3) a label or name was assigned to them (Gioia, Corley and Hamilton, 2013). The literature considered for analysis were mainly the studies of Abukari and Mwalyosi (2020), Leung *et al.* (2019), Martín Martín *et al.* (2019), Hsu, Lin and Jhang (2020), Khan and Bhagwat (2010), McGinlay *et al.* (2023) and Schmudde (2015), which provide evidence of social impacts caused by tourism in PAs in different geographical contexts. Additionally, information from local sources was included, such as the thesis of Flores Parihuamán (2021) and the conversation on tourism carried out by the local authorities (PROHVILLA, 2022), in which residents' opinions about the social impacts of tourism in their locality emerged. The latter sources could not

be overlooked, since they are the only indications of positive and negative impacts of tourism perceived by the residents of this PA. The above resulted in a list of 11 social impacts generated by tourism in PAs, which can be either positive or negative depending on the context in which they take place (e.g., strengthening or loss of cultural identity). These are: environmental education, employment and economic growth, education and labour training, cultural identity, cultural exchange, public infrastructure, social discontent due to contamination, sense of invasion, site image, scenic beauty, and citizen security.

The semi-structured interview consisted of 16 open-ended questions and spontaneous questions were added when it was necessary to delve into a certain topic. Pilot tests were conducted with 4 residents near a natural tourist site, after which adjustments were made to the instrument prior to its application. At the beginning of each interview, participants received general information about the study and their informed consent was requested. The interviews were conducted through the Google Meet platform during April of 2024 and were audio and video recorded. Each participant was assigned a code and number to ensure the confidentiality of their responses (i.e., P#). The interviews were transcribed, analysed and organised in an Excel table, which revealed the positive and negative perceptions of participants' about each impact. The researchers met twice a week for a period of two months for data analysis.

4. Results and Discussion

The analysis revealed a predominantly positive perception of the impacts of tourism on the PVWR by residents, which are detailed below (Synthesis in table 1).

Environmental education: Participants agreed that the activities carried out at the PVWR seek to preserve the biodiversity and habitat of the site while encouraging sustainable tourism. Among the main activities that promote environmental education in the area, it is the guided tours and the scientific excursions. Most interviewees declared having participated in the guided tours and commented: "I was able to learn something about how to take care of the flora and fauna of the place" (P7). This finding is consistent with Leung *et al.* (2019), who uphold that tourism promotes knowledge of natural resources and environmental awareness. However, some participants indicated that, although a progressive increase in environmental culture is perceived among residents of the buffer zone, this change does not encompass everyone.

Employment and economic growth: Most participants mentioned that there are two jobs directly related to tourism within the PAs: tourist guides, which is mainly occupied by locals with university or technical studies, and park rangers. In addition, a strong presence of artisans stands out in the surroundings of the PVWR. However, a minority of participants stated that "there are very few locals who have a job related to tourism" (P6). This difference in opinions may be due to there not being enough jobs directly related to tourism available for residents (Abukari and Mwalyosi, 2020).

Education and labour training: Some participants indicated that there are new educational institutions near the PVWR that use the PA as an area for academic and scientific education and research. Most participants indicated that tourism promotes workforce training, as there are jobs within the PA for people with higher and/or technical education. However, it is not known whether PA managers invest in the professional development of their workers, this being a highly valued benefit by PA residents (Spenceley, Snyman and Rylance, 2019). Regarding the production of handicrafts, it is stated that it is not essential to have training, as knowledge is passed from generation to generation.

Cultural identity: Participants feel identified with the PA and take pride in residing near an area that attracts visitors, both national and international. However, taking pride in being a resident of the buffer zone of the PVWR not only lies in having a constant flow of tourists, but also in the recognition, importance and natural value of the PA. This same sense of pride and sense of belonging was identified among residents of the Eifel National Park in Germany (Mcginlay *et al.*, 2023).

Cultural exchange: Most participants had not interacted with tourists visiting the area, since "the communities are not part of the tourist circuit" (P10) and "tourists are not interested in the surrounding areas, but in the attraction itself and the activities that take place within the area" (P2). However, research shows that tourists do have an interest in learning about the lifestyle of the communities surrounding the PAs (Tapa, 2013). Therefore, travel agencies and managers of the PVWR could design activities that include locals in tourist circuits.

Public infrastructure: Most participants recognise improvements in public infrastructure and ascribe this to tourism. Specifically, they perceive an improvement in green areas, signage, and lanes for the arrival of tourist

buses. The public transportation option and the existence of a bicycle lane that facilitates access to the area are highlighted. The improvement of street lighting was also highlighted. However, participants reiterated their concern about the state of paralysis of some public works, as expressed in the conversation with PROHVILLA (2022).

Dissatisfaction with contamination: Participants indicated that there is good waste management and control in and around the PVWR, they perceive that “there is pollution, but not because of tourism” (P06). In fact, they highlight the environmental awareness of tourists and attribute the responsibility for this problem to the locals. This finding differs from Gosh, Sharma and Gupta (2022) study in a PA in Bali where locals perceived that tourism caused an increase in water pollution and litter.

Sense of invasion: “It is flattering that tourists come” (P10). This statement suggests a positive and open attitude towards visitors, therefore, there is no feeling of invasion, unlike what was found by Malchrowicz-Moško, Botiková and Poczta (2019). This difference could be because the PVWR is not a mass-tourism destination, whereas the PAs in the cited study host mass sports events. Only one participant mentioned that the agglomeration of tourists discourages him to visit the PA. Others fear that the tourist attraction of the PA could provoke invasions or disorderly urbanization.

Site image: Most participants emphasised that tourism activities in the area are carried out in a sustainable manner under the supervision of public entities. Apaza-Panca, Flores Quevedo and Carranza Reyes (2024) affirm that all actions that contribute to the sustainable use of the area are part of a “green marketing” strategy that enhances the value and image of the PA. However, a minority of participants considered that deficiencies in public safety could negatively affect the site's image.

Scenic beauty: Most participants identified a few tourism businesses (i.e., lodging, restaurants and travel agencies) in the area, which they consider positive, but this might only be because these businesses do not abound and therefore, they do not affect the scenic beauty of the site (Martín Martín *et al.*, 2019). However, some participants pointed out to the need to open more tourism businesses if they do not affect the conservation of the PA.

Citizen security: It is stated that “since there is tourism, there are funds to hire security” (P14), indicating that tourism contributes economically to increase security in the area. However, some participants do not perceive this improvement. This difference could be explained by the area in which participants live, since some have more surveillance and lighting, which translates as perceived security. In this study, the concern raised by residents two years ago about overnight camps that could put the safety of tourists at risk was raised again, which is something to look after (PROHVILLA, 2022).

Table 1: Participants’ perception of social impacts of tourism in the PVWR*

Social impact	Perception			Result
	Positive	Negative	Unbiased	
Environmental education	13	0	1	Increased environmental education.
Employment and economic growth	8	6	0	Tourism-related jobs available but scarce.
Education and labour training	11	0	3	Improved access to education and training.
Cultural identity	12	0	2	Strong cultural identity.
Cultural exchange	7	7	0	Few opportunities for cultural exchange.
Public infrastructure	10	2	2	Improved public infrastructure but discontent with unfinished projects.
Dissatisfaction with contamination	14	0	0	Pollution is not caused by tourism.
Sense of invasion	12	0	2	There is no sense of invasion.
Site image	10	0	4	Positive image but at risk.
Scenic beauty	14	0	0	Not affected by tourism.
Citizen security	5	0	9	Opposed perceptions of safety.

*Number of participants: 14

5. Conclusions and Recommendations

The general objective of this study was to analyse the social impacts of tourism based on the perception of the residents of the PVWR. The study applied a qualitative methodology based on semi-structured in-depth interviews with 14 residents of the buffer zone of the PVWR. The literature review revealed 11 social impacts generated by tourism in PAs, about which participants were consulted.

Findings show that participants generally have a positive opinion about most of the social impacts generated by tourism in the area (8 out of 11). It is perceived that the managing entities of the PVWR are working to improve the environmental education of the local population and of visitors. There is an increase in the education and training of the labour force. Participants showed a strong cultural identity. Improvements in public infrastructure due to increased tourism are recognised. Tourism is not considered a cause of pollution in the area and there is no sense of invasion. Tourism improves the image of this PA, and its related businesses do not affect the scenic beauty of the area.

Nevertheless, participants had contrary or unbiased opinions about 3 social impacts. They stated not having many opportunities for cultural exchange, but willingness to do so. Regarding citizen security, some consider that this has improved thanks to tourism, while others do not perceive it. There is an increase in jobs due to the leisure and recreation offer near the tourist destination; however, tourism-related jobs are still scarce.

Participants showed willingness to engage in cultural exchange, therefore, it is recommended that cultural events be held in public places to facilitate locals-tourists interaction. The identification of artisans in the area represents an opportunity to promote local art and revitalise their culture while generating income. Therefore, it is suggested the convenience of providing artisans with adequate space to sell their products at the entrance or exit of the PVWR. In addition, it is also recommended to identify new jobs that are directly or indirectly related to tourism, in which the villagers could participate, since few can access the positions of guides or park rangers.

Based on these findings, it is suggested that the local tourism authorities of the PVWR hold periodic meetings with residents to discuss the negative social impacts such as those identified. Academia could collaborate with the design of an instrument for the longitudinal study of impacts. This research offers authorities crucial information to improve the tourism management of this PA and provides residents with evidence of how tourism affects their lives, to advocate for their well-being and the sustainable development of their locality.

Acknowledgements

Dirección de Investigación de la Universidad Peruana de Ciencias Aplicadas E-038-2025.

References

- Abukari, H. and Mwalyosi, R.B. (2020) "Local communities' perceptions about the impact of protected areas on livelihoods and community development," *Global Ecology and Conservation*, 22, p. e00909. Available at: <https://doi.org/10.1016/J.GECCO.2020.E00909>.
- Alamineh, G.A. et al. (2023) "The local communities' perceptions on the social impact of tourism and its implication for sustainable development in Amhara regional state," *Heliyon*, 9(6), p. e17088. Available at: <https://doi.org/10.1016/J.HELIYON.2023.E17088>.
- Almeida-García, F., Cortés-Macías, R. and Parzych, K. (2021) "Tourism impacts, tourism-phobia and gentrification in historic centers: The cases of Málaga (Spain) and Gdansk (Poland)," *Sustainability (Switzerland)*, 13(1), pp. 1–25. Available at: <https://doi.org/10.3390/SU13010408>.
- Apaza-Panca, C.M., Flores Quevedo, L.A. and Carranza Reyes, L.M. (2024) "Green marketing to promote the natural protected area," *Sustainable Technology and Entrepreneurship*, 3(3), p. 100067. Available at: <https://doi.org/10.1016/J.STAE.2023.100067>.
- IDB (2018) *Evaluación del impacto social: Integrar las cuestiones sociales en los proyectos de desarrollo*. Banco Interamericano de Desarrollo. Available at: <http://dx.doi.org/10.18235/0012592> (Accessed: March 12, 2024).
- Bennett, N. et al. (2012) "A capital assets framework for appraising and building capacity for tourism development in aboriginal protected area gateway communities," *Tourism Management*, 33(4), pp. 752–766. Available at: <https://doi.org/10.1016/j.tourman.2011.08.009>.
- Canteiro, M., Córdova-Tapia, F. and Brazeiro, A. (2018) "Tourism impact assessment: A tool to evaluate the environmental impacts of touristic activities in Natural Protected Areas," *Tourism Management Perspectives*, 28, pp. 220–227. Available at: <https://doi.org/10.1016/J.TMP.2018.09.007>.
- Chávez-Dagostino, R.M. et al. (2015) "¿Puede el turismo alternativo potenciar el desarrollo local en Latinoamérica?," *Spanish Journal of Rural Development*, VI (Special 1), pp. 71–82.

- Corono Ventura, R.G. (2019) *Caos hídrico: el Acceso al Agua en El Humedal "Los Pantanos de Villa" en Chorrillos, (Lima)*. MA. Pontificia Universidad Católica del Perú. Available at: <http://hdl.handle.net/20.500.12404/18156>
- Flores Parihuamán, A.A. (2021) *Evaluación de los impactos del turismo educativo en los Pantanos de Villa y propuesta para mejorar sus efectos en favor del Área Natural Protegida*. BA. Universidad Científica del Sur. Available at: <https://doi.org/10.21142/TB.2021.1716>.
- Ghosh, A., Sharma, P. and Gupta, P. (2022) "Tourism and Pollution: Investigating Impact on Bali Island of Sunderbans Tiger Reserve, West Bengal, India," *Webology*, 19(1), pp. 2164–2169. Available at: <https://doi.org/10.14704/WEB/V19I1/WEB19146>.
- Gonzalez Estevez, N.G., Zizumbo Villarreal, L. and Vargas Martínez, E.E. (2021) "Prácticas turísticas en áreas naturales protegidas: su estudio desde enfoques críticos," *Ateliê Geográfico*, 15(3), pp. 27–48. Available at: <https://doi.org/10.5216/AG.V16I1.69932>.
- Hernández Sampieri, R., Fernández Collado, C. and Baptista Lucia, P. (2014) *Metodología de la Investigación*. 6th edn. McGraw-Hill Interamericana. Available at: <https://ebooks724.upc.elogim.com/stage.aspx?il=721&pg=&ed=>.
- Hsu, C.H., Lin, H.H. and Jhang, S. (2020) "Sustainable tourism development in protected areas of rivers and water sources: A case study of Jiuqu Stream in China," *Sustainability (Switzerland)*, 12(13). Available at: <https://doi.org/10.3390/SU12135262>.
- Khan, M.S. and Bhagwat, S.A. (2010) "Protected Areas: A Resource or Constraint for Local People?: A Study at Chitral Gol National Park, North-West Frontier Province, Pakistan," *Mountain Research and Development*, 30(1), p. 14. Available at: <https://doi.org/10.1659/MRD-JOURNAL-D-09-00024.1>.
- Leung, Y.-F. et al. (2019) *Directrices para la sostenibilidad*. Edited by C. Groves. Unión Internacional para la Conservación de la Naturaleza y los Recursos Naturales. Available at: www.iucn.org/pa_guidelines.
- Malchrowicz-Moško, E., Botiková, Z. and Pocza, J. (2019) "'Because we don't want to run in smog': Problems with the sustainable management of sport event tourism in protected areas (A case study of national parks in Poland and Slovakia)," *Sustainability (Switzerland)*, 11(2). Available at: <https://doi.org/10.3390/SU11020325>.
- Maldonado-Oré, E.M. and Custodio, M. (2020) "Visitor environmental impact on protected natural areas: An evaluation of the Huaytapallana Regional Conservation Area in Peru," *Journal of Outdoor Recreation and Tourism*, 31, p. 100298. Available at: <https://doi.org/10.1016/J.JORT.2020.100298>.
- Martín Martín, J.M. et al. (2019) "An analysis of the tourist mobility in the island of Lanzarote: Car rental versus more sustainable transportation alternatives," *Sustainability (Switzerland)*, 11(3). Available at: <https://doi.org/10.3390/SU11030739>.
- McGinlay, J. et al. (2023) "Perceived Social Impacts of Protected Areas, Their Influence on Local Public Support and Their Distribution across Social Groups: Evidence from the Eifel National Park, Germany, during the COVID-19 Pandemic," *Sustainability (Switzerland)*, 15(14). Available at: <https://doi.org/10.3390/SU151410848/S1>.
- PROHVILLA (2022). *Conversatorio: El turismo de calidad como eje económico para la conservación y educación en Pantanos de Villa*. [Facebook] 15 September. Available at: <https://www.facebook.com/pantanosdevillaoficial/videos/454068853418265> (Accessed: February 11, 2024).
- Schmudde, R. (2015) "Equestrian Tourism in National Parks and Protected Areas in Iceland – An Analysis of the Environmental and Social Impacts," *Scandinavian Journal of Hospitality and Tourism*, 15(1–2), pp. 91–104. Available at: <https://doi.org/10.1080/15022250.2014.1000713>.
- Serrano Pazos, D.F.N. (2020) *Recuperación y habilitación de la zona de amortiguamiento de los Pantanos de Villa y diseño de un centro de educación ambiental*. BA. Universidad San Ignacio de Loyola. Available at: <https://hdl.handle.net/20.500.14005/9925>.
- SERNANP (2016) *Plan Maestro del Refugio de Vida Silvestre Los Pantanos de Villa 2016 - 2020*. Available at: https://rsis.ramsar.org/RISapp/files/28593755/documents/PE884_mgt230516.EDIT.pdf (Accessed: February 18, 2024).
- Solano, P. (2020) *¿Qué es un Parque Nacional? El ABC de las áreas naturales protegidas en el Perú*. Edited by Walter H. Wust Ediciones SAC. Wildlife Conservation Society, Peru.
- Spenceley, A., Snyman, S. and Rylance, A. (2019) "Revenue sharing from tourism in terrestrial African protected areas," *Journal of Sustainable Tourism*, 27(6), pp. 720–734. Available at: <https://doi.org/10.1080/09669582.2017.1401632>.
- Stylidis, D. et al. (2024) "Resident rebellion: The interplay of fear, responsibility, animosity, and norms in shaping residents' opposition towards tourism," *Journal of Hospitality and Tourism Management*, 58, pp. 445–455. Available at: <https://doi.org/10.1016/J.JHTM.2024.03.004>.
- Thapa, B. (2013) "Visitor Segments and Attitudes Toward Sustainable Tourism in Protected Areas: A Case Study in Zambia Brijesh Thapa," *Journal of Park and Recreation Administration*, 31(2), pp. 50–60.
- UICN (2003) *Áreas protegidas en Latinoamérica, de Caracas a Durban : un vistazo sobre su estado 1992-2003 y tendencias futuras* | IUCN. Available at: <https://iucn.org/fr/node/11031> (Accessed: February 10, 2024).
- Wei, F. et al. (2020) "Representation of biodiversity and ecosystem services in East Africa's protected area network," *Ambio*, 49(1), pp. 245–257. Available at: <https://doi.org/10.1007/S13280-019-01155-4/FIGURES/5>.

Dynamic Pricing and Seasonality: Insights From Short-Term Rental Market

Patricio Torres-Luque¹, Esnil Guevara², Pablo Torres-Luque³ and Frida Carpio-Clemente⁴

¹Faculty of Business and Technology, Universidad UNIACC, Santiago, Chile

²Faculty of Economics and Business, Universidad Finis Terrae, Santiago, Chile

³Faculty of Legal and Social Sciences, Universidad UNIACC, Santiago, Chile

⁴Faculty of law, Universidad Autónoma de Guerrero, Chilpancingo, México

patricio.torres@uniacc.cl

eguevara@uft.cl

pablo.torres@uniacc.edu

11136080@uagro.mx

Abstract: This study aims to quantify the price elasticity of short-term rentals (STRs) across various districts and accommodation types in Santiago, Chile, analyze the relationship between accommodation capacity and occupancy rates, assess the impact of price changes on occupancy, and develop effective, data-driven pricing strategies. Data were collected via web scraping from Airbnb listings between October 21 and October 31, 2024, covering three key seasonal periods in 2025: January (peak summer), May (low autumn), and July (peak winter). The variables analyzed included nightly rates, bed capacity, accommodation types (houses, apartments, hotels, and guesthouses), and estimated occupancy rates. Findings reveal that price elasticity varies significantly between districts and accommodation types, with some areas exhibiting high sensitivity to price changes, particularly during peak seasons. For instance, districts like Las Condes and Downtown Santiago showed greater responsiveness to price adjustments, while Providencia and Vitacura demonstrated more stable demand regardless of pricing fluctuations. Accommodation types also played a critical role; apartments and guesthouses were more price-sensitive compared to houses and hotels. The Random Forest model highlighted the importance of digital reputation metrics, such as the number of reviews and average ratings, in influencing occupancy rates. Properties with higher ratings and more reviews consistently maintained higher occupancy, underscoring the significance of a positive online presence. Seasonal analysis showed occupancy rates peaking in January and July, aligning with summer and winter tourist influxes, respectively. Conversely, May experienced a noticeable dip in occupancy, reflecting the impact of seasonality on STR performance. The findings validate five hypotheses, confirming the pivotal roles of price elasticity, digital reputation, and tailored pricing strategies in optimizing STR performance. Based on these insights, the study proposes implementing flexible pricing models that adjust rates in real time according to demand fluctuations, particularly in price-sensitive districts. Furthermore, it recommends encouraging hosts to enhance their digital reputation by actively seeking positive reviews and maintaining high ratings. Finally, the study suggests introducing targeted promotions during low-demand seasons, such as offering discounted rates or value-added services, to attract guests and ensure steady occupancy across all periods.

Keywords: Price elasticity, Short-Term rentals (STRs), Dynamic pricing, Seasonality, Digital reputation, Occupancy rates

1. Introduction

The sharing economy has emerged as a transformative model in the socioeconomic landscape, revolutionizing sectors such as mobility, commerce, and especially tourism. In this context, platforms like Airbnb have redefined the short-term rental (STR) market by providing consumers with more flexible and personalized options compared to traditional models. This disruption has expanded opportunities for travelers while also posing significant challenges in terms of regulation, sustainability, and socioeconomic balance (Ertz & Leblanc-Proulx, 2019; Guttentag, 2015).

Against this backdrop, Santiago, the capital of Chile, serves as an ideal case study due to its communal diversity and marked seasonal dynamics. Districts such as Providencia, Las Condes, Vitacura, and Santiago Centro are key tourism and economic hubs where STRs significantly impact occupancy rates, pricing, and the real estate market. These areas attract both domestic and international tourists during the peak summer season (January) and winter season (July), while also experiencing fluctuations during the low season (May). This highlights the need for dynamic pricing strategies to address such variations.

Price elasticity emerges as a key concept for understanding these fluctuations. This indicator measures how changes in pricing influence STR occupancy, providing valuable insights for hosts and platforms to design effective revenue strategies. However, elasticity is not homogeneous: factors such as location, bed capacity, and accommodation type (e.g., houses, apartments) shape how consumers respond to price variations

(Guizzardi et al., 2021; Farronato & Fradkin, 2018; Petricek, Chalupa, & Chadt, 2020). Furthermore, seasonality and user preferences add another layer of complexity to the analysis.

This article aims to explore the relationship between price elasticity, occupancy, and the characteristics of STRs in Santiago's tourist districts, with the ultimate goal of contributing to the design of optimized pricing strategies to maximize revenue and enhance the sustainability of this business model. The research questions guiding this study are: How does price elasticity in STRs vary by district and accommodation type during peak and low seasons? What is the relationship between bed capacity and occupancy rates in STRs, considering seasonal differences? How do price variations between peak and low seasons affect average occupancy rates by district? What differentiated pricing strategies can be designed based on elasticity and the specific characteristics of STRs in Santiago? To answer these questions, the specific objectives of this study were: to quantify price elasticity in STRs by district and accommodation type during peak and low seasons; to determine the relationship between bed capacity and occupancy in STRs, considering seasonal differences; to analyze how price variations between seasons impact average occupancy rates by district; and, finally, to propose differentiated pricing strategies based on elasticity and the specific characteristics of STRs.

This study advances research on short-term rentals (STRs) by exploring the underexamined interplay of price elasticity, seasonality, and digital reputation in specific markets. While prior studies address these factors individually, few analyze their combined impact on occupancy and pricing in urban hubs like Santiago. By examining a dual-season destination with distinct district dynamics, this work extends theoretical frameworks and offers practical insights for stakeholders.

2. Theoretical Framework

2.1 The Collaborative Economy and Consumption Patterns

The sharing economy has emerged as a socioeconomic model that redefines traditional forms of consumption and production. This model is grounded in peer-to-peer interactions, primarily facilitated by digital platforms that enable the exchange of goods and services through rentals, sales, purchases, or donations. Its capacity to redistribute resources and promote technological innovation positions it as a catalyst for transforming contemporary socioeconomic systems (Oliveira, Bauer & Tomelin, 2018; Ertz et al., 2019).

Digital platforms have further strengthened inclusive access to resources and encouraged sustainable practices by reducing the demand for new goods and minimizing environmental impact, thereby contributing to sustainable development (Tu et al., 2024). In the tourism sector, this transformation is evident in consumers' preference for local and authentic experiences, facilitated by platforms like Airbnb. While this phenomenon promotes more accessible tourism, it also challenges local economies by reshaping relationships between producers and consumers and intensifying tensions related to social and regulatory equity (Ertz & Leblanc-Proulx, 2019; Guttentag, 2015).

Price elasticity in hotel demand is critical for understanding the dynamics of the tourism market, particularly in established destinations (Vives, Jacob, & Aguiló, 2019; Chen, 2021; Benítez Aurióles, 2020). In the case of Airbnb, elasticity depends on factors such as location, type of accommodation, and seasonality, which are key considerations for tourists when selecting lodging (Viglia, Mauri, & Carricano, 2016; Guizzardi et al., 2021; Farronato & Fradkin, 2018; Petricek, Chalupa, & Chadt, 2020). Rental platforms have adopted dynamic strategies to address these variables, including seasonal taxes to mitigate seasonality (Dalir, Mahamadinov, & Olya, 2021), real-time price adjustments based on demand, price segmentation, and uniform rate policies (Ampountolas, Shaw, & James, 2021). Notable practices include increased rates in high-tourism areas (Mohammed, Guillet, & Law, 2019) and reduced prices during low seasons with increases during peak periods (Leoni, 2020).

The flexibility of bed capacity in tourist accommodations, facilitated by platforms like Airbnb, enables rapid adaptation to demand, impacting occupancy rates and competitive strategies. Studies show that higher capacities influence both occupancy and accommodation performance (Zervas et al., 2017; Guttentag, 2015; Ikkala & Lampinen, 2015; Dogru et al., 2020; Edelman & Geradin, 2015). At the same time, seasonality significantly affects occupancy rates. During peak seasons, capacity is fully utilized, while in low seasons, it declines considerably. This challenge has driven strategies such as market diversification and promotional efforts to stabilize revenue streams. Research highlights how seasonality impacts the profitability and planning of accommodations managed through platforms like Airbnb (Canina et al., 2005; Song et al., 2012; Yang & Wong, 2012; Gutiérrez et al., 2017; Farronato & Fradkin, 2018).

2.2 Airbnb's Economic and Social Impact: Navigating Regulatory Complexities

Airbnb has democratized accommodation, boosting tourism and local economies, but it has also contributed to rising housing costs and urban gentrification (Zervas, Proserpio & Byers, 2017; Barron, Kung & Proserpio, 2021). Short-term rental (STR) listings are concentrated around tourist attractions, intensifying housing market pressures and reshaping socio-spatial structures in cities (Deboosere et al., 2019; García-López et al., 2020). The proliferation of STRs has heightened tensions between tourists and residents, prompting regulations aimed at balancing tourism growth with sustainability (Nieuwland & van Melik, 2020).

While Airbnb promotes collaborative tourism, its growth has exacerbated gentrification and reduced access to affordable housing. Many hosts lack the resources to adopt sustainable practices (Sung et al., 2020; Guttentag, 2019). Stricter platform policies are recommended to encourage responsible practices, including promoting sustainable lodging, educating hosts and guests on environmental impacts, and collaborating with local communities to mitigate the adverse effects of mass tourism (Karlsson & Dolnicar, 2016; Mody et al., 2017).

Globally, regulatory responses to Airbnb vary significantly. Cities like Barcelona have implemented zoning restrictions and enforced limits on STRs to mitigate their socioeconomic impacts (García-López et al., 2020). The absence of uniform regulations has allowed the growth of informal listings, complicating local authorities' oversight. Strategies such as zoning policies, stay duration limits, and specific taxes have been introduced to minimize the negative effects of STRs on local communities (Nieuwland & van Melik, 2020; García-López et al., 2020).

In Chile, regulatory proposals aim to ensure fair competition while promoting sustainability and equity in the tourism sector (Fiscalía Nacional Económica, 2024). Addressing these imbalances requires targeted strategies to distribute tourism benefits more equitably (Wachsmuth & Weisler, 2018; Adamiak, 2020).

2.3 Hypotheses

Hypothesis 1: Price elasticity of demand for STRs varies significantly between districts during peak and low seasons. (Vives, Jacob, and Aguiló, 2019; Chen, 2021).

Hypothesis 2: Accommodation type moderates the relationship between pricing and occupancy rates in STRs across different seasons (Viglia, Mauri, and Carricano, 2016; Guizzardi et al., 2021).

Hypothesis 3: There is a positive correlation between bed capacity and occupancy rates in STRs, influenced by seasonal differences.

Studies have found that larger accommodations often experience higher occupancy rates, as they can cater to groups and families, especially during peak travel seasons (Zervas et al., 2017; Guttentag, 2015).

Hypothesis 4: Seasonal price variations significantly affect average occupancy rates across different districts. (Dalir, Mahamadinov, and Olya, 2021).

Hypothesis 5: Pricing strategies tailored to district-specific elasticity and STR characteristics lead to optimized occupancy rates and revenue. (Ampountolas, Shaw, and James, 2021). Tailored pricing approaches that align with district-specific factors can therefore optimize outcomes in the STR market.

3. Methodology

This study employs a quantitative and descriptive-analytical approach, utilizing data extracted via web scraping from Airbnb. The data, collected between October 21 and October 31, 2024, covers three critical seasonal periods in 2025: January (peak summer season), May (low autumn season), and July (peak winter season). The analysis focuses on four key districts in Santiago, Chile—Providencia, Las Condes, Vitacura, and Downtown Santiago—selected for their economic and tourism relevance. Key variables include nightly rates (published accommodation prices), capacity (number of beds available per property), accommodation type (houses, apartments, hotels, and guesthouses), and the estimated occupancy rate, calculated as the ratio of booked days to available days.

Price elasticity was analyzed by measuring the percentage change in occupancy relative to the percentage change in prices, applying the following formulas:

- Price Variation: $[(\text{Average Price (High Season)} - \text{Average Price (Low Season)}) / \text{Average Price (Low Season)}] \times 100$

- Occupancy Variation: $[(\text{Average Occupancy (High Season)} - \text{Average Occupancy (Low Season)}) / \text{Average Occupancy (Low Season)}] \times 100$
- Elasticity: $\text{Occupancy Variation} / \text{Price Variation}$

The elasticity measures explored seasonal variations (Objective 1), while a Random Forest model assessed the relationship between bed capacity and occupancy (Objective 2). Cross-validation (K=5) evaluated the importance of variables such as reviews, ratings, capacity, and accommodation type. For Objective 3, the impacts of price variation on occupancy were analyzed across districts to identify patterns of price sensitivity. Finally, Objective 4 proposed tailored pricing strategies, emphasizing competitive adjustments for highly elastic zones and premium services for stable districts.

Python tools, including Scikit-learn, Matplotlib, Seaborn, and pandas, were used to support data analysis and visualization, with results detailed in comparative tables. Limitations of the study include the omission of last-minute bookings and external influences such as local events or pandemic restrictions, as well as potential underrepresentation of daily fluctuations in occupancy estimates.

4. Results

4.1 Price Elasticity in STRs

The analysis of price elasticity by district and accommodation type (table 1) revealed that houses in Las Condes (12.80) and Downtown Santiago (2.65) exhibited high elasticity, whereas Providencia (-0.08) and Vitacura (-2.71) showed negative elasticity. Apartments also displayed negative elasticities in several districts, with Providencia (-3.91) being particularly sensitive. In contrast, hotels in Downtown Santiago (7.07) demonstrated elastic demand, reflecting unique market behavior, as shown in Table 1. These findings confirm Hypotheses 1 and 2.

Table 1: Average prices by type of accommodation and district (own elaboration)

Type of Accommodation	Las Condes District	Providencia Distric	Santiago District	Vitacura District
Houses	12,80	-0,08	2,65	-2,71
Apartments	-0,49	-3,91	0,56	0,81
Hotels	-0,75	-6,07	7,07	-1,72
Guest house	0,97	6,95	0,46	-

4.2 Relationship Between Bed Capacity and Occupancy Rate

The Random Forest model, trained using cross-validation (K=5 folds), identified the most relevant variables for predicting the monthly occupancy rate. Across the analyzed seasons, the variables Number_of_Reviews and Average_Rating consistently emerged as the most influential factors in all three months, with particular significance in July, the peak winter season, when group reservations are typically made well in advance. The table below presents the top five predictor variables and their average importance within the model.

Table 2: Average importance of predictive variables for occupancy rates in January, May, and July 2025(own elaboration)

Variable	Average Importance (January 2025)	Average Importance (May 2025)	Average Importance (May 2025)
Number_of_Reviews	325,17	697,45	1,045,436
Average_Rating	283,96	556,45	833,20
Minimum_days	162,98	285,83	417,48
Number_of_guests	91,62	244,35	364,63
Beds	83,16	186,58	278,86

In July, bed capacity also gained importance, reflecting the preference of large groups seeking to ski and stay in districts close to ski resorts, such as Vitacura and Las Condes. The findings partially confirm Hypothesis 3, as bed capacity is significant, especially in July, but it is not the most critical predictor across all seasons.

4.3 Average Occupancy Rate by District

Seasonal variations in the average occupancy rate were observed in the analyzed districts, as detailed below:

Table 3: Average occupancy rates by district across January, May, and July 2025 (own elaboration)

District	Average occupancy rate January	Average occupancy rate May	Average occupancy rate July
Las Condes	13,70	23,20	29,70
Providencia	13,50	16,80	22,70
Santiago downtown	10,40	17,20	22,10
Vitacura	16,60	20,10	26,30

The average occupancy rates clearly reflect seasonality, with the lowest values observed in January, intermediate levels in May, and peaks in July. Vitacura district consistently recorded the highest occupancy rates across all seasons, indicating a stronger attraction for tourists in this district. Downtown Santiago and Providencia district showed intermediate occupancy levels, while Las Condes and Vitacura district reached their highest rates in July, with 29.7% and 26.3%, respectively (table 3).

4.4 Analysis of Price and Occupancy Variations Between Peak and Low Seasons

Price and average occupancy variations were calculated between peak seasons (January and July 2025) and the low season (May 2025) for each district. The results are summarized as follows:

Table 4: Average price (USD), occupancy rates, and variations by district across high and low seasons (own elaboration)

Comuna	average price in USD ¹		average occupation		Variation	
	High	Low	High	Low	Price	Occupation
Las Condes	89.39	88.21	21,66	23,24	1,34	-6,81
Providencia	77.21	77.03	18,08	16,80	-0,25	7,61
Downtown Santiago	48.62	44.83	16,25	17,18	-7,78	-5,41
Vitacura	182.68	153.39	21,44	20,14	19,11	6,44

In the Vitacura district, prices increased during the peak season (+19.11%) alongside occupancy (+6.44%), reflecting stability in the premium segment and strong demand from winter-season tourists. The Santiago Downtown district experienced a price reduction (-7.78%) but failed to increase occupancy (-5.41%), possibly due to lower competitiveness in winter activities. In the Providencia district, prices remained stable (-0.25%) while occupancy rose (+7.61%), demonstrating market resilience driven by cultural tourism and shopping opportunities. These findings confirm Hypothesis 4.

Figure 1 illustrates the geographic distribution of rates and accommodation types within the selected districts. This map complements the tabulated information by visually demonstrating how rates vary spatially based on accommodation type. Districts closer to the Andes Mountains, such as Vitacura and Las Condes, exhibit a higher proportion of premium accommodations, while Santiago Downtown and Providencia offer a more diverse range of options.

¹ Rates are converted to USD using the exchange rate of 1 USD = 971.07 CLP as of December 8th, 2024.

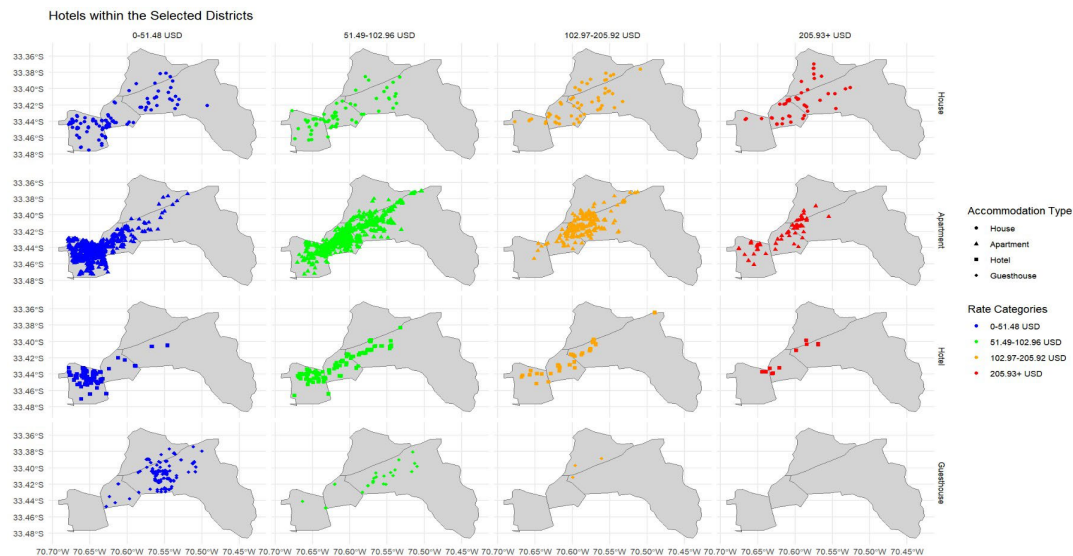


Figure 1: Geographic distribution of accommodation types and rate categories in the selected districts (Own elaboration)

4.5 Differentiated Pricing Strategies

The development of differentiated pricing strategies relies on insights derived from findings on price elasticity, seasonality, and digital reputation, integrated with spatial analyses of rates and occupancy across districts. These strategies are designed to optimize revenue and occupancy by tailoring approaches to the distinct characteristics of each district and season, addressing both high price sensitivity in certain areas and the stability of premium markets.

- Districts with high elasticity, such as Las Condes and Downtown Santiago, should adopt dynamic discounting during low seasons and promote long-stay packages to boost occupancy. Conversely, districts with low elasticity, including Providencia and Vitacura, should sustain premium pricing while emphasizing value-added services to justify higher rates.
- Encouraging hosts to enhance their digital reputation via loyalty programs or platform-based incentives can further increase occupancy, particularly during periods of high demand.
- Seasonal adjustments are crucial: high-capacity accommodations in premium districts like Vitacura can leverage the peak winter season (July) to raise tariffs, catering to increased demand from tourists engaging in snow-related activities at nearby ski resorts. Meanwhile, in Santiago, revising minimum-stay requirements during the low season (May) could attract a broader range of bookings by offering flexible, traveler-oriented packages.

These customized strategies reflect the diverse market dynamics of each district, effectively balancing price sensitivity with the unique characteristics of premium and urban tourism hubs, ultimately fostering both economic and operational sustainability. The findings confirm Hypothesis 5.

5. Findings and Discussion

The elasticity analysis strongly validates Hypothesis 1, demonstrating that districts such as Las Condes and Downtown Santiago exhibit high sensitivity to price changes. This underscores their potential for dynamic pricing strategies, particularly in segments such as houses and hotels. On the other hand, districts like Vitacura and Providencia, which exhibited lower price sensitivity, align with Hypothesis 4, confirming that seasonal price variations significantly impact occupancy rates across districts (Vives, Jacob, & Aguiló, 2019; Chen, 2021). These findings not only support existing theories on the heterogeneity of short-term rental (STR) markets in urban settings (Zervas et al., 2017; Guttentag, 2015), but also emphasize the critical role of tailoring pricing strategies to geographic and market-specific characteristics. Notably, the variation in elasticity highlights proximity to key attractions, such as ski resorts in Vitacura and Las Condes or cultural hubs in Providencia and Downtown Santiago, as pivotal factors influencing occupancy and pricing behaviors.

The analysis of predictor variables further corroborates Hypothesis 3, emphasizing the critical role of digital reputation—measured through the number of reviews and average ratings—in influencing occupancy rates.

These findings align with prior studies that highlight trust as a cornerstone of the sharing economy (Ertz & Boily, 2019; Guttentag, 2019). During the peak winter season, tourists seeking snow-related activities prioritize accommodations with strong digital reputations, particularly in districts close to the Andes Mountains, such as Vitacura and Las Condes. This underscores the importance of investing in online reputation management to maximize occupancy, particularly during high-demand periods.

Seasonal variations in prices and occupancy rates also highlight distinct territorial dynamics. For instance, Vitacura, a premium market, demonstrated remarkable stability during the peak winter season, reflecting its strong association with snow-related tourism activities. This aligns with Hypothesis 5, which posits that pricing strategies tailored to district-specific elasticity can optimize revenue and occupancy (Ampountolas, Shaw, & James, 2021). Conversely, in Downtown Santiago, price reductions failed to drive higher occupancy, indicating structural limitations in the district's competitiveness compared to more appealing winter destinations. These limitations may relate to insufficient alignment with winter tourism trends or a lack of differentiated offerings to compete with premium markets.

During the peak summer season (January), districts like Providencia and Downtown Santiago attracted higher demand due to their appeal for cultural tourism, offering urban and historical experiences (Gutiérrez et al., 2017; Farronato & Fradkin, 2018). This seasonal demand shift underscores the importance of differentiated pricing strategies that leverage each district's unique characteristics. For instance, cultural hubs like Providencia can benefit from competitive pricing models and targeted marketing campaigns to attract a broader audience, while premium districts like Vitacura may sustain higher pricing by emphasizing value-added services.

Overall, the findings illustrate that tailoring pricing strategies to address district-specific dynamics—such as elasticity, seasonal demand, and proximity to key attractions—can significantly enhance STR performance. These results also reinforce the interplay between digital reputation, territorial dynamics, and pricing strategies in maximizing occupancy and revenue across diverse market segments.

6. Conclusions

This study highlights the interplay between price elasticity, digital reputation, and seasonal dynamics in shaping occupancy rates for short-term rentals (STRs). The findings demonstrate that districts such as Las Condes and Downtown Santiago exhibit high sensitivity to price changes, while Providencia and Vitacura show more stable market behaviors, reflecting distinct territorial and economic dynamics (Vives, Jacob, & Aguiló, 2019; Chen, 2021). Seasonal price variations further emphasize the critical impact of demand fluctuations across Santiago's districts, underlining the need for tailored strategies to address these variations effectively (Dalir, Mahamadinov, & Olya, 2021).

Digital reputation emerges as a key factor influencing occupancy rates, particularly in high-demand districts like Vitacura and Las Condes during the winter season. Tourists are more likely to prioritize accommodations with strong online reputations, reinforcing the importance of maintaining a positive digital presence as a driver of both occupancy and revenue (Zervas et al., 2017; Guttentag, 2015). Pricing strategies aligned with local demand and market characteristics can optimize revenue, particularly in premium markets and highly competitive areas (Ampountolas, Shaw, & James, 2021).

The seasonal dynamics of Santiago highlight the importance of targeted strategies for different peak seasons. During winter, districts near ski resorts, such as Vitacura and Las Condes, can focus on high-capacity accommodations and premium pricing to cater to group travelers and snow-related activities. In summer, Providencia and Downtown Santiago can leverage their urban and cultural appeal by adopting competitive pricing and marketing strategies to attract a broader audience (Farronato & Fradkin, 2018; Gutiérrez et al., 2017). These findings provide practical recommendations for STR operators and platforms to enhance pricing models, strengthen digital reputation, and adapt to seasonal variations.

Regulation is essential to ensure the sustainability and equity of the STR market. Formalizing operations through robust governmental frameworks would promote fair competition and compliance with legal standards. Without formalization, Airbnb entrepreneurs lack access to critical training and government subsidies that are vital for developing skills in digital marketing, branding, customer service, and tourism quality standards. These elements are indispensable for improving the country's tourism image and ensuring a balanced and sustainable market.

This research serves as a foundation for future comparative studies in markets with similar seasonal patterns, providing valuable insights into the dynamics of the sharing economy. Incorporating qualitative perspectives from hosts and tourists could further enhance understanding and contribute to the development of more effective STR strategies.

References

- Ampountolas, A., Shaw, G. and James, S. (2021) 'Examining the relationships between market indicators and hotel pricing approaches', *Tourism Economics*, 27(6), pp. 1121–1139. Available at: <https://doi.org/10.1177/1354816620925225> (Accessed: 8 December 2024).
- Barron, K., Kung, E. and Proserpio, D. (2021) 'The effect of home-sharing on house prices and rents: Evidence from Airbnb', *Marketing Science*, 40(1), pp. 23–47. Available at: <https://doi.org/10.1287/mksc.2020.1227> (Accessed: 20 November 2024).
- Benítez Aurioles, B. (2020) *Peer-to-peer market for tourist accommodation: Characterization and implications*. Doctoral thesis. Universidad de Málaga. Available at: <https://hdl.handle.net/10630/20842> (Accessed: 8 December 2024).
- Canina, L., Enz, C. A., and Harrison, J. S. (2005) 'Agglomeration effects and strategic orientations: Evidence from the US lodging industry', *Academy of Management Journal*, 48(4), pp. 565–581. Available at: <https://doi.org/10.5465/amj.2005.17843938> (Accessed: 8 December 2024).
- Chen, J.S. (2021) *Economics of tourism and hospitality: A micro approach*. 1st ed. Abingdon, Oxon: Routledge. Available at: <https://doi.org/10.4324/9781003023241> (Accessed: 8 December 2024).
- Dalir, S., Mahamadaminov, A. and Olya, H.G.T. (2021) 'Airbnb and taxation: Developing a seasonal tax system', *Tourism Economics*, 27(2), pp. 365–378. Available at: <https://doi.org/10.1177/1354816620904894> (Accessed: 8 December 2024).
- Deboosere, R., Kerrigan, D., Wachsmuth, D. and El-Geneidy, A. (2019) 'Location, location and professionalization: A multilevel hedonic analysis of Airbnb rental prices and revenue', *Regional Studies, Regional Science*, 6(1), pp. 143–156. Available at: <https://doi.org/10.1080/21681376.2019.1578250> (Accessed: 20 November 2024).
- Dogru, T., Mody, M., Suess, C., McGinley, S., and Line, N.D. (2020) 'The Airbnb paradox: Positive employment effects in the hospitality industry', *Tourism Management*, 77, 104001. Available at: <https://doi.org/10.1016/j.tourman.2019.104001> (Accessed: 8 December 2024).
- Ertz, M. and Boily, É. (2019) 'The rise of the digital economy: Thoughts on blockchain technology and cryptocurrencies for the collaborative economy', *International Journal of Innovation Studies*, 3(3), pp. 84–93. Available at: <https://doi.org/10.1016/j.ijis.2019.12.002> (Accessed: 20 November 2024).
- Edelman, Benjamin G. and Geradin, Damien, Efficiencies and Regulatory Shortcuts: How Should We Regulate Companies like Airbnb and Uber? (November 24, 2015). Stanford Technology Law Review 19 (2016): 293–328, Harvard Business School NOM Unit Working Paper No. 16-026, Available at SSRN: <https://ssrn.com/abstract=2658603> or <http://dx.doi.org/10.2139/ssrn.2658603>
- Farronato, C. and Fradkin, A. (2018) 'The welfare effects of peer entry in the accommodation market: The case of Airbnb', *NBER Working Paper Series*, No. 24361. Available at: https://www.nber.org/system/files/working_papers/w24361/w24361.pdf.
- Fiscalía Nacional Económica (FNE) (2024) *Informe final: Estudio de mercado sobre el sector turístico en Chile*. Available at: https://www.fne.gob.cl/wp-content/uploads/2024/04/03.Informe_Final.pdf (Accessed: 8 December 2024).
- García-López, M.-Á., Jofre-Monseny, J., Martínez Mazza, R. and Segú, M. (2020) 'Do short-term rental platforms affect housing markets? Evidence from Airbnb in Barcelona', *Journal of Urban Economics*, 119, pp. 103278. Available at: <https://doi.org/10.1016/j.jue.2020.103278> (Accessed: 20 November 2024).
- Guizzardi, A., Pons, F.M.E., Angelini, G. and Ranieri, E. (2021) 'Big data from dynamic pricing: A smart approach to tourism demand forecasting', *International Journal of Forecasting*, 37(3), pp. 1049–1060. Available at: <https://doi.org/10.1016/j.ijforecast.2020.11.006> (Accessed: 8 December 2024).
- Gutiérrez, J., García-Palomares, J.C., Romanillos, G. and Salas-Olmedo, M.H. (2017) 'The eruption of Airbnb in tourist cities: Comparing spatial patterns of hotels and peer-to-peer accommodations in Barcelona', *Tourism Management*, 62, pp. 278–291. Available at: <https://doi.org/10.1016/j.tourman.2017.05.003> (Accessed: 8 December 2024).
- Guttentag, D. (2015) 'Airbnb: Disruptive innovation and the rise of an informal tourism accommodation sector', *Current Issues in Tourism*, 18(12), pp. 1192–1217. Available at: <https://doi.org/10.1080/13683500.2013.827159> (Accessed: 20 November 2024).
- Guttentag, D. (2019) 'Progress on Airbnb: A literature review', *Journal of Hospitality and Tourism Technology*, 10(4), pp. 814–844. Available at: <https://doi.org/10.1108/JHTT-08-2018-0075> (Accessed: 20 November 2024).
- Ikkala, T. and Lampinen, A. (2015) 'Monetizing network hospitality: Hospitality and sociability in the context of Airbnb', *Proceedings of the 18th ACM Conference on Computer Supported Cooperative Work & Social Computing*. Available at: <https://doi.org/10.1145/2675133.2675274> (Accessed: 8 December 2024).
- Karlsson, L. and Dolnicar, S. (2016) 'Someone's been sleeping in my bed', *Annals of Tourism Research*, 58, pp. 159–162. Available at: <https://doi.org/10.1016/j.annals.2016.02.006> (Accessed: 20 November 2024).
- Leoni, V. and Nilsson, J.O.W. (2020) 'Dynamic pricing and revenues of Airbnb listings: Estimating heterogeneous causal effects', *DEA Working Papers*, No. 92, Universitat de les Illes Balears. Available at: <https://econpapers.repec.org/paper/ubideawps/92.htm> (Accessed: 8 December 2024).

- Mody, M., Suess, C. and Lehto, X. (2017) 'The accommodation experiencescape: A comparative assessment of hotels and Airbnb', *International Journal of Contemporary Hospitality Management*, 29(9), pp. 2377–2404. Available at: <https://doi.org/10.1108/IJCHM-09-2016-0501> (Accessed: 20 November 2024).
- Mohammed, I., Guillet, B.D. and Law, R. (2019) 'Modeling dynamic price dispersion of hotel rooms in a spatially agglomerated tourism city for weekend and midweek stays', *Tourism Economics*, 25(8), pp. 1245–1264. Available at: <https://doi.org/10.1177/1354816619826829> (Accessed: 8 December 2024).
- Nieuwland, S. and van Melik, R. (2020) 'Regulating Airbnb: How cities deal with perceived negative externalities of short-term rentals', *Current Issues in Tourism*, 23(7), pp. 811–825. Available at: <https://doi.org/10.1080/13683500.2018.1504899> (Accessed: 20 November 2024).
- Oliveira, B.S., Bauer, J.E. and Tomelin, C.A. (2018) 'Economía colaborativa: un estudio sobre Airbnb', *Revista Rosa dos Ventos*, 10(2), pp. 300–315. Available at: <https://www.redalyc.org/journal/1807/180762492005> (Accessed: 20 November 2024).
- Petricek, M., Chalupa, S. and Chadt, K. (2020) 'Identification of consumer behavior based on price elasticity: A case study of the Prague market of accommodation services', *Sustainability*, 12(22), p. 9452. Available at: <https://doi.org/10.3390/su12229452> (Accessed: 8 December 2024).
- Song, H., Li, G. and Witt, S.F. (2012) 'Tourism demand modelling and forecasting: A review of recent research', *Tourism Management*, 29(2), pp. 203–220. Available at: <https://doi.org/10.1016/j.tourman.2007.07.016> (Accessed: 8 December 2024).
- Sung, E., Kim, H. and Lee, D. (2020) 'Why do people consume and provide sharing economy accommodation? A sustainability perspective', *Sustainability*, 12(5), p. 2076. Available at: <https://doi.org/10.3390/su12052076> (Accessed: 20 November 2024).
- Tu, Y.X., Kubatko, O., Melnyk, L., Li, R. and Kovalov, B. (2024) 'Economic, institutional and environmental drivers of SMEs' development in the EU: Sustainable development goals perspective', *Springer*. Available at: <https://doi.org/10.1007/s10668-024-05686-z> (Accessed: 8 December 2024).
- Viglia, G., Mauri, A. and Carricano, M. (2016) 'The exploration of hotel reference prices under dynamic pricing scenarios and different forms of competition', *International Journal of Hospitality Management*, 52, pp. 46–55. Available at: <https://doi.org/10.1016/j.ijhm.2015.09.010> (Accessed: 8 December 2024).
- Vives, A., Jacob, M. and Aguiló, E. (2019) 'Online hotel demand model and own-price elasticities: An empirical application in a mature resort destination', *Tourism Economics*, 25(5), pp. 670–694. Available at: <https://doi.org/10.1177/1354816618800643> (Accessed: 8 December 2024).
- Wachsmuth, D. and Weisler, A. (2018) 'Airbnb and the rent gap: Gentrification through the sharing economy', *Environment and Planning A: Economy and Space*, 50(6), pp. 1147–1170. Available at: <https://doi.org/10.1177/0308518X18778038> (Accessed: 20 November 2024).
- Yang, Y. and Wong, K.K.F. (2012) 'A spatial econometric approach to model the influence of travel time on hotel occupancy', *International Journal of Hospitality Management*, 31(3), pp. 686–694. Available at: <https://doi.org/10.1016/j.tourman.2012.04.004> (Accessed: 8 December 2024).
- Zervas, G., Proserpio, D. and Byers, J.W. (2017) 'The rise of the sharing economy: Estimating the impact of Airbnb on the hotel industry', *Journal of Marketing Research*, 54(5), pp. 687–705. Available at: <https://doi.org/10.1509/jmr.15.0204> (Accessed: 20 November 2024).

The Stakeholders of Voluntourism, Community-Based Tourism, and Regenerative Tourism: An Integrated Framework

Minna Tunkkari-Eskelinen and Rositsa Röntynen

Jamk University of Applied Sciences, Jyväskylä, Finland

minna.tunkkari-eskelinen@jamk.fi

rositsa.rontynen@jamk.fi

Abstract: Voluntourism, community-based tourism, and regenerative tourism represent three complementary approaches that collectively enhance tourism's responsibility. Each of them offers unique insights and methodologies that, when combined, can reinforce the others, promoting a more sustainable and ethical tourism landscape. To fully account for stakeholder responsibilities within this integrated framework, a comprehensive mapping of stakeholders is essential. This theoretical exploration conducts a literature review to synthesize core features of stakeholders across voluntourism, community-based tourism, and regenerative tourism, identifying both direct and indirect indications of their roles and functions. The analysis highlights key categories of stakeholders, including tourism demand, supply, intermediaries, the regulative system, and the natural and cultural environment. By comparing the characteristics and responsibilities of these stakeholders, the review reveals significant commonalities among the three tourism approaches, while also identifying potential areas for improvement. Furthermore, the inputs and outputs of stakeholders are integratively defined. Ultimately, the study aims to broaden the understanding of each approach and emphasize the importance of collaborative responsibility among stakeholders in fostering a more sustainable tourism ecosystem. The insights gained from this exploration contribute to the ongoing discourse on responsible tourism practices and offer practical implications for stakeholders seeking to enhance their roles in this evolving landscape.

Keywords: Voluntourism, Regenerative tourism, Community-based tourism, Stakeholder mapping, Responsible tourism

1. Introduction

For stakeholders to be accounted for their responsibility in tourism, the spectrum of stakeholders should first be mapped thoroughly. This study synthesizes some of the core features of stakeholders in voluntourism (VT), community-based tourism (CBT), and regenerative tourism (RT) from direct, but more often indirect indications of their roles and functions in scientific literature. Comparing the characteristics of the three concepts, there is much in common, but also much that could be loaned from each other to broaden the understanding about each tourism approach. The research question is: *Who are the stakeholders in voluntourism, community-based tourism, and regenerative tourism, and what similarities and differences could be identified between their roles and responsibilities to improve responsibility?*

This paper is a continuation of our previous research on voluntourism (Röntynen & Tunkkari-Eskelinen, 2022; Röntynen, 2022; Tunkkari-Eskelinen & Röntynen, 2023; Röntynen & Tunkkari-Eskelinen, 2024) as we noticed the need of expanding and concretizing the theoretical framework of voluntourism.

2. Research Methods

This theoretical exploration is based on an integrative literature review (Snyder, 2019) of the separate concepts of VT, CBT, and RT, enabling the development of a new theoretical framework (Torraco, 2005). A comprehensive search of scientific databases was conducted with an emphasis on more recent publications, but through a snowball effect more relevant papers were included. The literature review on each of the chosen tourism approaches is presented narratively, and inductive thematic analysis is used to identify, report, and analyse the patterns which organically emerge from the theory without predefined categories or themes.

The study applies the tourism destination ecosystem approach (Röntynen, 2024) to categorize stakeholders and particularly allow for the inclusion of the natural and cultural environment as stakeholders. Example, which the study refers to, states that "such a business ecosystem consists of not only intermediaries and industry partners, but also various stakeholders including governments, visitors, and the natural environment" (Selen & Ogulin, 2015, 167). The analysis also utilizes the input-output framework. Traditionally used in economic modeling (Thomassin, 2018), input-output analysis is adapted here as a qualitative framework to trace stakeholder interactions and emphasize responsibility in tourism.

3. The Stakeholders: Literature Review

3.1 Voluntourism

The most explored stakeholders of VT are the volunteer travellers, described both “as volunteers and tourists”, not fully matching the characteristics of either of these groups (Han, Lee & Hyun, 2020, 2). They make the decision to endeavour a volunteering trip by a combination of altruistic and selfish reasons (Han, Lee & Hyun, 2020; Mustonen, 2005; Wearing & McGehee, 2013). They wish to change their daily life environment and have meaningful and memorable experiences, learn something new and self-improve, interact with new cultures to better understand them, build new or restore natural environments, infrastructure, and social structures in the destination, as well as contribute to the local economy (Han, Lee & Hyun, 2020; Bentele, 2023; Hernandez-Maskivker, Lapointe & Aquino, 2018; Pompurová et al., 2018). The majority of voluntourists come from Europe and North America (Bentele, 2023), which positions their origin in the developed world. The imbalance between selfish and altruistic motivation of voluntourists is seen as a basis of commodification of locals’ challenges and decrease of benefits (Bentele, 2023; Wearing, Young & Everingham, 2017). Moreover, the lack of training and ephemerality of visits of volunteers affect the received benefits negatively (Anderson, Kim & Larios, 2017; Bentele, 2023; Hernandez-Maskivker, Lapointe & Aquino, 2018). Historically, voluntourism has been seen as international activity (Wearing & McGehee, 2013), but more recently domestic voluntourists are also accounted for (Pompurová, Sokolová & Cole, 2020).

In the context of VT, locals are oftentimes mentioned as a mere object of the volunteering activity – the community which needs support from outside (Hernandez-Maskivker, Lapointe & Aquino, 2018; Bentele, 2023; Han, Lee & Hyun, 2020) and are neglected as active and complex stakeholders (Bentele, 2023, 9). This could lead to neocolonialist attitudes, white saviorism, and establishment of unequal power relations between locals, tourists, and intermediaries (Wearing & McGehee, 2013; Bentele, 2023). Sometimes not only local needs but even members of the community, like children (e.g., van Doore & Nhep, 2023) and marginalized social groups (McGehee & Andereck, 2009), are commodified. A shift is observed from the traditional understanding that VT is practiced only in developing countries towards a more power-equalized and broader understanding that the community in developed countries could also offer opportunities for travellers to volunteer (Pompurová et al., 2018; Wearing & McGehee, 2013; Röntynen & Tunkkari-Eskelinen, 2022). Residents could be seen as an inseparable element of any type of contemporary tourism, being both a resource and a driver of tourism development (Richards & Hall, 2002), and aligning with tourists demands for cultural exchange, authenticity, and sustainability (Ribov, 2014; Bentele, 2023; Pompurová et al., 2018). It is difficult to account for the whole spectrum of stakeholders belonging to the local community with their versatile roles (Wearing & McGehee, 2013). Many locals function as hosts of volunteer trips, either as accommodators or also volunteer task providers, as this type of alternative tourism brings tourists closer to the daily life in the destination (Wearing, 2001). By that, residents promote their culture and share everyday struggles with travellers, maintain an open dialogue, and gain knowledge and new ideas from other cultures (Bentele, 2023). In other cases, however, locals are prevented from participating in VT activity due to socio-cultural, economic, or language barriers (Wearing & McGehee, 2013). The understanding of locals regarding VT may vary depending on the value of volunteering in the respective society, but in general locals perceive voluntourists differently than conventional tourists: sometimes too positively and uncritically (Bentele, 2023), other times as unwanted intruders (e.g., Hernandez-Maskivker, Lapointe & Aquino, 2018).

Although locals and tourists are brought together in VT for direct, personal interactions, Wearing implies the presence of more participants in this mix by defining VT as volunteering “in an organized way” (Wearing, 2001, 1). Intermediaries could be tour operators and non-governmental organizations (NGOs), based in the tourism generating locations or the destinations, curating the volunteering visit experiences (Bentele, 2023; Wearing & McGehee, 2013; Brown, 2005; Pompurová & Marčeková, 2017), but their roles in the destination are studied insufficiently (Hernandez-Maskivker, Lapointe & Aquino, 2018). Some authors point out that oftentimes NGOs organizing the voluntourism activity come from non-tourism-related industries and do not understand tourism (Wearing & McGehee, 2013; Röntynen & Tunkkari-Eskelinen, 2022). When the activity is well organized and managed, intermediaries are putting tourists in new situations and offering them to explore the unknown to enable their transformative experience (Bentele, 2023) while balancing with the benefits for the local community (Anderson, Kim & Larios, 2017) and ensuring the sustainability dimensions (Pompurová et al., 2018). On the downside, the presence of volunteer tourist organizations in the destination accustoms locals to receiving external help and benefit, shifting the responsibilities away from the community (Bentele, 2023; Anderson, Kim & Larios, 2017). The intermediary role is a powerful one, as it could influence attitudes and actions of tourists and locals alike, both positively and negatively (Bentele, 2023; Hernandez-Maskivker, Lapointe & Aquino, 2018). According to some authors, the commercially operating intermediaries are

predominantly concerned with profit than the needs of the local community (e.g., Wearing, Young & Everingham, 2017; Anderson, Kim & Larios, 2017). The recent technological developments allow bypassing the conventional intermediaries via digital platforms and social media (Wearing & McGehee, 2013), however this establishes a new type of intermediaries, setting their own rules, starting with crafting new terms for VT (Röntynen & Tunkkari-Eskelinen, 2022).

Cocreating the VT product between tourists, locals, and intermediary organizations fits the contemporary understanding of tourism (Hernandez-Maskivker, Lapointe & Aquino, 2018), but even more stakeholders could be found. In addition to the consumer, service provider, and intermediary role in voluntourism, the nature environment and the local culture are often discussed in research. Some of the environmental activities practices on a volunteering trip are improving animal welfare, conserving the environment and recovering it post-disaster (Han, Lee & Hyun, 2020, 1). In most of the studies, they are presented as a contribution to the local community (e.g., Bentele, 2023; Wearing & McGehee, 2013) although, by a more biocentric approach (see Hall & Page, 2006, 325), nature would rather be seen as receiving the benefits (e.g., Pompurová et al., 2018, 2). VT allows for deeper interactions between visitors and nature, e.g., in a protected area, leading to transformative benefits for the tourist (Bentele, 2023). Another reason to separate nature from the community is pointed out by some authors: compared to economic and social benefits, VT currently accomplishes little environmental benefits (Hernandez-Maskivker, Lapointe & Aquino, 2018). While local culture is an attraction for voluntourists to enjoy on their trip (Han, Lee & Hyun, 2020), cultural exchange is emphasized as a main reason for practicing VT, especially in its newer modes which could be distinguished from the power-loaded pro-poor forms (Wearing & McGehee, 2013; Wearing, Young & Everingham 2017). The regulative system holds an important role in ensuring VT's ethicality and responsibility, e.g., labor regulations ensure that local jobs are not endangered by the presence of volunteers (Bentele, 2023), and child protection regulations preclude the trafficking and abuse of orphans (van Doore & Nhep, 2023).

3.2 Community-Based Tourism

As a bottom-up approach, CBT focuses on locals as a main stakeholder group, aiming to empower and prioritize them by offering an active role in tourism development and management (Blackstock, 2005; Mtapuri, Camilleri & Dłużewska, 2021; Ngo & Creutz, 2022). Oftentimes they represent poor or marginalized social groups, even indigenous peoples, in rural and remote locations (Giampiccoli & Mtapuri, 2012; Zielinski et al., 2020; Naranjo Lluart, 2022), which, however, does not imply application of the concept only in developing countries (Zielinski et al., 2020). They possess limited resources, competencies, and market connections, which establishes barriers to participation in tourism (Liang, 2022; Lee & Joo, 2023; Goodwin & Santilli, 2009). This necessitates external support of tourism development, which can lead to power relations (Giampiccoli & Mtapuri, 2012). Locals play roles in the tourism supply as employers, employees, and entrepreneurs (Blackstock, 2005). Moreover, tourism's success depends also upon residents' positive attitude towards tourists (Blackstock, 2005). Often in CBT, the community is perceived as a homogenous group instead of accounting for the contradicting values and power relations within it (Blackstock, 2005). Community could be defined by its locality or by the sense of identity (Giampiccoli & Mtapuri, 2012) and should be ultimately considered as a network (Zielinski et al., 2020). By CBT, residents can minimize economic leakages (Mtapuri, Camilleri & Dłużewska, 2021) and maximize tourism benefits (Ngo & Creutz, 2022), but tourism industry sometimes opposes their involvement in decision-making, fearing it would raise costs and lower profits which often limits public participation to a tokenistic formal approval for legitimacy (Blackstock, 2005). This opposes the conventional structures of tourism supply, such as large and medium-sized international mass tourism companies, to the small locally owned companies of CBT. It is not only important to have locally owned and run tourism businesses to minimize leakages, but local producers should be linked to tourism by procurements of tourism companies (Mtapuri, Camilleri & Dłużewska, 2021).

As an alternative form of tourism, CBT enables the interactions between locals and visitors where the latter receive immersive cultural experiences when involving in community-based activities (Mtapuri, Camilleri & Dłużewska, 2021). Moreover, it provides visitors with the opportunity to give back to the host community (Giampiccoli & Mtapuri, 2012, 37). Contemporary tourists demand authenticity, which could be provided by CBT (Zielinski et al., 2020). Most visitors are of urban and international origin, drawn by the allure of rural peacefulness and unknown cultures (Zielinski et al., 2020). Tourists act as cocreators of tourism through social interactions, and this role stems from their motivation to be satisfied as customers (Liang, 2022). Some of the main motivations to participate in CBT are learning and recreation (Liang, 2022).

CBT needs intermediaries for mobilization of locals because, due to the forementioned barriers, participation and empowerment do not emerge spontaneously (Lee & Joo, 2023). Intermediaries include local and international NGOs, sustainability-focused agencies, community associations and tourism organizations, and private companies, such as tour operators (Wolters, 2021; Liang, 2022; Giampiccoli & Mtapuri, 2012). Universities are also named as intermediaries of CBT (Liang, 2022, Lee & Joo, 2023). Agencies external to the community running community-based projects should have a facilitative role to foster local leadership or support the destination's access to markets, however sometimes they exploit the community for own benefit (Giampiccoli & Mtapuri, 2012); thus, the use of community's resources should be locally controlled (Dangi & Jamal, 2016). NGOs often bridge the community with government aid and facilitate its use (Lee & Joo, 2022). In addition to supporting the community, the intermediaries of CBT encourage visitors to engage with and learn from local culture, e.g. through hands-on activities, and thus maximize the benefits of their experience (Liang, 2022). Digital technology plays a special role in CBT, compensating for the lack of market connections of locals by enabling them to attract tourists directly, and allowing for new ways of digital empowerment (Keskinen et al., 2020; Asia-Pacific Economic Cooperation, 2022).

Nature environment and local culture are presented as resources owned and managed by the locals, and requiring the responsible action of tourism businesses and visitors, while the locals ensure their sustainable use (Mtapuri, Camilleri & Dłużewska, 2021; Ngo & Creutz, 2022). As local resources they hold greater value for the community than for other stakeholders (Liang, 2022; Chatkaewnapanon & Lee, 2022). Culture is related to visitors learning experiences, while nature contributes to their health (Naranjo Llupart, 2022). The emphasized self-reliance of the local community does not mean functioning in isolation but interacting with the surrounding stakeholders in a mutually beneficial way (Giampiccoli & Mtapuri, 2012). Governments could encourage tourism businesses in the community towards responsible practices by developing competencies, providing infrastructure, financial incentives and administrative support (Mtapuri, Camilleri & Dłużewska, 2021; Lee & Joo, 2023; Naranjo Llupart, 2022). But the regulative system is also seen as channeling the neocolonialist influences of globalization locally through policies (Giampiccoli & Mtapuri, 2012).

3.3 Regenerative Tourism

"All stakeholders in the tourism value chain, including travellers, businesses, employees and communities have a shared responsibility in preserving the local assets and enabling the destination as a whole to develop" (Heslinga, 2022, 6). RT principles align with the ecosystem approach emphasizing the understanding of the interrelations between all stakeholders and the subsequent impact for the entire complex system, necessitating partnerships with more than the conventional economic dimensions (Heslinga, 2022). Moreover, it indicates an interdependence between the social and economic systems with "all life on this planet" (Pollock, 2019, 5). Consequently, everyone and everything is a stakeholder in RT, engaging into transformations and regeneration of the self and the environment (Bellato, Frantzeskaki & Nygaard, 2022).

Most tourists do not realize their need for transformation, despite their loss of roots in the globalized and digitalized world, but they could be externally driven towards making positive impact on themselves and the surroundings (Hossain, 2023). In RT, visitors aim to leave the destination in better condition than it was before their arrival, taking an active role by which they also gain memorable and transformative experiences (Heslinga, 2022). They engage in regenerative action which could be manifested as volunteering, ideating and cocreating (Cave & Dredge, 2020). They gain new knowledge and skills, especially regarding regenerative techniques (Heslinga, 2022). Moreover, they play a cocreator role by conveying the regeneration message further and raising awareness (Heslinga, 2022). Their participation in tourism is quality instead of quantity-oriented, which opposes them to the conventional tourists causing climate change acceleration, overtourism, and other degradation, and being responsible in their unequal numbers for the maintenance of power relations with the hosts and residents (Pollock, 2019).

In RT, hosts represent the local community of the destination. Often, they belong to indigenous communities, as regeneration is rooted in indigenous and traditional knowledge and principles (Heslinga, 2022; Bellato, Frantzeskaki & Nygaard, 2022; Hossain, 2023). Pollock (2019) argues that communities consciously choosing how to represent their identity, interact with guests and becoming aware of the need for consolidating in order to create the holistic tourist experience will bring the change towards regeneration. The emphasis is on the potential of the community instead of on identifying its problems and applying solutions (Bellato, Frantzeskaki & Nygaard, 2022).

Among intermediaries, tour operators facilitate RT experiences, offering authentic community-based visits and community-benefitting hands-on activities (Heslinga, 2022). Destination management organizations (DMOs)

role is expanded from marketing and sales to asset management to foster the thriving of the destination (Pollock, 2019). International agencies providing development aid should prioritize local needs and improve long-term impact (Cave & Dredge, 2020). Digital technology plays an intermediate role, e.g., as a transmitter of the regenerative principles, an enabler of innovations (Heslinga, 2022) and a facilitator of the direct contact between tourists and locals (Cave & Dredge, 2020).

Nature is an object of the restorative activities (Heslinga, 2022) and the necessity is established by its role of a “life support system” (Pollock, 2019, 3). It is not separated from humans but complementing them (Hossain, 2023). Moreover, regeneration requires an expansion of perspective from considering only the shareholders and stakeholders towards including the community and the planet into an understanding of the world as a living system instead of a resource pot (Pollock, 2019). Culture is an asset, a source of collective intelligence (Pollock, 2019). It sets different contexts to different destinations, necessitating pluriversal approach to RT, which cannot be reduced from the complexity of the real world; it enables the combination of indigenous knowledge with western and modern science (Bellato, Frantzeskaki & Nygaard, 2022). RT does not manifest itself only as activity offerings, but sometimes also as regulations and restrictions to tourism, imposed by local authorities or tourism boards, to drive stakeholders towards regeneration (Heslinga, 2022). On the other hand, regulations might hinder regenerative tourism by not recognizing structures of the informal sector where regenerative practices are established in the community, especially in developing countries and indigenous societies; thus, the regulative system should incorporate alternative-capitalist and non-capitalist practices in addition to the capitalist ones to enable regenerative tourism (Cave & Dredge, 2020). To date, there are no regenerative certifications to designate the regenerative action (Heslinga, 2022).

4. Results

Table 1 summarizes the findings on different aspects of stakeholders’ characteristics, roles and responsibilities. In all three tourism types, the experience is cocreated, requiring sensible relationships between stakeholders. In all types, tourists are defined by their desire for meaningful and memorable experience, learning and recreation, self-transformation and, to a different extent, willingness to transform the destination for the better. To increase their responsibility, they should diversify, including tourists from developing countries and such with understanding of the rurality and indigeneity, and become more conscious of their role. The intermediaries, regardless of its type, should balance between its own interests, the requirements of tourists, and the local needs. Those coming from tourism background might not fully understand how to support the locals, while those of non-touristic origin might not be able to construct a holistic experience which motivates the travellers; thus, they should cooperate. CBT could particularly benefit from a combination or benchmarking of VT and RT, because it currently experiences deficiencies in the market links of the destination. Caution should be exercised regarding digital intermediaries which sometimes provide benefits, but other times could set new challenges and inequalities. Local community has multiple roles – approving or disproving tourism activity in its home, hosting tourism, initiating change, providing transformative benefits in the interaction with tourists, safeguarding important traditional knowledge. Many times, however, residents lack the resources, experience barriers to participation, or are simply marginalized in the global power play, although all three observed tourism types seemingly provide approaches emphasizing the locals’ importance. The regulative system, being it on a local, national, or international level, could both inhibit and promote responsible practices in tourism; thus, it should be strategically developed to serve at best. Nature and culture and specific, non-human stakeholders evident in all three tourism types, however, only the RT approach fully accounts for their active role in the ecosystem, while in VT and CBT, they could easily be overlooked as mere resources or objects.

Table 1: Comparison of the stakeholders of VT, CBT, and RT

Stakeholders	Voluntourism	Community-Based Tourism	Regenerative Tourism
<i>Tourism Demand</i>	international and domestic tourists mostly from the West; vacation and volunteering oriented	urban and international tourists, immersing into local culture for learning and recreation	conscious or externally motivated tourists; quality instead of quantity
<i>Intermediaries</i>	NGOs supplying volunteers to destinations (according to local needs), not always understanding tourism	intermediary organizations aiding local communities in finance and capacity acquisition	non-touristic organizations appropriating tourism products for regeneration of the community; should prioritize local needs
	tour operators selling volunteering trips	almost no role of tour operators for the weak links of the locals to the market	tour operators facilitate RT experiences
	digital platforms removing the need for other intermediaries, setting own rules	digital platforms compensating for the lack of market links and empowering locals in new ways	digital technology as an enabler of the contacts between visitors and locals and a transmitter of the regenerative message
<i>Tourism Supply</i>	local community as an object of voluntary activity and a source of transformation for tourists, versatile and heterogeneous, hosting VT when able to participate, not always approving of VT	local community as an owner, developer, and beneficiary of tourism; often from marginalized, indigenous, rural, remote origin, from developing and developed countries; heterogeneous and networked, representing tourism service providers, local producers, residents	local community as an object of regeneration, a source of knowledge about means of regeneration, a catalyzer of change; often indigenous
<i>Regulative system</i>	ensuring the ethicality (e.g., local jobs, children's rights)	governments as a source of funding, motivator of responsibility; policies not always accounting adequately for peripheral regions and communities, channelling neocolonialism	governing agencies externally motivating tourists into transformative travel, promoting regeneration by imposing regulations and restrictions, but hindering it by not recognizing the informal sector
<i>Nature</i>	nature as an object and beneficiary of volunteer activity and a motive to travel	nature as a motive to travel, source of health for tourists; a resource most significant for locals and owned by them	nature as a fundamental support system, complementing society; a source of collective intelligence and an object of regeneration
<i>Culture</i>	cultural exchange in and through voluntary activity; learning about new cultures as a motive to travel	learning about new cultures as a motive to travel, cultural heritage preservation as a goal; a resource most significant for locals	culture as an asset and a source of collective intelligence; an object of regeneration

To further concretize the research results, the study employs an input-output analysis to examine stakeholders in VT, CBT, and RT (Table 2). The input-output analysis identifies direct, indirect, and induced impacts on tourism responsibility. The table presents stakeholder inputs and outputs as they are conceptually intended within VT, CBT, and RT, without applying a critical lens to their current practices or assessing discrepancies between intended and actual responsibilities. This integrative approach assumes that VT, CBT, and RT function as parallel complementary models, learning from each other to address their respective shortcomings, ethical gaps, and conceptual ambiguities. By structuring stakeholder roles through an input-output perspective, the analysis highlights how responsibility is embedded in each stakeholder's contributions (inputs) and the resulting effects (outputs). The table systematically captures these interactions, emphasizing how direct contributions, such as financial expenditures, policy enforcement, or cultural stewardship, generate cascading effects that shape local economies, community empowerment, and long-term transformations. The results of the analysis not only reveal the interdependencies between stakeholders but also highlight the necessity of a responsibility-driven approach in tourism development. The findings support the understanding of how VT, CBT, and RT can reinforce one another, guiding stakeholders toward more ethical, responsible, and regenerative tourism practices.

Table 2: Integrative Input-Output Analysis of Stakeholder roles in VT, CBT, and RT

Stakeholder	Input	Output		
		Direct impact	Indirect impact	Induced impact
<i>Tourism demand (travellers)</i>	Financial expenditure, motivation, expectations, ethical choices in travel, respect for local culture, sustainability awareness	Economic benefit to local businesses, participation in cultural exchange, labor contribution (volunteering), responsible consumption and interaction	Local employment opportunities, demand for ethical tourism services, influence on cultural perceptions, empowerment of local entrepreneurs	Long-term influence on sustainability attitudes, transformation of travel habits towards more responsible tourism
<i>Intermediaries (e.g., NGOs, tour operators, digital platforms)</i>	Logistics, funding mechanisms, marketing, volunteer coordination, commitment to fair trade, ethical tourism promotion, inclusive business models	Organization of responsible travel experiences, market access for local providers, digital facilitation, transparency in operations, respect for local autonomy	Growth of sustainable tourism-related businesses, financial redistribution, capacity-building in communities, integration of community voices in decision-making	Policy influence, development of long-term sustainable business models, raising awareness on regenerative principles
<i>Tourism supply (local communities)</i>	Hospitality, cultural resources, labor, service provision, stewardship of natural and cultural assets, community-led tourism initiatives	Revenue generation, empowerment, knowledge exchange, self-determined tourism models, cultural preservation	Business expansion, improved infrastructure, enhanced cultural appreciation, local leadership in tourism development, increased self-sufficiency	Strengthened social cohesion, increased resilience, sustained local traditions, intergenerational transfer of cultural knowledge
<i>Regulative system (governments, institution and their policies)</i>	Legislation, funding, ethical standards enforcement, commitment to equitable policies, protection of vulnerable communities	Protection of local interests, environmental conservation, incentive programs, promotion of responsible tourism development	Economic redistribution, improved public services, accountability of tourism businesses, balancing growth and sustainability	Long-term shift towards sustainable tourism governance, regional development, transformation of tourism into a tool for regeneration
<i>Nature (environment, biological ecosystems)</i>	Ecosystem services, environmental setting	Attraction for tourists, contribution to wellbeing, integration of eco-friendly tourism practices	Enhancement of local environmental awareness, nature-based solutions for sustainability, preservation of ecological balance through tourism revenue	Climate resilience, restoration of degraded areas, integration of nature into wellbeing tourism, responsible use of natural assets for future generations
<i>Culture (heritage, traditions, knowledge)</i>	Cultural identity, local knowledge, traditions, intangible heritage, community consent in cultural representation	Tourism appeal, preservation of cultural heritage, education of tourists, cultural tourism designed with ethical considerations	Strengthened cultural economy, revitalization of traditions, increased recognition of indigenous and marginalized cultures	Global cultural exchange, increased representation of diverse voices, heritage continuity, long-term sustainability of cultural traditions

5. Conclusions and Discussion

This study has identified key similarities and differences in stakeholder roles and responsibilities across VT, CBT, and RT, demonstrating how these approaches can complement each other to enhance responsibility in tourism. By examining their input-output relationships, it becomes evident that integrating their strengths can address ethical and structural gaps, ultimately fostering a more accountable and sustainable tourism ecosystem.

A key insight from the analysis is the essential role of intermediaries in shaping responsible tourism experiences, particularly through ethical decision-making, fair trade practices, and digital facilitation. Likewise,

local communities, as both hosts and beneficiaries, emerge as central stakeholders whose agency in tourism development must be strengthened. The regulative system remains a crucial factor in ensuring ethical tourism operations, though policy frameworks should evolve to better recognize informal and community-led initiatives. Furthermore, nature and culture are not merely passive resources but active contributors to tourism's sustainability, requiring holistic stewardship across all three approaches.

By integrating VT, CBT, and RT, this study provides a conceptual basis for improving tourism governance and stakeholder collaboration. A key limitation of this study is its reliance on theoretical stakeholder mapping, which, while comprehensive, does not account for contextual variations in different destinations, particularly important within the regenerative concept, or empirical validation of stakeholder interactions. Future research could examine how these approaches function in practice, what is the degree of awareness of stakeholders of their respective roles, and how they navigate conflicts between intended and actual responsibilities.

References

- Anderson, A., Kim, R., & Larios, K. (2017) Voluntourism: The Economic Benefit and Societal Costs of Short-Term Mission Trips. *International Journal of Health and Economic Development*, 3(2), 28-37.
- Asia-Pacific Economic Cooperation (2022) *Handbook on developing community-based entrepreneurship (CBE) in rural tourism through digital empowerment*. APEC Secretariat. <https://www.apec.org/publications/2022/02/handbook-on-developing-community-based-entrepreneurship-%28cbe%29-in-rural-tourism-through-digital-empowerment>
- Bellato, L., Frantzeskaki, N., & Nygaard, C. (2022) Regenerative tourism: a conceptual framework leveraging theory and practice. *Tourism Geographies*, 25(4), 1026–1046. <https://doi.org/10.1080/14616688.2022.2044376>
- Bentele, N.E. (2023) *Transformative travel and volunteer tourism: their interaction and influence on local communities and tourists*. Hochschule Harz.
- Blackstock, K. (2005) A critical look at community based tourism. *Community Development Journal*, 40(1), 39-49.
- Brown, S. (2005) Travelling with a purpose: understanding the motives and benefits of volunteer vacationers. *Current Issues in Tourism*, 8(6), 479-496. <https://doi.org/10.1080/13683500508668232>
- Cave, J., & Dredge, D. (2020) Regenerative tourism needs diverse economic practices. *Tourism Geographies*, 22(3), 503-513. <https://doi.org/10.1080/14616688.2020.1768434>
- Chatkaewnapanon, Y., & Lee, T. (2022) Planning Sustainable Community-Based Tourism in the Context of Thailand: Community, Development, and the Foresight Tools. *Sustainability*, 14(12):7413, 1-13. <https://doi.org/10.3390/su14127413>
- Dangi, T.B., & Jamal, T. (2016) An Integrated Approach to “Sustainable Community-Based Tourism”. *Sustainability*, 8(475), 1-32. <http://dx.doi.org/10.3390/su8050475>
- Giampiccoli, A., & Mtapuri, O. (2012) Community-based tourism: An exploration of the concept(s) from a political perspective. *Tourism Review International*, 16, 29-43. <http://dx.doi.org/10.3727/154427212X13431568321500>
- Goodwin, H., & Santilli, R. (2009) Community-Based Tourism: A Success? *ICRT Occasional Paper 11*, 1-37.
- Hall, C.M. & Page, S.J. (2006) *The Geography of Tourism and Recreation: Environment, place and space* (3rd edn). Routledge.
- Han, H., Lee, S. & Hyun, S.S. (2020) Tourism and Altruistic Intention: Volunteer Tourism Development and Self-Interested Value. *Sustainability*, 12(5): 2150, 1-14. <http://dx.doi.org/10.3390/su12052152>
- Hernandez-Maskivker, G., Lapointe, D., & Aquino, R. (2018) The impact of volunteer tourism on local communities: A managerial perspective. *International Journal of Tourism Research*, 20(5), 1-10.
- Heslinga, J. (2022) Regenerative tourism: moving beyond sustainable and responsible tourism. <https://www.cbi.eu/market-information/tourism/regenerative-tourism>
- Hossain, A. (2023) Human Relationship with Nature, Indigenous Ways of Living and Regenerative Tourism Framework. *Journal of Sustainability and Resilience*, 3(1), 1-9.
- Keskinen, P., Arvila, N., Winschiers-Theophilus, H. & Nieminen, M. (2020) The Effect of Digital Community-Based Tourism Platform to Hosts' Livelihood. *Evolving Perspectives on ICTs in Global Souths. IDIA 2020*, vol 1236. https://doi.org/10.1007/978-3-030-52014-4_1
- Lee, S., & Joo, D. (2023) Intermediary organizations as supporters of residents' innovativeness and empowerment in community-based tourism. *Journal of Sustainable Tourism*, 32(8), 1534–1556. <https://doi.org/10.1080/09669582.2023.2247179>
- Liang, A. (2022) Consumers as co-creators in community-based tourism experience: Impacts on their motivation and satisfaction. *Cogent Business & Management*, 9:1, 2034389, 1-19. <https://doi.org/10.1080/23311975.2022.2034389>
- McGehee, N. & Andereck, K. (2009) Volunteer tourism and the “voluntoured”: the case of Tijuana, Mexico. *Journal of Sustainable Tourism*, 17(1), 39-51. <http://dx.doi.org/10.1080/09669580802159693>
- Mtapuri, O., Camilleri, M., & Dłużewska, A. (2021) Advancing community-based tourism approaches for the sustainable. *Sustainable Development*, 30(3), 423-432. <https://doi.org/10.1002/sd.2257>
- Mustonen, P. (2005) Volunteer tourism: postmodern pilgrimage? *Journal of Tourism and Cultural Change*, 3(3), 160-177. <https://doi.org/10.1080/14766820608668493>
- Naranjo Lluart, M. (2022) Theoretical Model for the Analysis of Community-Based Tourism: Contribution to Sustainable Development. *Sustainability*, 14(17):10635, 1-41. <https://doi.org/10.3390/su141710635>

- Ngo, T., & Creutz, S. (2022) Assessing the sustainability of community-based tourism: a case study in rural areas of Hoi An, Vietnam. *Cogent Social Sciences*, 8:1, 2116812, 1-21. <https://doi.org/10.1080/23311886.2022.2116812>
- Pollock, A. (2019) Flourishing beyond sustainability. *ETC Workshop in Krakow*.
- Pompurová, K. & Marčeková, R. (2017) Are the Volunteer Projects Included in Package Holiday Tour? Case Study Evidence from the Slovakia and Czech Republic. *Journal of Tourism and Services*, 8(15), 19-26.
- Pompurová, K., Marčeková, R., Šebová, L., Sokolová, J., & Žofaj, M. (2018) Volunteer Tourism as a Sustainable Form of Tourism—The Case of Organized Events. *Sustainability*, 10(5):1468, 1-12. <https://doi.org/10.3390/su10051468>
- Pompurová, K., Sokolová, J., & Cole, D. (2020) Domestic Volunteer Tourism Demand in Slovakia. *European Journal of Tourism Research*, 25:1509, 1-15.
- Ribov, M. (2014) In search for solutions for the challenges to tourism. *11th International Scientific Conference "Smart Specialization of Bulgaria"*, 753–764.
- Richards, G. & Hall, D. (2002) The community: a sustainable concept in tourism development? In: *Tourism and Sustainable Community Development*. Routledge. 1-14.
- Röntynen, R. (2022) Voluntourism in Finland: between profitability and public benefit. In: Tunkkari-Eskelinen, M. & Törn-Laapio, A. (Eds.), *Special Issues in Responsible Tourism Vol. 2*, 56-81. <https://urn.fi/URN:ISBN:978-951-830-667-5>
- Röntynen, R. (2024) Aspects of Ecosystem Approach in Governing a Tourism Destination. *Proceedings of the 7th International Conference on Tourism Research 2024*, 7(1), 443-451. <https://doi.org/10.34190/ictr.7.1.1991>
- Röntynen, R., & Tunkkari-Eskelinen, M. (2022) The Potential of Voluntourism in Central Finland. *Proceedings of the 5th International Conference on Tourism Research 2022*, 5(1), 353-361. <https://doi.org/10.34190/ictr.15.1.143>
- Röntynen, R. & Tunkkari-Eskelinen, M. (2024) Voluntourism in the Context of Community-Based Tourism, and Regenerative Tourism: A Theoretical Exploration Focusing on Responsibility. *Proceedings of the 7th International Conference on Tourism Research 2024*, 7(1), 340-348. <https://doi.org/10.34190/ictr.7.1.2019>
- Selen, W. & Ogulin, R. (2015) Strategic Alignment across a Tourism Business Ecosystem. *Athens Journal of Tourism*, 2(3), 167-178. <https://doi.org/10.30958/ajt.2-3-3>
- Snyder, H. (2019) Literature review as a research methodology: An overview and guidelines. *Journal of Business Research*, 104, 333-339. <https://doi.org/10.1016/j.ibusres.2019.07.039>
- Thomassin, P.J. (2018) The Evolution of Input–Output Analysis. *Applications of the Input–Output Framework*, 9-36. https://doi.org/10.1007/978-981-13-1507-7_2
- Torraco, R.J. (2005) Writing integrative literature reviews: Guidelines and examples. *Human Resource Development Review*, 4, 356–367. <https://doi.org/10.1177/1534484305278283>
- Tunkkari-Eskelinen, M., & Röntynen, R. (2023) Designing a model of commercial voluntourism services. *Proceedings of the 6th International Conference on Tourism Research*. 6(1), 490-495. <http://dx.doi.org/10.34190/ictr.6.1.1353>
- van Doore, K., & Nhep, R. (2023) Orphanage Trafficking and the Sustainable Development Goals. *Institutionalised Children Explorations and Beyond*, 10(1), 76-84. <https://doi.org/10.1177/234930032311559>
- Wearing, S. (2001) *Volunteer tourism: Experiences that make a difference*. Wallingford: CABI.
- Wearing, S. & McGehee, N. G. (2013) Volunteer tourism: A review. *Tourism Management*, 38, 120-130.
- Wearing, S., Young, T., & Everingham, P. (2017) Evaluating volunteer tourism: has it made a difference? *Tourism Recreation Research*, 42(4), 1-10. <http://dx.doi.org/10.1080/02508281.2017.1345470>
- Wolters, M. (2021) *Measuring the effect of community-based tourism*. Hochschule Harz.
- Zielinski, S., Jeong, Y., Kim, S., & Milanés, C. (2020) Why Community-Based Tourism and Rural Tourism in Developing and Developed Nations are Treated Differently? A Review. *Sustainability*, 12(15):5938, 1-20. <https://doi.org/10.3390/su12155938>

Development of Health Tourism Promotion: The Case of Kvarner Health Tourism Cluster

Daniel Zadro¹, Hrvoje Jakopović² and Andrija Petar Bošnjak^{3,4,5}

¹University of Rijeka, Faculty of Economics and Business, Rijeka, Croatia

²University of Zagreb, Faculty of Political Science, Zagreb, Croatia

³University of Mostar, Faculty of Medicine, Mostar, Bosnia and Herzegovina

⁴University of Rijeka, Faculty of Dental Medicine, Rijeka, Croatia

⁵Adria Dental Group, Rijeka, Croatia

daniel.zadro@medika.hr

hrvoje.jakopovic@fpzg.hr

andrija.petar.bosnjak@adriadental.com

Abstract: This paper examines the Croatian region of Kvarner as one of the most popular tourism destinations in Croatia and the way in which health tourism contributes to a better image of the destination. The promotional activities of health tourism are examined from a communication and economic perspective. Using the example of the Kvarner Health Tourism Cluster, authors are examining which promotional tools the cluster uses to popularize health tourism in Kvarner, but also how the organizations that belong to the cluster contribute to the destination attractiveness. The Kvarner Health Tourism Cluster was chosen as a case for the analysis as it enjoys a high status and recognition in the international environment, which is confirmed by the fact that it is a multiple finalist and winner of the IMTJ Medical Travel Awards and selected for some other prestigious awards in health tourism. The development of the Kvarner Health Tourism Cluster in promotional activities and economic indicators are tracked from 2016 to the present days. The authors want to find out how promotional tools and strategies have changed over the years and how this has affected the economic success of the cluster and associated organizations. The contribution of this paper is reflected in the identification of the most important promotional approaches and strategies for creating an image of an attractive destination for health tourism, as well as the most important economic indicators of health tourism success. Health tourism is also analyzed through examining different forms of health tourism, such as dental tourism. By comparing different forms of health tourism, the authors aim to describe the similarities and differences in promotion and economic indicators in relation to each form of tourism within the cluster. The “architecture” of the cluster is examined to show how the organizations are connected and contribute to the success of the cluster in general.

Keywords: Health tourism, Destination image, Economic indicators, Promotion, Kvarner health tourism cluster

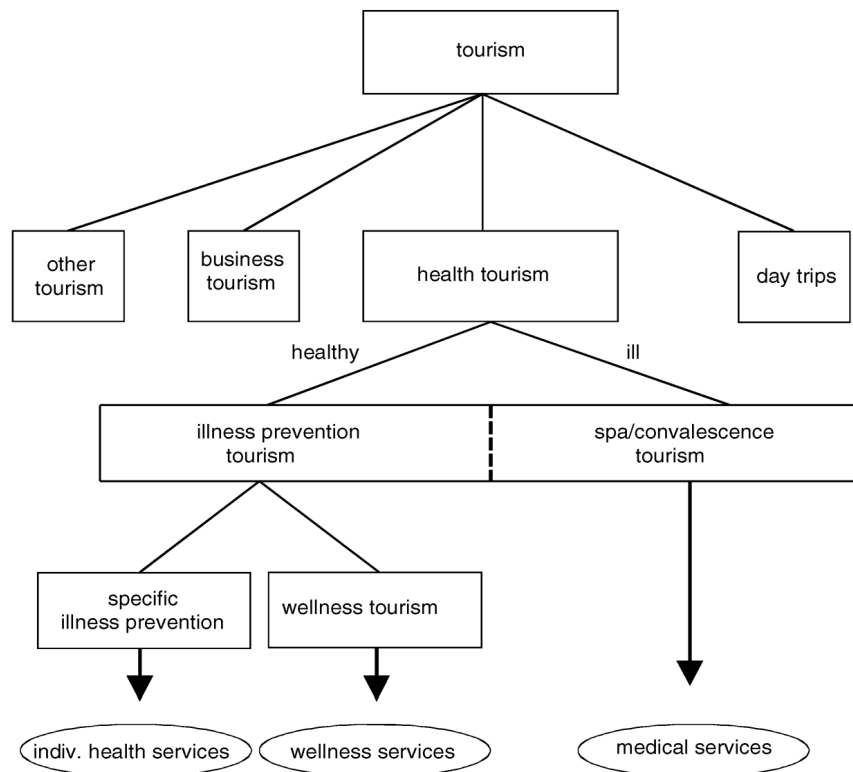
1. Introduction

This paper explores the unique aspects of health tourism promotion using the example of the Kvarner destination and the Health Tourism Cluster. The analysis of scientific research (Cetin, G. and Bilgihan., 2016; Manthiou et al., 2023) shows that the location of a tourism destination is of paramount importance for the health of visitors, as natural factors such as climate conditions, clean air and proximity to the sea can significantly contribute to the physical and mental health of tourists. A tourism destination is defined as a geographical area that attracts visitors, encompassing key characteristics such as accommodation capacities, attractions, marketing efforts, coordination and legislative regulations (Morrison, 2023). In the context of health tourism, the above factors become even more important as destinations such as Kvarner use their unique advantages, including specialized wellness and medical services, to attract international tourists

Kvarner region, as one of the leading Croatian destinations for health tourism, applies a specific approach to the promotion of its health services, which combines the natural resources with modern tourism and medical content. The aim of this paper is to analyze how the promotional activities of the Health Tourism Cluster contribute to increasing recognition of the Kvarner region on the international scene and its positioning as an attractive destination for health tourism.

Health tourism refers to travel with the aim of improving or preserving health. The International Union of Tourist Organizations (IUTO) defined health tourism in 1973 as “the provision of health services using a country’s natural resources, especially mineral waters and climate” (Smith and Puczkó, 2015). Health tourism subcategories are: “medical tourism, thermal tourism, spa and wellness tourism, tourism for the elderly, sports tourism and tourism for people with disabilities” (Hunjet et al., 2024). This form of tourism includes travel to use treatments, therapies or activities that improve or maintain certain health conditions. “The primary goal of health tourism is to contribute to the physical, mental and spiritual health of individuals through medical and wellness activities” (Hunjet et al., 2024). It is important to distinguish between the closely related concepts of health tourism and

medical tourism. These two terms are often used interchangeably in common discourse. Although these are overlapping concepts, health tourism is a broader term that also encompasses medical tourism, so Carrera and Bridges (2014) define this relationship as follows: health tourism as “the organized travel outside one's local environment for the maintenance, enhancement or restoration of an individual's wellbeing in mind and body” while medical tourism is perceived as “the organized travel outside one's natural healthcare jurisdiction for the enhancement or restoration of the individual's health through medical intervention”. Figure 1 shows the classification of different forms of tourism.



Source: Mueller i Kaufmann (2001: 8)

Figure 1: Classification of tourism types

In a competitive tourism market, where tourist demands are increasingly complex, tourism boards and other tourism stakeholders are striving to stand out from the competition by being recognizable and unique. For many tourism destinations, it is no longer enough to build an image of attractiveness based on a single advantage, such as natural beauty or cultural heritage. Instead, added value is expected to be created through a diverse offering, such as unique gastronomic experiences, adventure activities, sustainable practices, entertainment content and high-quality health services.

Kvarner is a specific Croatian region that is recognized for its benefits for health and well-being, since it is an area of a pleasant climate where mountainous and coastal nature merge. Berc Radišić et al. (2012) therefore point out that health tourism in Kvarner is promoted through the image of “an eminent Adriatic destination for wellness, thalassotherapy, and medical programs”. Kvarner is today profiled as the only region in Croatia that has formalized cooperation between stakeholders from different sectors, by establishing the Kvarner Health Tourism Cluster. Cooperation within the Cluster enables synergy of expertise from the medical, tourism and scientific sectors.

Global competition in the health tourism sector encourages destinations to continuously develop new products in order to stand out from the competition. Some of these products integrate health tourism components with other types of tourism (Polat and Öztürk, 2021) such as sports or cultural tourism, while others increase their attractiveness through the application of innovative practices. The Kvarner Health Tourism Cluster is an example of such an integrative approach that enables synergy between different sectors, including the pharmaceutical industry, tourism organizations, educational institutions and healthcare institutions. Promotion plays a

significant role in this process, serving as a key tool for increasing the recognition and competitiveness of the destination.

2. Unique Aspects of Promotion in Health Tourism

Health tourism managers increasingly rely on marketing and branding to attract and satisfy their consumers (Roman et al., 2022). Promotion in health tourism requires a specific approach, given that it differs from the promotion of other types of tourism. Marketing in tourism is increasingly moving from the use of traditional marketing tools to the implementation of digital technologies (Chamboko et al. 2021), which is especially evident in health tourism, where the importance of electronic communication is growing. Health tourism businesses are increasingly directing their activities towards digital channels in order to reach target groups more efficiently.

Promotion of tourism destinations implies an integrated approach in which different strategies and tactics of marketing and PR experts are intertwined. The combination of these communication activities is particularly pronounced in the process of tourism destination branding. Promotion of destinations highlighting health tourism benefits has its own unique characteristics. It is a promotion aimed at tourists who are looking for and have specific expectations from a unique experience during their stay in the destination. The results of the study by Han et al. (2017) show that health tourism encourages less engagement or participation than entertainment tourism, leisure tourism, and cultural tourism. Furthermore, the respondents who are most interested in this form of tourism are the population in their forties and fifties, and it is also specific that those who earn over \$4,000 per month opt for health tourism. Women are also more interested in this form of tourism than men (Han, Lee & Ryu, 2017). However, these preferences are influenced by cultural and other factors, so the results cannot be fully generalized to all tourists, but the results are indicative and show, given sociodemographic characteristics, which target audiences are addressed by tourism stakeholders in promoting destinations focused on health tourism. Based on the results of the survey, Han et al. (2017) propose several guidelines for increasing tourist participation in health tourism: 1. Creating travel (and also tourism) products that are thematically oriented towards health, in line with market demand; 2. Increasing promotional activities focused on health for all tourists, for example by organizing various exhibitions and events that indicate the attractiveness of this form of tourism.

Promotion of health tourism implies a specific discourse that focuses on the health benefits of tourists who prefer this form of experience with a tourism destination. In their research, Cortés de los Ríos and Corral Hernández (2016) studied, from a linguistic perspective, the promotional discourse on the official websites of stakeholders promoting health and beauty in the territory of Andalusia. From their analysis, several observations emerge about how the attractiveness of health services can be stimulated among tourists, and for this purpose Andalusian health promoters use the following positive adjectives: "bubbling, rejuvenating, exfoliating, purifying, oxygenating, curative, medicinal, refreshing, revitalizing, relaxing, analgesic and toning. Some examples taken from the corpus are bubbling massage, rejuvenating facial massages, exfoliating massage, purifying properties, oxygenating spa, curative properties, medicinal thermal waters, refreshing and revitalizing treatment, relaxing, analgesic and toning action". (Cortés de los Ríos & Corral Hernández, 2016). The specificity of addressing tourists who prefer or are inclined to use health services, within the intention of a visit to a tourism destination, includes the use of second-person personal pronouns with the purpose of direct and almost personalized addressing of the tourist as opposed to mass addressing of a group of consumers (Cortés de los Ríos & Corral Hernández, 2016). This can encourage the perception of the service provider's commitment. Cortés de los Ríos & Corral Hernández (2016) also point out that metaphors are very often used in promotional discourse for health services, thus trying to subtly encourage tourists to think about pleasure and in a figurative sense to evoke the experience of using the service.

Tourists visit tourism destinations for many reasons and are motivated by achieving a unique tourist experience. Mendes (2016) states that this experience is personal, inclusive, co-created with other tourists, intangible, and represents a staging created through various activities in a certain space. From this perspective, the uniqueness of experiences that include health services can also be studied. Studies on health-related behavior show that consumers create their own beliefs about what is healthy and based on these beliefs, they make decisions about the use of health services (Chang & Beise-Zee, 2013). This implies that it is important to have in-depth knowledge of geographic, demographic, psychographic, and behavioral variables when segmenting tourists (Kotler et al., 2006). The results of a study by Hunjet et al. (2024) indicate that most respondents consider the presence of health and wellness services to be a key factor in choosing a destination.

Since more and more tourists tend to use sources on the Internet when getting information about a destination, the concept of e-tourist has developed. This increasingly frequently used term implies an increasing and

important role of digital tools in organizing trips and visits to tourism destinations. E-tourist is defined as "the type of tourist who makes effective use of ICTs in the process of purchasing decision and while purchasing tourism products, during tourism experiences and in the evaluation process of tourism experiences." (Odemis, 2022). There is an increasing number of stakeholders in tourism that base their promotion on the use of digital tools. The study, which is dedicated to the development of health tourism and medical tourism on the island of Kish, shows how important it is to develop websites dedicated to these contents, to use digital advertising for the purpose of informing about hotel infrastructure and locations where the desired health services can be provided to tourists, to launch media campaigns which are dedicated to the promotion of health tourism for domestic and foreign tourists in cooperation with the tourist boards (Kazemha & Dehkordi, 2017). Another example like the E-Tour Facilitator Platform shows how digital platforms can easily connect different health services with the needs of patients/tourists and serve as another form of promotion (Halkiopoulou et al., 2020). On the example of medical tourism in India, Crooks et al. (2011) point out the importance of promoting and applying advanced technologies, emphasizing the advantages of safe and advanced health treatment, and avoiding messages that emphasize the low cost of health services due to the possible creation of a perception of low-quality services. Following the case of India, the promotion and growth of Indian medical tourism is, according to Mishra & Sharma (2021), connected with the development of soft and language skills. Regarding the promotion of health tourism in the Kvarner region and the use of communication tools, Berc Radišić et al. point out that a mix of modern promotional methods is used, which includes "advertising, sales promotion, public relations and personal selling" (2012: 173).

3. Analysis of Health Tourism Promotion of the Kvarner Cluster

Health tourism in Croatia has a long history and a rich tradition that has developed in accordance with natural resources and market needs. Each region in Croatia contributes to the development of this sector through its specific advantages, which include natural resources, cultural heritage and modern infrastructure. The development of health tourism in continental Croatia began in the early 20th century, primarily through spas, wellness and specific branches such as thermalism and hydrotherapy. In this context, the Kvarner region further stands out with its unique model of cooperation and integration of key stakeholders in the health tourism sector. According to research by Jónás-Berki et al. (2015), close cooperation among all stakeholders in health tourism starts from "tourism service providers, health care institutions, municipalities and public authorities".

The aim of the case study is to examine the promotional tools that can be effectively used to promote health tourism and destinations. The case of the Kvarner Health Tourism Cluster was selected for analysis due to its international recognition and the unique mix of organizations involved, culture and the special natural conditions of the Kvarner region. The descriptive case study examines the development of the cluster from its foundation in 2014 until today with a special focus on promotional activities and communication tools. Secondary data was used for the qualitative analysis, including web sources, available research findings and academic publications.

3.1 Analysis of the Kvarner Cluster's Offering

The Kvarner Health Tourism Cluster, founded in 2014, brings together 39 institutions with more than 9,500 employees. Membership includes hospitals, medical and dental clinics, hotels, educational institutions, tourist boards and travel agencies, ensuring an integrated approach to the offer.

Table 1 provides an overview of the Cluster's membership structure, emphasizing the diversity of partners and their roles in delivering a comprehensive health-tourism product, ensuring the synergy of expertise needed to create an integrated and competitive offering in the market. One of the main advantages of the Kvarner region as a desirable health-tourism destination is its climatically favorable and therapeutically beneficial natural environment. Features such as its climate, terrain, flora, and fauna are increasingly utilized in tourism (Geić et al., 2010), while the integration of modern medical practices with the healing properties of the local environment further enhances the overall experience. The Cluster is particularly focused on offering innovative treatments that leverage the healing potential of Kvarner's natural resources, positioning the region as a leader in the development of medical tourism.

Table 1: Cluster Members

	Sector	No. of members	Members
1	TOURIST BOARDS	7	Kvarner Region Tourist Board, Cres Tourist Board, Crikvenica Tourist Board, Gorski Kotar Tourist Board, Mali Lošinj Tourist Board, Opatija Tourist Board, Rijeka Tourist Board
2	PHARMACEUTICS	1	Jadran-galenski laboratory d.d. (JGL)
3	HOSPITALS AND CLINICS	15	Clinical Hospital Center Rijeka, Community Health Center Rijeka, Emergency Medicine Institute of the Primorje-Gorski Kotar County, Pediatrics Plus Veli Lošinj, Health Resort Institution for Home Healthcare and Rehabilitation „Helena Smokrović“, Istrian Health Care Center, Orthopaedic and Rehabilitation Hospital “Martin Horvat” Rovinj, Polyclinic Analiza, Polyclinic Terme Selce, Special Hospital Dr. Nemec, Specialty Hospital Medico, Teaching Institute of Public Health Thalassotherapia Crikvenica, Thalassotherapia Opatija
4	DENTAL CLINICS	4	Dental Center Kalmar Implant Dentistry, Dental Clinics Rident, Dental Medicine Center Orto-Nova, Dental Clinic Dr. Jelušić
5	EDUCATIONAL INSTITUTIONS	3	Faculty of Economics and Business, Faculty of Tourism and Hospitality Management, Faculty of Dental Medicine
6	HOTELS	7	Amadria Park Opatija, Cresanka d.d., Jadran Hotels, Jadran Hotels & Camps, Liburnia Hotels & Villas, Lošinj Hotels and Villas, Le Premier
7	TRAVEL AGENCIES	2	MedAdria Travel, Agency Travel Agency Olivari

Source: Kvarner health tourism cluster (2024)

Table 2 presents an overview of the diverse services available to tourists, reflecting Kvarner's comprehensive approach to meeting varied health-tourism needs, making it additionally attractive to international tourists.

Table 2: Service offering within the Kvarner Health Tourism Cluster

	Sector	Services offered
1	TOURIST BOARDS	MICE (Meetings, Incentives, Conferences & Exhibitions)
2	PHARMACEUTICS	Aqua Maris product line that uses marine ingredients., Products for Allergie, Skin, Immunity and Women's health
3	HOSPITALS AND CLINICS	Primary care, Internal medicine, Tourist medicine, Occupational and sport medicine, Pediatrics, Dermatology, Medical wellness, Surgery, Specialized programmes for active ageing, Plastic surgery, Post-COVID pulmonary rehabilitation
4	DENTAL CLINICS	Oral surgery, Implantology, Prosthetics, Orthodontics, Plasma (PRP) treatments, Aesthetic dental medicine
5	EDUCATIONAL INSTITUTIONS	Numerous scientific and professional projects aimed at improving the tourism offering
6	HOTELS	Accommodation, Wellness & spa, Beauty Studios, Children's playground, Aesthetic beauty salons, Tennis courts, Congress tourism,, Bike rental, Fitness center
7	TRAVEL AGENCIES	Tour guide services, Rent-a-car service, Boat charter

Source: Kvarner Health Tourism Cluster (2024)

The process of traveling to medical destinations to receive the most modern medical treatments at the lowest possible cost requires thorough market research and identification of the unique advantages and core competencies of the host country as a medical destination (Bagga et al., 2020).

In conducting promotional activities at home and abroad, tourist boards have a significant role. According to the Act on Tourist Boards and the Promotion of Croatian Tourism, "Tourist boards are organizations that operate according to the principle of destination management, and are established for the purpose of promoting and developing tourism" that carry out tourism-related activities "in a way that they manage the destination at the level for which they were established" (Law, 2019: Article 4), and there are 7 such boards in the Kvarner region. The second mentioned segment of the Cluster's offer refers to pharmaceuticals, represented by Jadran-galenski laboratory d.d., as an established manufacturer of pharmaceutical products with a special emphasis on the Aqua Maris line, which combines the Adriatic heritage and supports a natural and healthy lifestyle. The company collaborates with other Cluster members on various projects of common interest, aiming to leverage collective strength and expertise in the health industry segment (JGL, 2020).

Furthermore, Kvarner's health tourism includes a wide range of health services, from public and private hospitals to health resorts. These facilities form a specific regional environment that ensures the health of the local population and tourists who come for treatment or recovery. Four dental clinics are included in the Cluster and over 70,000 procedures are performed there annually (Kvarner Health Tourism Cluster, 2024). Within the framework of the healthcare offer, the dental organizations that are members of the cluster pride themselves on the high quality of services, using the most modern technology and approach in every segment of dental care, thus providing patients with optimal results and improved oral health. These advanced services provide not only functional, but also aesthetic results that improve the quality of life and self-confidence of patients.

Scientific institutions play an extremely important role in the development of tourism in Kvarner, having professionally shaped and educated thousands of students. "The rising generation of healthcare professionals increasingly demands that their education prepare them to create and work in a more sustainable future" (Green and Legard, 2020). These institutions also participate in numerous scientific and professional projects that improve health tourism and contribute to its further development. As for hotels, there are seven members in total, with over 14,000 beds. In addition to high-quality accommodation, hotels offer a variety of services and facilities, including wellness and spa centers, beauty studios, children's playgrounds, aesthetic beauty salons, tennis courts, congress tourism, bicycle rental and fitness centers. These facilities allow guests to relax, recreation and active vacation, while congress tourism allows the organization of business events in modern and well-equipped spaces. With such an offer, the destination meets the needs and desires of both family guests and business travelers. These hotels and spa resorts can target high-end guests who are willing to spend significant amounts on luxury health services, but also the middle class who can afford mid-range services, thus attracting a wide range of visitors with different budgets (Goodrich, 1994). Travel agencies such as MedAdria offer accommodation, transfers, excursions and travel arrangements according to the wishes of the clients. Their focus on wellness and VIP services, such as the MedAdria Wellness Club, is important for the promotion of Kvarner as a destination for luxury and health tourism.

The growth of the health tourism sector is closely linked to the extension of the tourist season, which ensures greater capacity utilization and increases the income of destinations. Kvarner, given its specificity and wealth of natural resources, has the potential to attract visitors outside the main summer season, thus reducing the seasonality that is otherwise present in many tourist regions. This allows for the continuous operation of accommodation facilities, wellness centers, medical institutions and other key services, which significantly increases the economic impact of tourism throughout the year (Peršić and Janković, 2012).

The development of this type of tourism creates new jobs in the health, tourism and education sectors, which also creates benefits for local communities. By increasing the number of visitors coming for specialized treatments, the region can also expect the development of new infrastructure, which further stimulates the local economy. By integrating all these segments, the Kvarner health tourism cluster contributes to the sustainable economic development of the region and lays the foundations for long-term growth and competitiveness at the international level. It is estimated that in the past four years, around 280 thousand guests have visited the Kvarner region for health services. Most of them were foreign guests, primarily for dental services, and then in the field of various rehabilitation segments and selective forms of diagnostic, therapeutic/surgical procedures.

3.2 Promotion, Strategic Initiatives and Reputation of the Kvarner Health Tourism Cluster

The Kvarner Health Tourism Cluster employs specialized brands and services to attract diverse tourist segments, such as families with pets, cyclists, and hikers, through projects like "Kvarner Family" and its sub-brands "Pet," "Bike," and "Hike," offering tailored accommodations and outdoor activities. This approach aligns with Kvarner's reputation for promoting active lifestyles and family-oriented tourism while reflecting the regional slogan "Diversity is Beautiful." The "Kvarner Health and Wellbeing" project further enhances the region's profile in international tourism, highlighting its long-standing tradition in health tourism and showcasing its diverse medical facilities. Kvarner capitalizes on the therapeutic properties of its natural resources, including its crystal-clear sea and beneficial climate, emphasizing the concept of "therapy from the sea," which encompasses rehabilitation, anti-aging procedures, and relaxation techniques (Bates & Silkoff, 2003). Notable terms such as climatotherapy-thalassotherapy and post-COVID rehabilitation are central to its offerings, with studies demonstrating the effectiveness of such treatments, particularly in respiratory health improvement. For example, research by Zvonarek Valkovic (2012) found significant benefits for children with asthma who underwent climatotherapy-thalassotherapy.

Kvarner's positioning as a destination for natural therapies and recovery is supported by strategic initiatives and participation in international events that enhance its global visibility. The Cluster participated in the 6th Annual ACAP Conference, supported by the Primorje-Gorski Kotar County Tourist Board (TZ PGŽ), which provided an opportunity to connect with key stakeholders and strengthen global collaborations. At EXPO 2020 Dubai, Cluster members - including Jadran Galenski Laboratorij, Polyclinic Terme Selce, Thalassotherapy Opatija, Special Hospital Dr. Nemec, and Special Hospital Medico - showcased Kvarner's health and wellness offerings to a global audience. The "Full of Well Being" business workshop, organized by the Croatian National Tourist Board (HTZ) in collaboration with the Ministry of Tourism and Sports, enabled Cluster members to conduct over forty business meetings with potential partners. Such events offer exceptional opportunities to present Kvarner's health and wellness services as an attractive destination for international tourists, further solidifying its position on the global health tourism stage.

Additional initiatives include the first Terme Selce International Congress in 2022, supported by the Primorje-Gorski Kotar County Tourist Board, which addressed critical topics such as employee health and stress management, and participation in the European Medical Tourism Workshop in Abano Terme, where the Cluster introduced its offerings to the Italian market. The 10th Crikvenica International Health Tourism Conference in 2022 brought together experts from seven countries, further establishing Kvarner as a prominent player in global health tourism. These efforts are complemented by digital marketing strategies that utilize social media to provide clear and detailed information about medical services, facilities, and patient success stories, building trust among potential medical tourists. By emphasizing the region's natural therapeutic resources and successful treatment outcomes, Kvarner not only attracts international visitors but also fosters long-term confidence in the quality and effectiveness of its health tourism offerings, driving the region's continued growth in this sector. Table 3 shows the use of social networks in the promotion of Kvarner tourism and health services by five selected Cluster members.

Table 3 shows that Facebook is the most commonly used platform, followed by Instagram and YouTube. The organizations publish diverse content, ranging from medical service promotions to tourist attractions, which is tailored to their target audience. Posting frequency varies from daily to monthly, depending on the organization. Content includes text and video posts, virtual tours, blogs, and patient reviews. Each member has a unique strategy that aligns with their specific goals and target audience, whether it's potential patients, tourists, families, or students.

Table 3: Use of social networks in the promotion of Kvarner tourism and health services

Cluster Member	Social Networks	Type of Activity	Target Audience	Frequency of Posts	Type of Content
Thalassotherapy Crikvenica	Facebook, Instagram, YouTube	Promotion of medical services and therapies	Potential patients, tourists, lung patients	Daily/ Weekly/ Monthly	Text and video posts with information about services and success stories, information about discounts

Cluster Member	Social Networks	Type of Activity	Target Audience	Frequency of Posts	Type of Content
Dental Clinic Rident	Facebook, Instagram, YouTube, LinkedIn	Promotion of all dental services in one place	Potential patients, tourists, families	Daily/ Weekly/ Monthly	Text and video posts with case studies, patient reviews, introducing dental specialists, useful tips on dental hygiene
The Kvarner Region Tourist Board	Facebook, Instagram, YouTube	Promotion of Kvarner as a destination for various types of tourism (business, health, nautical, etc.)	Foreign and domestic guests, tourists of all generations and families	Daily/ Weekly/ Monthly	Text and video posts about numerous activities in the Kvarner area, attractive events
JGL	Facebook, Instagram, YouTube, LinkedIn	Education, Product promotion	Family, children	Weekly/ Monthly	Text posts about key products and the company
Faculty of Tourism and Hospitality Management	Facebook, LinkedIn	Information about important events, international, academic life	Students	Daily/Weekly	Text and video posts

Source: Thalassotherapy Crikvenica (2024), Dental Clinic Rident (2024), The Kvarner Region Tourist Board (2024), JGL (2024), Faculty of Tourism and Hospitality Management (2024)

Fetscherin and Stephano (2016) emphasize that patients choose tourism destinations with regard to the reputation of medical personnel and the recognition of medical facilities, factors that are increasingly influenced by social media presence and the messages communicated on these platforms. The quality and reputation of medical institutions, as well as the acknowledgment of specialists, are key motivators for international patients seeking healthcare services abroad. Social media amplifies this effect by allowing healthcare providers to showcase their expertise, share patient testimonials, and highlight institutional achievements, directly shaping perceptions and trust among potential clients.

This dynamic is particularly relevant for the Kvarner region, where institutions such as the Special Hospital Dr. Nemec and the Polyclinic Terme Selce play a pivotal role in shaping the region's image as an attractive health tourism destination. The reputation of these institutions and the recognition they receive from patients, both domestically and internationally, are further reinforced by strategic digital communication. The expertise and innovative approaches offered by these facilities, combined with the presence of highly educated medical professionals and effective use of social media, significantly enhance the region's appeal and competitiveness in the global health tourism market.

4. Conclusion

Health tourism is an important and specific form of tourism that has played an increasingly significant role in the recognition and attractiveness of tourism destinations in recent years. It has become an integral part of destination image creation and branding for locations with the environmental and infrastructural prerequisites necessary for the development of such tourism. The promotion of health tourism is unique in that it primarily emphasizes the health and well-being benefits for users of health services and the overall tourist experience. This leads to a specific discourse used in the promotion of health services, with digital content and platforms connecting tourists with desired health services becoming essential tools for decision-making regarding visits and stay arrangements at a destination. Communication with health tourism enthusiasts should be direct and highly personalized, highlighting the health benefits and the comfort provided by such a tourism experience. In order to make health tourism more accessible to a broader population of tourists, it is necessary to encourage the organization of events aimed at raising awareness about health for various groups of tourists based on age, gender, income, etc. An increasing number of stakeholders in health tourism have recognized the importance

of digital tools such as websites and social media for attracting tourists, including those operating in the Kvarner region. This is a region that possesses the prerequisites for strong development in this form of tourism.

The case of Kvarner Health Tourism Cluster shows an innovative cooperation model that integrates key stakeholders from various sectors, including healthcare institutions, hotels, educational institutions, and tourist organizations. This unique approach creates a synergy of expertise from the medical, tourism, and scientific sectors, resulting in a comprehensive offering that meets the growing global demand for high-quality healthcare services in an attractive tourist setting. Cluster members use diverse promotional channels, with a particular focus on digital platforms such as social media and websites, to effectively communicate their services to various market segments. Promotional messages highlight the region's unique advantages, including natural healing resources, high-quality medical care, and a rich tourism offer. Services encompass a wide range, from specialized medical treatments and dental services to wellness programs and rehabilitation, tailored to the diverse needs and preferences of guests. The Cluster not only attracts international patients but also fosters healthcare innovations, creates new jobs, and contributes to the overall economic growth of the region. Through strategic initiatives, participation in international events, and the effective use of digital marketing, Kvarner is positioning itself as a leading health tourism destination in Europe.

References

- Bagga, T., Vishnoi, S.K., Jain, S. and Sharma, R. (2020) "Medical tourism: treatment, therapy & tourism", *International Journal of Science & Technology Research*, Vol 9, No. 3, pp. 4447-4453.
- Bates, C.A. and Silkoff, P.E. (2003) "Exhaled nitric oxide in asthma: from bench to bedside", *Journal of Allergy and Clinical Immunology*, Vol 111, No. 2, pp. 256-262.
- Berc Radišić, B., Bašan, L. and Lasinger, J. (2012) "Promotion of health tourism in the Kvarner region", *International journal of management cases*, Vol 14, No. 2, pp. 170-177.
- Carrera, P.M. and Bridges, J.F. (2006) "Globalization and healthcare: understanding health and medical tourism", *Expert Review of Pharmacoeconomics & Outcomes Research*, Vol 6, No. 4, pp. 447-454. DOI:10.1586/14737167.6.4.447
- Cetin, G. and Bilgihan, A. (2016) "Components of cultural tourists experiences in destinations", *Current Issues in Tourism*, Vol 19, No. 2, pp. 137-154.
- Chamboko-Mpotaringa, M. and Tichaawa, T.M. (2021) "Tourism digital marketing tools and views on future trends: A systematic review of literature", *African Journal of Hospitality, Tourism and Leisure*, Vol 10, No. 2, pp. 712-726.
- Chang, L. and Beise-Zee, R. (2013) "Consumer perception of healthfulness and appraisal of health-promoting tourist destinations", *Tourism Review*, Vol 68, No. 1, pp. 34-47. DOI: 10.1108/16605371311310066.
- Cini, V., Drvenkar, N. and Banožić, M. (2015) "Health tourism development in continental Croatia", *Interdisciplinary Management Research XI*, pp. 1052.
- Fetscherin, M. and Stephano, R.M. (2016) "The medical tourism index: Scale development and validation", *Tourism Management*, 52, pp. 539-556.
- Geić, S., Geić, J. and Čmrlec, A. (2010) "Zdravstveni turizam egzistencijalna potreba u suvremenom društvu", *Informatologia*, Vol 43, No. 4.
- Green, M. and Legard, C. (2020) "Peer-teaching could help bring sustainable healthcare into the medical education curriculum", *Medical Teacher*, Vol 42, No. 5, pp. 598-599.
- Han, J. and Lee, T. (2017) "The promotion of health tourism products for domestic tourists", *International Journal of Tourism Research*, 20, pp. 1-10. DOI: 10.1002/jtr.2161.
- Hunjet, A., Kozina, G. and Vučaj, A. (2024) "Advantages and Challenges of Health Tourism Development in Croatia", *Athens Journal of Tourism*, Vol 11, No. 3, pp. 201-224.
- Jónás-Berki, M., Csapó, J., Pálfi, A. and Aubert, A. (2015) "A market and spatial perspective of health tourism destinations: The Hungarian experience", *International Journal of Tourism Research*, Vol 17, No. 6, pp. 602-612.
- Kazemha, A. and Dehkordi, K. (2017) "The Principles of Designing Hospital Hotel with the Approach of Health Tourism in Kish Island", *Journal of History Culture and Art Research*, Vol 6, No. 1, pp. 515-531. doi: <http://dx.doi.org/10.7596/taksad.v6i1.758>
- Kvarner Health Tourism Cluster (2024) *B2C 2024Ex4-novo-08-2024*, available at: <https://www.kvarnerhealth.hr/wp-content/uploads/2024/09/B2C-2024Ex4-novo-08-2024.pdf> (Accessed: 4 December 2024)
- Manthiou, A., Kuppelwieser, V.G. and Klaus, P. (2023) "Reevaluating tourism experience measurements: An alternative Bayesian approach", *Current Issues in Tourism*, Vol 26, No. 18, pp. 2948-2964.
- Morrison, A.M. (2023) *Marketing and Managing Tourism Destinations*, Routledge.
- Mueller, H. and Kaufmann, E.L. (2001) "Wellness tourism: Market analysis of a special health tourism segment and implications for the hotel industry", *Journal of Vacation Marketing*, Vol 7, No. 1, pp. 5-17.
- Ödemis, M. (2022) "Smart Tourism Destinations: A Literature Review on Applications in Turkey's Touristic Destinations", in N. Gustavo, J. Pronto, L. Carvalho and M. Belo (Eds.) *Optimizing Digital Solutions for Hyper-Personalization in Tourism and Hospitality*, pp. 131-153. IGI Global Scientific Publishing. DOI: 10.4018/978-1-7998-8306-7.ch007

- Panteli, A., Kompothrekas, A., Halkiopoulos, C. and Boutsinas, B. (2021) "An innovative recommender system for health tourism", in *Culture and Tourism in a Smart, Globalized, and Sustainable World: 7th International Conference of IACuDiT, Hydra, Greece, 2020*, pp. 649-658. Cham: Springer International Publishing.
- Peršić, M. and Janković, S. (2012) "The assessment of opportunities and assumptions of the Croatian health tourism development", *Journal of Business Management*.
- Polat, G. and Öztürk, İ. (2021) "Current supporting practices in health tourism", *Tourism Studies and Social Sciences*, pp. 375-391.
- Ríos, María & Hernández, Ana. (2016). "The promotion of health and beauty tourism through websites: a linguistic analysis". *Revista de Lenguas para Fines Específicos*, 22, pp. 62-83. DOI: 10.20420/rlfe.2016.317.
- Šegulja, S., Zvonarek-Valković, M., Buljević, D. and Volkmer-Starešina, R. (2015) "Rehabilitation of Allergic Diseases in Children—Climatothermal therapy as a Power Tool in Achieving Optimal Disease Control", in *Allergic Diseases-New Insights*, IntechOpen.
- Smith, M. and Puczkó, L. (2015) "More than a special interest: Defining and determining the demand for health tourism", *Tourism Recreation Research*, Vol 40, No. 2, pp. 205-219.
- Law on Tourist Boards and Promotion of Croatian Tourism (2019) *Narodne novine*, NN 52/2019. Available at: https://narodne-novine.nn.hr/clanci/sluzbeni/2019_05_52_990.html
- Zvonarek-Valković, M. (2012) Impact of climatothermal therapy on disease control in asthmatic children, *Master Thesis*, Faculty of Medicine Rijeka.

On the Road to Transformation: How Self-Drive Tourism Transforms Travelers

Xueying Zhang

Graduate School of Business Administration, Ritsumeikan University, Osaka, Japan

ba0747xp@ed.ritsumei.ac.jp

Abstract: Self-drive tourism, with its emphasis on traveler autonomy, independence, and engagement, plays a critical role in facilitating personal transformation. This study examines the transformative effects of self-drive tourism on travelers. Building on the concepts of experience and transformation economies, it highlights how tourism can transcend providing emotional experiences to foster deeper lifestyle transformations. In recent years, research on this topic has been conducted under the umbrella of transformational tourism. Tourism types such as volunteer tourism and studying abroad transform tourists through diverse experiences at their destinations. However, transformational tourism in the context of travel experiences between destinations remains underexplored. This study adopts a descriptive and interpretive narrative approach, using a semi-structured interview survey for data collection and analysis. The findings identify key factors driving tourist transformation: spontaneity, novel experiences, challenges, cultural shocks, and deep interpersonal connections formed during the journey. Notably, the confined space of cars in self-drive tourism promotes reflection, communication, and problem-solving, which are essential for sparking self-transformation. Additionally, traveling to multiple destinations provides continuous opportunities for reflection and learning, creating a cycle of action that supports ongoing personal transformations. The study further reveals that independence, problem-solving skills (such as handling car trouble or navigating unfamiliar routes), and interactions with travel companions significantly contribute to self-improvement. These experiences are closely tied to tourists' pursuit of authenticity, which amplifies their transformation by the journey's end. The findings contribute to the implementation of transformational tourism by identifying the mechanisms facilitating transformation in self-drive tourism. These insights are crucial for developing targeted marketing strategies aimed at consumers seeking not only adventure but also meaningful, transformative experiences. By understanding the factors that promote personal transformation, tourism providers can create authentic and engaging offerings to meet the growing demand for transformation-driven tourism.

Keywords: Transformational tourism, Self-drive tourism, Tourist transformation, Mobile experience, Self-Transformation, communication

1. Introduction

Pine and Gilmore (1999) identified four stages of customer expectations: commodities, products, services, and experience economies. The experience economy focuses on customers' emotions, aiming to provide them with memorable experiences. However, in recent years, the value of the experience economy has become commoditized, and attention has shifted to the next stage—transformation economy. In the transformation economy, customers are viewed as “aspirants” and companies are defined as “elicitors” that facilitate the realization of transformation (Pine and Gilmore, 1999). This shift indicates that customers seek not only emotional experiences but also authenticity that trigger lifestyle transformations.

Existential authenticity, arising from the darker aspects of life, is a state of being true to one's own values (Wang, 1999). Ivanovic (2022) indicated the role of transformative experiences in facilitating self-discovery and confirming one's true self. Accordingly, transformative tourism, which relates to uncovering a more authentic self, is attracting increasing attention (Reisinger, 2013).

Transformational tourism deepens one's self-awareness and connections with others, leading to growth and irreversible transformation. Many studies have focused on the types of tourism, for example, backpacker tourism (Noy, 2004), study abroad programs (Jin and Robledo, 2024), religious tourism (Jiang et al., 2023), and volunteer tourism (Kontogeorgopoulos, 2017). These forms of tourism can transform tourists and provide them with hedonic and eudaimonic well-being (Huang, Wang, and Wu, 2023). Most of these studies, however, focus on the experiences acquired at a destination, with limited attention given to the transformative potential of experiences gained en route to the destination.

Therefore, this study examines self-drive tourism as a means for tourists to satisfy their sense of adventure and maximize their desired experiences from origin to destination through their vehicles (Butler and Hannam, 2012). It also identifies the factors promoting tourists' transformation in this context. To this end, this study reviews the current state of research on transformational tourism through a literature review, with the aim of conducting qualitative research.

2. Literature Review

2.1 Factors Influencing Tourist Transformation

In recent years, an increasing number of studies on tourist transformation have focused on the factors and timing of such transformations. Lean (2012) investigated the transformation of the self through physical mobility and clarified the process by which travelers move beyond their constrained self-image to recognize a new self. The “before,” “during,” and “after” phases of travel are intricately intertwined, with the latter two having a particularly significant impact on transformation. Furthermore, Kirillova, Lehto, and Cai (2016) organized nine themes related to transformative tourism experiences and emphasized the importance of post-trip transformation processes.

Research on transformational factors for tourists is extensive. Kirillova et al. (2017) categorized the triggers of transformational tourism experiences into three categories: spontaneity/novelty, aesthetic experience, and self-development, with spontaneity/novelty being a particularly powerful factor. These episodes tend to occur toward the end of the trip, evoking intense emotions and a sense of connection with a grand entity.

Furthermore, Pung, Gnoth, and Chiappa (2020) proposed a tourist transformation model suggesting that marginal situations and cultural shocks induce transformation. They also stated that contextual stimuli promote the acquisition of skills and values and contribute to behavioral transformation. Pung and Chiappa (2020) identified interaction with locals and other travelers, challenges, sense of place experience, extended stays, and post-trip reflection as facilitators of tourist transformation, with “short stay,” “repetitive behavior,” and “lack of access to residents’ lifestyle” as inhibitors.

Pung et al. (2020) believed that contextual stimuli can enable tourists to clearly interpret experiences and acquire skills, values, and knowledge, thereby influencing their attitudes, habits, and behaviors. Authentic experience is required to promote tourist transformation. Travelers have been transformed through rites of passage, studying abroad, heritage, pilgrimage, adventure/challenge, service learning, healing/therapy, and spiritual journeys (Ross, 2010). However, research on tourist transformation in the types of tourism that can provide these contexts remains scarce, and the potential of other types of tourism should be explored. This study identifies the types of transformational tourism that are not mentioned in previous studies.

2.2 Types and Processes of Transformational Tourism

Recent research on transformational tourism has examined the transformation triggers and processes for tourists. For example, Noy (2004) revealed the relationship between external travel and internal self-transformation through the travel narratives of Israeli backpackers; Jin and Robledo (2024) explored how students studying in foreign countries experience transformation through travel; and Jiang et al. (2023) examined the impact of tourist-to-tourist interaction (TTI), prosociality, and interpersonal authenticity on existential transformation in religious tourism, and showed that TTIs strengthened emotional solidarity and promoted prosocial behavior.

Regarding the transformative process of volunteer tourism, Kontogeorgopoulos (2017) revealed the achievement of existential authenticity through self-reflection and self-discovery across cultural, social, and economic differences, while Magrizos and Kostopoulos (2020) examined the stages of transformation and their boundary conditions. Wolf, Ainsworth, and Crowley (2017) highlighted immersive experiences as a key driver of transformation based on five typologies, including health and nature, spiritual, and cultural travel.

Previous research on transformational tourism has focused on the experience “during” the trip (at the destination) and “after” returning home. Scant attention, however, has been paid to the experience of traveling between the two locations and the relationship between the travel experience and the “before,” “during,” and “after” stages of the trip. However, according to Hannam et al. (2014), the act of tourism travel not only accomplishes a specific goal but also fulfils the experiential needs of tourists. This study aims to identify the impact of mobility experience on connecting the “during” and “after” stages of the trip and on promoting authenticity.

2.3 Transformation of the Mobile Experience in Self-Drive Tourism

The use of privately owned or rented vehicles to engage in tourist activities while traveling from the point of origin to destination is called self-drive tourism (Prideaux et al., 2001). This form of travel is unique in that travelers are free to decide the time and route of their trip and enjoy independence (Lane and Waitt, 2007). Tourists can decide their travel time, location, and route to their destination and enjoy freedom and

independence while respecting their individuality (Prideaux and Carson, 2003). Such tourism also serves as a means of satisfying an individual traveler's sense of adventure and maximizing the desired experience (Butler and Hannam, 2012).

Broz and Habeck (2015) investigated the prevalence of car leisure in the context of changing travel habits in contemporary Siberia. Although the participants expressed dissatisfaction with road conditions and traffic congestion, they still did not view driving as a mere means of transportation or an intermediate step, but rather as an important part of a short vacation. The trip itself is part of the destination, lying within the same emotional geography as the destination.

Self-drive tourists often perceive themselves as "travelers," rather than "tourists," and tend to prefer "authentic experiences" and "local information" over "touristy" experiences (Taylor and Prideaux, 2008). Zhou and Huang (2016) explored self-driving travel motives among travelers in China and found that the natural attractions and fresh air experienced during the trip were direct motivators, while relaxation, independence/privacy, and enjoyment of convenience were potential motivators.

Butler et al. (2022) investigated the participation of rural South Australia in domestic tourism during the pandemic and the factors influencing travel, revealing that self-drive tourism was used as a means of (re)building connections with friends and family, as well as to enhance well-being by inducing positive emotions associated with a sense of adventure and discovery. Car use also provided flexibility in both choosing the destination and avoiding crowded or tourist-filled destinations.

Some studies have focused on the meaning of the "car" itself for tourists, pointing out that in the context of tourist mobility, it transforms from an "empty space" to a symbolic "home space" (Urry, 2006; Yang, Xu, and Hannam, 2022). For example, Yang, Xu, and Hannam (2022) examined Chinese road trippers' leisure automobile travel from the ontological premise of a "human vehicle" and discovered that they inhabit the car in four ways: driving, gazing, listening, and communicating. Through this embodied residence, the car is transformed into a "tourist residence" ("home away from home") space that protects them and evokes tourist sentiment, social interaction, and tourism meaning. While the use of the car reinforces autonomy and a sense of freedom through the choice of travel routes, it also provides a sense of safety to the tourist as a "shelter in a strange outside world," as well as a compulsion to communicate with fellow travelers.

In self-drive tourism, the ease of driving in a natural environment, the freshness of a new travel environment, the tension of facing an unfamiliar driving environment, and the enjoyment of interacting with fellow travelers enrich tourists' emotional experiences (Yang, Xu, and Hannam, 2022). However, the effect of these experiences on tourists' transformation is unclear. Therefore, this study aims to identify what motivates self-driving tourists and facilitates their transformation during their trips.

3. Methodology

3.1 Sampling and Data Collection

This study used a descriptive and interpretive narrative approach for data collection and analysis through a semi-structured interview survey. The narrative approach assumes that life is shaped by narratives and parallels the way individuals are asked about their experiences (Cohler, 1982). It has also been proven in previous studies (Kirillova, Lehto, and Cai, 2016; Noy, 2004; Pung and Chiappa, 2020) that qualitative research is appropriate for ascertaining a person's transformation in the context of their tourism experience.

Individuals who had experienced a transformation in self-driven tourism were selected for this study. The following criteria were used to select participants: first, they must have had at least two years of experience in self-drive tourism; and second, they must have demonstrated self-improvement through their experience.

Data were collected between July and September 2024. A preliminary questionnaire was administered to 12 participants with experience in self-drive tourism to assess whether they had experienced a transformation or not; these belonged to communities involved in car modifications that regularly conduct self-drive tourism. Six respondents indicated that they had undergone transformational experiences; semi-structured interviews were conducted to delve deeper into the details of these experiences (Table 1). The interviews were conducted either in person or online, lasting approximately 60 minutes. They were conducted in the form of reflective questions centered on the participants' past experiences of self-drive tourism. Specifically, we asked questions such as, "What factors prompted you to transform yourself?" "What events prompted you to transform yourself?" Verbatim transcripts were analyzed after obtaining confirmation from the participants.

Table 1: Details of interviewees

Participant	Gender and age	Nationality	Occupation	Years of self-drive tourism experience	Transformation experience (Yes/No)
A	F/36	China	Company employee	5 years	Yes
B	F/52	China	Housewife	7 years	Yes
C	M/43	China	Teacher	5 years	Yes
D	M/25	Japan	Student	2 years	Yes
E	F/28	Japan	Company employee	3 years	Yes
F	M/23	America	Company employee	3 years	Yes

3.2 Data Analysis

This study analyzed data from interviews using Steps for Coding and Theorization (SCAT), an analytical method that is effective for analyzing small qualitative datasets. SCAT provides clear procedures and explicit descriptions of the course of the analysis (Otani, 2011, translated by author).

SCAT involves four coding steps: identifying key terms in the data; generating external terms to paraphrase key terms; providing explanations for key terms; and identifying themes or constructs that emerge from the data (Otani, 2011, author's translation). The interview responses were coded, relationships between the codes were identified, and three common categories were derived: forced reflection and communication in a confined space, enhancing tourism experiences through problem-solving, and the interconnectedness of experiences across multiple destinations.

3.3 Ethical Considerations

Informed consent was obtained from all participants before data collection, providing a clear explanation of the study's objectives, methods, potential risks, and benefits. Participants were also informed of their right to withdraw at any stage without penalty. To ensure participant anonymity, personally identifiable information was removed from all datasets during transcription and analysis. Unique identifiers were used to link data while maintaining confidentiality. Audio recordings and transcripts were securely stored in encrypted digital formats, following institutional guidelines and relevant legal regulations. Data access was restricted to authorized research team members. After the project's conclusion, all data and backups were securely destroyed by a certified data destruction service to prevent unauthorized access. This destruction process was documented to ensure compliance with ethical and institutional standards.

4. Findings

4.1 Forced Reflection and Communication in a Confined Space

The interviews revealed that tourists participating in self-drive tourism could be classified into three types: planners, doers (drivers), and those who simply enjoy the experience. Planners are responsible for devising the destinations and routes for self-driving tours. Drivers drive according to these plans and, in some cases, make suggestions regarding the routes and destinations. Often, the driver doubles as a planner. Finally, there are those who neither plan nor drive, but enjoy sightseeing; such tourists also play a role in providing feedback to the planner and driver through in-car communication.

In the limited space of a car, the participants play their respective roles and communicate closely with each other, reflecting on each other's experiences and plans before moving on to the next project. In this process, they discuss questions such as "Why was this destination or route chosen?" and "Why was another option not chosen?" based on their senses, deepening their understanding of each other. [A7: I usually drive, while my wife is in charge of overall trip planning. I feel that I am gradually getting a clearer image of my own favorite places through communication with my wife during the trip.] Through such communication, some participants said that they were able to confirm for the first time the differences in their senses with others and learn new aspects about their family members. These new perceptions function as factors promoting self-improvement.

4.2 Deepening the Tourism Experience Through Troubleshooting

As per many interviews, the most memorable experiences of self-drive tourism were related to problems. Examples include flat tires, theft, getting lost, and illness. These issues add an element of uncertainty to tourism; however, by solving them, the tourism experience becomes more authentic. [C3: On the way to Tibet, I developed a high fever due to lack of oxygen. The scenery outside the car window was beautiful but I was not in the mood to see it. I felt like I was going to die. Many things started to come to mind, and I got off the car and was admitted to the hospital; after experiencing this, I feel like I have discovered that there are many things that need to be done before I die; otherwise, it will be a pity.] In this process, they are forced to reconfirm the shortcomings and strengths of other tourists who have faced trouble together and are encouraged to transform. [D8: There was a time when the car's navigation system stopped working en route to the destination. Perhaps, we were passing through an area with a bad signal. When I was lost, my friend navigated me using a map, and I arrived safely. He always seemed lazy and unreliable, but I was surprised to see how dependable he could be when push came to shove.]

4.3 Interconnectedness of Experiences Across Multiple Destinations

Unlike other forms of tourism, self-drive tourism is characterized by multiple destinations. Due to this characteristic, unlike other forms of tourism wherein the experience concludes at a specific destination, self-drive tourism overlaps experiences across multiple destinations. Furthermore, by reflecting on the path to the next destination, it is expected that the experiences at multiple destinations will interact and be reflected in the next plan. This immediate cycle of thought and practice confirms new perceptions gained at each destination and facilitates the process of integrating them into oneself, thereby promoting transformation. [B11: During a long journey, each time you arrive at a destination, your memory of the previous destination resurfaces, and you compare them. Furthermore, by comparing with my life until now, something new has happened, and the world seems different.] In other words, in self-driven tourism, the experiences of multiple destinations can interact with each other through reflection during a journey, eventually resulting in transformation.

5. Discussion

This study's findings prove that self-drive tourism can promote tourist transformation. Furthermore, the study identified factors encouraging such transformations. Additionally, the interviews revealed several points that are consistent with the results of previous studies, such as Taylor and Prideaux's (2008), finding that self-driven tourists not only enjoy sightseeing, but also prefer more authentic experiences, such as making their own plans, exploring routes, and trying to solve problems. Furthermore, as revealed by Hallo and Manning (2009) and Zhou and Huang (2016), the purpose of self-drive tourism for many tourists is to "enjoy driving," "explore beautiful scenery," "spend time with friends and family," and "enjoy nature." However, this study's interview results revealed that, in addition to these purposes, there were also hidden objectives, such as identifying one's own shortcomings and strengths, including planning ability, problem-solving ability, and self-confidence. As revealed by Kirillova, Lehto, and Cai (2016), personal transformation in transformative tourism, characterized by increased existential authenticity and anxiety, is often induced during the trip, but usually manifests itself through post-trip reflection. Its hidden purpose can be fulfilled through the resolution of instabilities such as problems. However, one difference is that because self-driven tourism involves multiple destinations, transformation is induced during the trip and can manifest not only after the trip but also through reflection during the trip.

Furthermore, it was confirmed that many participants who experienced the transformation belonged to the same family. This is consistent with the findings of Butler et al. (2022) that "self-drive tourism is a place to (re)build connections with friends and family." Yang, Xu, and Hannam (2022) also revealed that the "car" functions as a "shelter against the unfamiliar outside world" and exerts a "compulsion to communicate" with fellow travelers, which is also consistent with the present results.

One of the limitations of this study is that cultural differences may influence the factors that trigger change when on the move. Although the sample size for this study was not very large, it consisted of tourists from three countries: China, Japan, and the United States. In the interviews, their more important motivations differed from each other, which may be due to cultural differences among the participants. Therefore, further research is needed to expand the sample size.

6. Conclusion

This study clarifies that tourists' experiences of self-drive tourism promote self-transformation. The interaction of communication and response to problems in the limited space of the vehicle and the experience of visiting multiple destinations during the trip transform self-perception and relationships with others, providing a more authentic experience and promoting transformation. The results prove that self-drive tourism is a type of tourism that can promote tourists' transformation and suggest that it functions as a means for personal growth and transformation. Further comparisons with other types of tourism are required through more detailed surveys in future studies, which may help ensure the implementation of transformational tourism and facilitate the development of corresponding marketing strategies.

Acknowledgement

This work was supported by JST SPRING (grant number JPMJSP2101).

References

- Broz, L. and Habeck, J. O. (2015) "Siberian automobility boom: From the joy of destination to the joy of driving there", *Mobilities*, Vol 10, No. 4, pp 552–570.
- Butler, G. and Hannam, K. (2012) "Independent tourist's automobilities in Norway", *Journal of Tourism and Cultural Change*, Vol 10, No. 4, pp 285–300.
- Butler, G., Szilic, G., Cutler, C. and Hay, I. (2022) "Road mapping recovery from the impacts of multiple crises: Framing the role of domestic self-drive tourism in regional South Australia", *Journal of Tourism and Cultural Change*, Vol 20, No. 6, pp 774–787.
- Cohler, B. J. (1982) "Personal narrative and the life course", in Baltes, P. and Brim, O. G. (eds.) *Life Span Development and Behavior* (Vol 4), Academic Press, New York, pp 205–241.
- Hallo, J. C. and Manning, R. E. (2009) "Transportation and recreation: A case study of visitors driving for pleasure at Acadia National Park", *Journal of Transport Geography*, Vol 17, No. 6, pp 491–499.
- Hannam, K., Butler, G. and Paris, C. M. (2014) "Developments and key issues in tourism mobilities", *Annals of Tourism Research*, Vol 44, No. 1, pp 171–185.
- Huang, X., Wang, P. and Wu, L. (2024) "Well-being through transformation: An integrative framework of transformative tourism experiences and hedonic versus eudaimonic well-being", *Journal of Travel Research*, Vol 63, No. 4. <https://doi.org/10.1177/00472875231171670>
- Ivanovic, M. (2022) "Revisiting the transmodern model of authenticity of transformatory experience", *African Journal of Hospitality, Tourism and Leisure*, Vol 11, No. 2, pp 494–510.
- Jiang T., Gao J., Zheng X. and Liao Y. (2023) "Engendering prosociality through tourist-to-tourist interaction in religious tourism: An existential transformative perspective", *Journal of Sustainable Tourism*. <https://doi.org/10.1080/09669582.2023.2277126>
- Jin, J. and Robledo, M. A. (2024) "Passport to transformation: Assessing transformative learning in overseas students through travel experiences", *Journal of Hospitality and Tourism Management*, Vol 59, pp 180–185.
- Kirillova, K., Lehto, X. and Cai, L. (2016) "Tourism and existential transformation: An empirical investigation", *Journal of Travel Research*, Vol 56, No. 5, pp 638–650.
- Kirillova, K., Lehto, X., and Cai, L. (2017) "What triggers transformative tourism experiences", *Tourism Recreation Research*, Vol 42, No. 4, pp 498–511.
- Kontogeorgopoulos, N. (2017). "Finding oneself while discovering others: An existential perspective on volunteer tourism in Thailand", *Annals of Tourism Research*, Vol 65, pp 1–12.
- Lane, R. and Waite, G. (2007) "Inalienable places: Self-drive tourists in Northwest Australia", *Annals of Tourism Research*, 34(1), pp 105–121.
- Lean G. L. (2012) "Transformative travel: A mobilities perspective", *Tourist Studies*, Vol. 12, No.2, pp. 151–172.
- Magrinos, S., Kostopoulos, I. and Powers, L. (2021) "Volunteer tourism as a transformative experience: A mixed methods empirical study", *Journal of Travel Research*, Vol 60, No. 4. <https://doi.org/10.1177/0047287520913630>
- Noy, C. (2004) "This trip really changed me: Backpackers' narratives of self-change", *Annals of Tourism Research*, Vol 31, No. 1, pp 78–102.
- Otani, T. (2011) "SCAT: Steps for Coding and Theorization – A qualitative theorization method with explicit procedures, easy to initiate and applicable to small-scale theorists", *Journal of Japan Society of Kansei Engineering*, No. 10, pp 155–160.
- Pine, B.J. and Gilmore, J.H. (1999) *The Experience Economy: Work is Theatre and Every Business a Stage*, Harvard Business School Press.
- Prideaux, B. and Carson, D. (2003) "A framework for increasing understanding of self-drive tourism markets", *Journal of Vacation Marketing*, Vol 9, No. 4, pp 307–313.
- Prideaux, B., Wei, S. and Ruys, H. (2001) "The senior drive tour market in Australia", *Journal of Vacation Marketing*, Vol 7, No. 3, pp 209–219.

- Pung, J. and Chiappa, G. (2020) "An exploratory and qualitative study on the meaning of transformative tourism and its facilitators and inhibitors", *European Journal of Tourism Research*, Vol 24, p 2404.
- Pung, J.M., Gnoth, J. and Del Chiappa, G. (2020) "Tourist transformation: Towards a conceptual model", *Annals of Tourism Research*, Vol 81, p 102885.
- Reisinger, Y (2013) *Transformational Tourism: Tourist Perspectives*, Cab Intl.
- Ross, S. L. (2010). "Transformative travel: An enjoyable way to foster radical change", *ReVision*, Vol 31, No. 2, pp 54-61.
- Taylor, A. and Prideaux, B. (2008) "Profiling four wheel drive tourism markets for desert Australia", *Journal of Vacation Marketing*, Vol 14, No. 1. <https://doi.org/10.1177/1356766707084220>
- Urry J. (2006) "Inhabiting the car", *The Sociological Review*, 54, pp 17–31.
- Wang, N. (1999) "Rethinking authenticity in tourism experience", *Annals of Tourism Research*, Vol 26, No. 2, pp 349–370.
- Wolf, I, D., Ainsworth, G. B. and Crowley, J. (2017) "Transformative travel as a sustainable market niche for protected areas: A new development, marketing and conservation model", *Journal of Sustainable Tourism*, Vol 25, No. 11, pp 1650-1673.
- Yang, P., Xu, H. and Hannam, K. (2022) "A touristic habitation: Automobilities of Chinese driving tourists", *Tourism Geographies*, pp 1–21.
- Zhou, Y. and Huang, X. (2016) "Aspects of lifestyle change in China: Motivations for self-drive travel – A Chinese domestic market perspective", *Journal of Travel & Tourism Marketing*, Vol 33, No. 6, pp 912-928.

PhD Research Papers

Virtual Reality for Responsible Tourism: A Case Study of Jordan's Coral Reef

Anita Andziak

Swiss School of Business and Management, Geneve, Switzerland

anita.andziak@ssbm.ch

Abstract: The present study examines the potential of immersive virtual reality (VR) experiences to shape more conscious and sustainable tourism attitudes, considering the dynamic challenges posed by mass tourism's negative environmental impact. VR enables the exploration of sensitive ecosystems, such as coral reefs, without the risk of damaging them, and this is the focus of the present study, which examines the potential of VR to shape more conscious and sustainable tourism attitudes. The study focuses on a coral reef in Aqaba, Jordan, a key marine ecosystem threatened by mass tourism. The experiment involved 527 participants who took a virtual tour of Jordan combined with education about coral reefs. A mixed-methods approach was used, and data were collected through surveys and interviews after the VR experience. The results indicate participants' strong emotional response to environmental issues and their willingness to adopt greener tourism practices, such as sustainable transportation and support for local initiatives. Many respondents considered virtual tourism a viable alternative to travel to sensitive destinations. The results may be useful for tourism organisations, policymakers and researchers working on sustainable tourism development and environmental education.

Keywords: Virtual reality (VR), Responsible tourism, Sustainable tourism, Coral reefs Jordan, Mass tourism

1. Introduction

The statistical data indicates that 790 million tourists travelled during the initial six-month period of 2024. This represents an increase of 11% relative to 2023 (UNWTO, 2024). The phenomenon of mass tourism is having an ever-increasing impact on the environment and the resources of planet Earth. In its 2020 report, the World Tourism Organization (UNWTO) specifically notes that the overuse of natural resources by mass tourism can lead to irreversible changes in ecosystems. It is evident that government intervention is a fundamental aspect in the resolution of this issue. As Smith and Richards (2019) observe, the dynamic growth of the global tourism industry may lead to the loss of natural and cultural values. The author identifies the greatest threat to destinations that attract the largest number of tourists. In their study, Lee and Syah (2018) provide an illustrative example of the impact of mass tourism on a specific destination: the island of Bali in Indonesia. It has been demonstrated that an excess of tourism infrastructure results in an ecological imbalance. This results in a violation of environmental stability. As Dudek and Kuziak (2017) and Gössling (2002) have observed, there is a risk that intensive tourism may lead to the destruction of cultural heritage. The available evidence indicates that an excessive level of tourism places considerable strain on the natural resources of an area. The impact is particularly evident in fragile coral reefs, delicate archipelagos and subarctic areas, as well as in national parks and areas under special protection (Buckley, 2012; Weaver & Lawton, 2017; Ólafsdóttir and Runnström, 2013; G, 2013). As Goodwin (2021) observes, the concept of responsible tourism is gaining ground, evidenced by increased interest in research and tourism policy. The views of Lee & Syah (2018) and Egresi (2016) are that residents of popular destinations often derive little benefit from increased tourism development. This has the effect of reinforcing the need for sustainable solutions that would benefit local communities more. The application of modern technologies, such as virtual reality (VR), offers innovative and environmentally friendly approaches to tourism.

They make it possible to have immersive and realistic travel experiences without having to physically visit places that are exposed to environmental degradation (Kask, 2018; Geng, 2022). There is evidence that VR enables consumers to explore places that are difficult to access or threatened. Such experiences can positively influence visitors' environmental attitudes and, most importantly, increase awareness of the need to protect these areas (Guttentag, 2010; Stainton, 2020; Beck et al., 2019). Furthermore, Fatma and Bhat (2023) posit that VR has the potential to increase tourists' tendency to engage in responsible behavior. The researchers emphasize that it can support the development of responsible tourism. The objective of this paper is to provide insight into the role of VR in promoting responsible tourism behavior. It is crucial to investigate the potential of VR as a tool to support the protection of sensitive ecosystems and cultural heritage areas. The paper discusses the applications of VR as an alternative to mass tourism, focusing on research on the impact of immersive technologies on tourists' attitudes towards sustainability using the example of the Red Sea Coral Reef in Jordan.

2. Literature Review

This chapter provides a comprehensive review of existing literature on responsible tourism, the environmental impact of mass tourism, and the role of virtual reality (VR) in promoting sustainable tourism. The literature is critically analysed to identify key themes, gaps, and areas requiring further exploration.

2.1 Responsible Tourism Research

Research on responsible tourism has predominantly focused on two main areas: sustainability and environmental protection (37%) and the impact of tourism on local communities (23%) (Ruhanen et al., 2015). Other significant themes include responsible tourism management, ethics, and social responsibility. According to Bramwell et al. (2008), responsible tourism emerged as a recognized research area in the 1980s alongside the growing discourse on sustainable tourism. More recent studies (Prasetyo, 2022) highlight the growing emphasis on practical applications of responsible tourism, particularly in fragile ecosystems, with the latest data revealing 176 publications from 2020 to 2021 focused on sustainable tourism applications.

Table 1: Distribution of research topics in responsible tourism. Source: Author's work

Variable	(n) %
Responsible Tourism Management	100 (19)
Tourism's Impact on Communities	121 (23)
Ethics & Social Responsibility	69 (13)
Socially Responsible Tourism	42(8)
Sustainability & Env. Protection	195 (37)

Mass tourism is damaging the environment and local communities, so it is important to practice responsible tourism to minimize these negative impacts and protect the natural world (Goodwin, 2021). As Leslie (2012) highlights, the environmental education of tourists is of paramount importance for the economic benefits of local communities. Research findings indicate that residents are more likely to support tourism when they perceive economic benefits (Nunkoo & So, 2016). Furthermore, social benefits are identified when tourism serves to reinforce local identity (Stylidis et al., 2014). Rasoolimanesh et al. (2017) demonstrate that support for tourism increases in conjunction with the level of community involvement and the perception of benefits. This phenomenon is particularly evident in tourist destinations and traditional villages.

Sharpley (2014) posits that a beneficial perception of tourism is fundamental to sustainable development in developing countries. Kurek (2013) argues that developing countries are resistant to the idea of giving up mass tourism, as it represents their primary source of income.

However, Mihalic (2016) and Mohamadi et al. (2022) highlight that, despite a wealth of research, the practical implementation of sustainability initiatives continues to face significant challenges, particularly in developing regions where the necessary tools and strategies are lacking. Goodwin (2021) presents a discussion of the evolution of responsible tourism from a niche initiative to a global environmental strategy. Smith and Richards (2019) and Dodds and Butler (2010) investigated the significance of tourist involvement and consistent regulation in mitigating the adverse effects of mass tourism on the vulnerable environment.

2.1.1 Research gaps and contribution of this study

Despite extensive research on mass tourism's impact and VR's potential, gaps remain in long-term behavioural studies and applications beyond Western contexts.

This study contributes by:

- Evaluating VR's influence on responsible tourism behaviour.
- Examining its role in reducing visits to sensitive ecosystems.
- Expanding research to Jordan's Coral Reef.

By addressing these gaps, this study enhances understanding of VR as a sustainable tourism alternative, particularly in ecologically fragile areas

2.1.2 *Environmental impact of mass tourism*

In his work, Kurek (2013) identifies the transformation of tourism into a mass phenomenon in the period following the Second World War. The author posits that this was due to an increase in technology, income and the convenience of air transport. The topic of mass tourism is a source of concern for many academics and authorities. An increase in tourism has been identified as a contributing factor to the degradation of all ecosystems (Buckley, 2012). The researcher underscores that the overexploitation of natural resources by humans poses a significant threat to biodiversity and the overall health of the ecological system. Weaver and Lawton (2017) argue that coral reef ecosystems are susceptible to adverse effects.

Of particular concern are the effects of pollution, erosion and ecological disturbance. This results in an over-intensive tourist presence and the expansion of tourist infrastructure. It has been demonstrated that large-scale tourism represents a significant contributing factor to environmental change in popular tourist destinations. Bali and the Great Barrier Reef are illustrative examples of natural resource destruction (D'Hautesserre, 2015; Hughes, Kerry and Simpson, 2017; UNWTO, 2020).

Some countries are implementing precautionary measures, such as the temporary closure of Maya Bay in Thailand for the purpose of environmental regeneration. Australia has implemented a restriction on the number of divers permitted on the Great Barrier Reef (Great Barrier Reef Marine Park Authority, 2021). Similarly, tourist fees have been introduced in Venice (Seraphin, Sheeran & Pilato, 2018). The Philippine Island of Boracay has been closed by the government to address critical issues and protect nature (Reyes et al., 2018). Despite the number of tourists in summer reaching 5,000 per day, which exceeds the UNESCO limit by half (Philips, 2019), Peru has introduced changes to morning and afternoon visits.

As indicated by the Ministry of Business, Innovation & Employment (2019), since 1 July 2019, most international visitors to New Zealand have been subject to a \$100 International Visitor Conservation and Tourism Levy (IVL). In their research, Rinzin, Vermeulen & Glasbergen (2007) posit that Bhutan employs a quota system to regulate tourist numbers, levying high fees to this end. To safeguard the local flora, Iceland has temporarily closed the Fjaðrárgljúfur canyon to the public (Iceland Insider, 2023). The Spanish city of Barcelona is renowned for its numerous restrictions on tourism. The neologism 'Touristophobia', which denotes a negative perception of visitors by the local community, is frequently referenced in academic literature (Romagnoli, 2020; Martins, 2018; Tesfahuney, 2024).

2.1.3 *Virtual reality in tourism: Supporting the sustainability of coral reefs*

Loss of coral reefs endangers the well-being of millions of people and the stability of marine ecosystems. The Red Sea Reef is one of the most ecologically vulnerable in the world (Kleinhouse et al., 2020).

The utilization of innovative virtual reality (VR) technology presents a promising avenue for the safeguarding of vulnerable natural ecosystems and corals. The use of immersive technologies enables tourists to experience the beauty of nature without the need for physical presence in these locations, thereby reducing the potential for degradation (Zhang et al., 2022; Tussyadiah et al., 2018).

Virtual reality (VR) has the potential to be a powerful tool for education, fostering positive environmental attitudes and raising awareness about the importance of environmental protection. To illustrate, virtual reality simulations permit individuals to virtually 'visit' coral reefs, thereby mitigating the adverse effects of mass tourism (Stainton, 2020). Furthermore, research indicates that such technologies influence tourists' responsible attitudes towards the environment (Beck et al., 2019). The efficacy of environmental education utilizing VR technology for wetland ecosystems has been validated (Ou, Chu and Tarng, 2021).

Furthermore, the use of VR has been demonstrated to facilitate CO₂ reduction (Liu et al., 2021), the simulation of environmental (Scurati, 2021) and humanitarian risks (International Committee of the Red Cross, 2024).

The use of VR technology in the case of the Jordan coral reef provides an innovative tool for the ecological promotion of sustainable development. Digital simulations not only motivate conservation but also offer a modern alternative to traditional tourism by reducing the physical impact on fragile ecosystems. This approach promotes global environmental awareness while protecting the fragile natural resources of coral reefs.

"The problem of negative environmental impact, on the other hand, stems from the fact that the most attractive areas for tourism are also the most valuable in terms of nature (Kurek, 2013)." The use of virtual reality helps to better understand the importance of coral reefs and the threats they face. Table 2 shows the main applications of VR in coral reef conservation.

Table 2: VR technology has potential for coral reef conservation. Source: Author's work

Application of VR Technology	Explanation
Ecological education for tourists	VR enables virtual diving, educating tourists about reefs without physical visits.
Simulation of reef threats	VR illustrates the impact of pollution and overfishing, raising awareness of human actions.
Virtual tours of protected areas	Allows tourists to explore protected reefs virtually, reducing direct environmental impact.
Training for divers and researchers	Enables controlled practice, reducing accidental reef damage during real dives.
Monitoring reef health	VR visualizes reef changes in real time, aiding in faster response to threats.
Promoting reef conservation	Creates emotional connections with reefs, encouraging sustainable practices.

2.1.4 Research methodology

This study presents the methodological framework, which integrates both qualitative and quantitative approaches (Table 3).

Table 3: Methodology Overview. Source: Author's work

Element	Description
Research approach	Mixed-methods approach: combination of qualitative and quantitative techniques for a holistic analysis of attitudes toward environmental protection.
Study objectives	1. Assess the impact of VR experiences on participants' environmental awareness. 2. Investigate changes in attitudes toward responsible tourism.
Research group	527 participants from diverse demographic backgrounds, with no prior experience using VR for tourism-related purpose.
Study stages	1. Immersive Virtual Tour: Participants experienced a 360° VR tour of Jordan's Coral Reef, guided by an expert. 2. Post-experience Evaluation: Surveys and in-depth interviews were conducted to assess emotional, cognitive, and behavioural responses.
Data collection methods	1. Surveys: Pre- and post-experience questionnaires assessing participants' perceptions of VR, environmental awareness, and willingness to engage in sustainable tourism. 2. In-depth Interviews: Qualitative insights were gathered to explore emotional and reflective responses.
Data analysis techniques	1. Quantitative Analysis: Descriptive statistics, correlation analysis, regression models and Chi-square test applied to survey responses. 2. Qualitative Analysis: Thematic coding of interview data using Braun & Clarke's framework.
Triangulation of methods	Combination of survey results, interview data, and statistical analyses to enhance validity and reliability of findings.
Additional techniques	Focus Group Discussions (FGI): Conducted to capture group perspectives and shared opinions on VR's effectiveness in promoting responsible tourism.
Educational purpose of VR	VR was used as a pedagogical tool to enhance understanding of coral reef conservation, ecological threats, and the role of responsible tourism.
Study Limitations	1. Potential participant bias. 2. Limited budget and time constraints. 3. Challenges in ensuring a representative sample.
Mitigation strategies	1. Use of a diverse participant sample. 2. Implementation of online surveys to reach a broader audience. 3. Randomized or purposive sampling methods.
Survey results application	Findings contribute to understanding VR's effectiveness as an educational tool for eco-tourism and provide recommendations for tourism industry stakeholders.

It evaluates the impact of virtual reality (VR) experiences on participants' attitudes toward environmental protection and responsible tourism. The study involved an immersive 360° virtual tour of the Red Sea Coral Reef in Jordan, followed by pre- and post-experience surveys and in-depth interviews. The data analysis utilized statistical methods for quantitative results and thematic analysis Braun & Clarke, (2006) for qualitative responses. This mixed-methods approach allowed for a comprehensive examination of changes in environmental awareness and responsible tourism behavior among participants.

1.2 Case Study: The Unique Ecosystem in the Gulf of Aqaba, Jordan

As documented by UNESCO (2024), the Aqaba Marine Park (AMP) was established in 1977. The coral reefs located at the northern end of the Red Sea represent one of the most valuable marine ecosystems in Jordan. They play a pivotal role in the regional biodiversity. The high-water clarity and stable temperature facilitate the growth of climate-tolerant corals. The reef is home to more than 200 species of coral and approximately 1,200 species of fish, including a considerable number of endemic species. In addition to its invaluable ecological value, the reef provides a vital shoreline protection service. Furthermore, local communities derive income from tourism and fishing. As emphasised by Kleinhouse et al. (2022), there is an urgent need for regional collaboration in marine coral research and conservation.

The sinking of artificial reefs serves to reinforce the importance of AMR. As stated by Jordan Travel (2024), the sinking of artificial reefs serves as an effective method for the protection of coral reefs in the Red Sea. The wreck of the Lockheed C-130 Hercules aircraft is situated at a depth of between 15 and 30 metres, while the M42 Duster tank is located at a depth of between 5 and 7 metres. The vessels (Figure 2) serve as habitats for marine fauna or as points of interest for visitors (Jordanian Royal Marine Conservation Society, 2020; ASEZA, 2022).



Figure 2: Lockheed C-130 Hercules aircraft wreck and M42 Duster tank. Photos from virtual tour. Autor's work

Tourism has been identified as a contributor to problematic issues. Diving, pollution and boat anchoring are damaging coral reefs. VR could be the solution. A reef ecosystem can be experienced without harming it. The case study used VR to show the beauty of the reef in video 360. The study allowed participants to experience the reef, Aqaba Marine Park (AMP), while learning about the threat of mass tourism. This was made possible by educational components and a real-time guide. It prompts consideration of the need for environmental protection, making virtual reality a potential tool for promoting sustainable tourism development.

3. Results

Table 4: Key Statistical Indicators. Autor's work

Indicator	Description
Descriptive Statistics	Mean, median, and standard deviation were calculated for key variables. The mean scores were immersion 7.8/10 , realism 7.6/10 , and educational value 8.1/10 .
Correlation Analysis	Pearson correlation analysis revealed strong positive correlations: immersion & realism ($r = 0.72, p < 0.001$), realism & educational value ($r = 0.68, p < 0.001$), and immersion & educational value ($r = 0.74, p < 0.001$). These findings suggest that higher immersion and realism ratings are linked to greater perceived educational value.
Chi-Square Test for Independence	Examined the relationship between perceived environmental emotions and increased awareness. The test was significant ($\chi^2 = 18.5, p < 0.01$), indicating a strong association between emotional involvement and heightened awareness.
Regression Analysis	A linear regression model predicted consideration of sustainable tourism based on immersion, realism, and educational value. The model was significant ($F = 24.3, p < 0.001$), with educational value as the strongest predictor ($\beta = 0.41, p < 0.001$) .

3.1 Educational Value Distribution

The objective of this study is to assess the participants' perceptions of the virtual reality (VR) experience in terms of three key factors: immersion, realism and educational value.

1. Educational value: The responses were predominantly in the "High" (39%) and "Medium" (32%) categories, while the "Very High" (19.0%) category also demonstrated a notable presence. The responses classified as "Low" (8%) and "Very Low" (2%) were relatively infrequent (Table 4).

2. Immersion: Many participants rated the level of immersion as either "high" (39%), "medium" (23%), or "very high" (21%). A smaller proportion indicated that the level of immersion was low (12%) or very low (5%) (Table, 5)

2. Realism: Most participants rated realism as either "High" (40%) or "Medium" (29%), with a smaller proportion indicating "Very High" (20%). "Low" (7%) and "Very Low" (4%) ratings were rare (Table, 5).

The high ratings of immersion and realism influenced the perception of VR's educational value. The results confirm that VR is an effective tool to support environmental education and awareness building.

Table 5: Educational Value Distribution. Source: Autor's work

Variable	n (%)
Very high	100 (19)
Medium	169 (32)
High	206 (39)
Very low	11(2)
Low	42 (8)

Table 6: Immersion Rating Distribution and Realism Rating Distribution. Source: Autor's work

Variable	Immersion n (%)	Realism n (%)
Very high	111(21)	105 (20)
Medium	121(23)	153 (29)
High	206 (39)	211(40)
Very low	63 (12)	21(4)
Low	26 (5)	37(7)

3.2 Increased Awareness Distribution

Assessing emotional engagement and increased environmental awareness through the VR experience. **1 Awareness has increased.** A similar pattern of responses was seen: 41% "rather yes", 28% "definitely yes". The neutral response was as follows: 19% said yes, 8% said no and 4% said not. The VR experience engaged participants emotionally and raised awareness of environmental issues (Table 6).

2. Emotional Reactions: Most participants reported positive emotional responses, with 40% indicating a "Rather yes" and 23% a "Definitely yes" response. Neutral responses, including "Difficult to say," accounted for 21%, while «Rather not"(11%) and "Definitely not"(5%) were infrequent (Table 6).

Table 7: Increased Awareness and Emotional Reactions (Environmental distribution). Source: Autor`s work

Variable	Increased Awareness n (%)	Emotional Reactions n (%)
Somewhat Agree	216 (41)	211(40)
Strongly Agree	148 (28)	121(23)
Neutral Response	100 (19)	111(21)
Somewhat Disagree	42(8)	58(11)
Strongly Disagree	21(4)	26(5)

3.3 Sustainable Tourism Consideration and VR as an Alternative to Physical Travel

Table 8: Sustainable Tourism Consideration and VR as an Alternative to Physical Travel. Source: Autor`s work

Variable	Sustainable Tourism Consideration n (%)	VR as an Alternative to Physical Travel n (%)
Somewhat Agree	227 (43)	232 (44)
Strongly Agree	158 (30)	153(29)
Neutral Response	79 (15)	79(15)
Somewhat Disagree	42 (8)	42(8)
Strongly Disagree	21(4)	21(4)

This study examines how virtual reality (VR) affects support for sustainable tourism and perceptions of VR as an alternative to physical travel.

1.Regarding sustainable tourism, the majority (43%) of respondents indicated support, while 30% expressed a definite support. Additionally, 15% of respondents were undecided, while only 8% and 4% indicated opposition. These findings are illustrated in Table, 7.

2. VR is the preferred alternative, with 44% saying 'Rather yes and 29% saying 'Definitely yes'. The neutral responses accounted for 15%, while 'Rather not' (8%) and 'Definitely not' (4%) were less common. The VR experience resulted in participants supporting sustainable tourism and considering VR as a viable alternative to physical travel (Table, 7).

4. Discussion

The study provides a detailed overview of the groundbreaking potential of virtual reality (VR) as an effective tool for the development of sustainable tourism. The findings indicated that participants formed powerful emotional associations with the issues presented in the virtual reality environment. Furthermore, respondents indicated an enhanced awareness of environmentally conscious practices. The educational benefits of immersive realism were highly valued. This serves to validate its capacity to positively influence attitudes towards environmental conservation, including those pertaining to coral reefs. It is also noteworthy that the use of VR does not result in any physical impact on the sites in question. Furthermore, it fosters a sense of responsibility and encourages sustainable tourist behaviour.

4.1 Challenges and Potential Limits of Virtual Reality

VR technology offers many advantages for sustainable tourism, though it also presents challenges.

1.Technological constraints: The creation of high-quality VR experiences necessitates the utilisation of sophisticated hardware and software, which often comes at a considerable financial expense.

2. Financial constraints: The creation of realistic and interactive VR content for selected ecosystems necessitates a substantial financial, operational and logistical investment.

3. User accessibility: There is a paucity of access to VR technology in many regions. This has an impact on the global adaptability of the technology.

4.2 Tourism Industry and Policy Implications

1. Industry applications: Tourism organizations should implement VR to increase tourist interest and reduce environmental impact.

2. Policy recommendations: Policy makers should promote VR in tourism strategies, especially in sensitive areas, and support small operators implementing the technology.

3. Educational campaigns: VR can increase the effectiveness of environmental campaigns by educating travellers about environmentally friendly behaviour and heritage preservation.

By using VR, the tourism sector can promote sustainable development and conservation of natural and cultural resources for future generations.

5. Conclusion

The findings of this study indicate that virtual reality has the potential to revolutionise the way in which sustainable tourism is promoted. The ability of VR to offer immersive and emotionally engaging experiences has the potential to educate participants about environmental issues in a way that influences their attitudes towards adopting responsible tourism practices. The results of the research demonstrate that the use of VR can effectively minimise the physical impact of tourism on vulnerable ecosystems such as coral reefs, while promoting higher levels of awareness and behavioural changes that support sustainability. These findings highlight the potential of VR as a key tool for the tourism industry in navigating the challenges posed by mass tourism. Despite the promising results, this research acknowledges several limitations. The accessibility and cost of VR technology remain substantial barriers, particularly in underdeveloped regions. Furthermore, while the study effectively examined the emotional impact and attitudes, further investigation is necessary to ascertain the long-term impact of VR experiences on actual behaviour. Future research could examine the scalability of VR solutions, the integration of advanced interactivity, and the development of VR content tailored to different cultural and environmental contexts.

References

- ASEZA (2022) *Aqaba Marine Park Development and Artificial Reefs*. Aqaba: Aqaba Special Economic Zone Authority. Available at: https://aseza.jo/EN/Pages/Aqaba_Marine_Reserve (Accessed: 16 July 2024).
- Beck, A., Rainoldi, M. & Egger, R. (2019) 'Virtual reality in tourism: A state-of-the-art review', *Tourism Review*, 74(3), pp. 586-612. doi: 10.1108/TR-03-2017-0049.
- Bramwell, B., Lane, B., McCabe, S., Mosedale, J. and Scarles, C., (2008). 'Research perspectives on responsible tourism'. *Journal of Sustainable Tourism*, 16(3), pp.253-257. <https://doi.org/10.1080/09669580802208201>
- Braun, V., Clarke, V. (2006) 'Using thematic analysis in psychology'. *Qualitative Research in Psychology*, 3(2), 77-101. doi: 10.1191/1478088706qp063oa
- Buckley, R. (2012) 'Sustainable tourism: Research and reality', *Annals of Tourism Research*, 39(2), pp. 528-546. doi: 10.1016/j.annals.2012.02.003
- Butler, R. (1980) 'The concept of a tourism area cycle of evolution: Implications for management of resources', *The Canadian Geographer*, 24(1), pp. 5-12. doi: 10.1111/j.1541-0064.1980.tb00970.x.
- D'Hauterter, A.M. (2015) 'Affect theory and the attractivity of destinations', *Annals of Tourism Research*, 55, pp. 77-89. doi: 10.1016/j.annals.2015.09.001.
- Dodds, R. & Butler, R.W. (2010) 'Barriers to implementing sustainable tourism policy in mass tourism destinations', *Tourism Review*, 65(4), pp. 37-47. doi: 10.1108/16605371011093807. Dodds, R. & Butler, R.W. (2010) 'Barriers to implementing sustainable tourism policy in mass tourism destinations', *Tourism Review*, 65(4), pp. 37-47. doi: 10.1108/16605371011093807.
- Dudek, T. and Kuziak, J. (2017) 'The threshold of the negative impact of tourism and recreation on the forest ecosystem—a case study of the Elks Forest District'.
- Egresi, I. (2016) 'Tourism and sustainability in Turkey: Negative impact of mass tourism development', in Egresi, I. (ed.) *Alternative Tourism in Turkey*. GeoJournal Library, vol. 121. Cham: Springer, pp. 49-74. doi: 10.1007/978-3-319-47537-0_3.
- Fatma, A. and Bhatt, V. (2023) '"Reality" influences "Actuality": The role of augmented and virtual reality in the intention of ecotourism travel', *Journal of Ecotourism*, 23(3), pp. 436-453. doi: 10.1080/14724049.2023.2273751.

- Geng, J. (2022) 'Online virtual tourism platform based on VR technology', *Highlights in Science, Engineering and Technology*, 1, pp. 107-114. doi: 10.54097/hset.v1i.435.
- Goodwin, H. (2021) *Responsible tourism: Using tourism for sustainable development*. Oxford: Goodfellow Publishers. doi: 10.23912/9781911396673-4738.
- Gössling, S. (2002) 'Global environmental consequences of tourism', *Global Environmental Change*, 12(4), pp. 283-302. doi: 10.1016/S0959-3780(02)00044-4.
- Great Barrier Reef Marine Park Authority (2021) Available at: <https://www2.gbrmpa.gov.au/> (Accessed: 07 July 2024).
- Guttentag, D.A. (2010) 'Virtual reality: Applications and implications for tourism', *Tourism Management*, 31(5), pp. 637-651. doi: 10.1016/j.tourman.2009.07.003.
- Hughes, T., Barnes, M., Bellwood, D. et al. (2017) 'Coral reefs in the Anthropocene', *Nature*, 546, pp. 82-90. doi: 10.1038/nature22901.
- Iceland Insider (n.d.) 'Walking paths at Fjaðrárgljúfur Canyon closed to protect vegetation from damage'. Available at: <https://icelandinsider.is/uncategorized/walking-paths-at-fjadrargljufur-canyon-closed-to-protect-vegetation-from-damage/> (Accessed: 02 November 2024).
- International Committee of the Red Cross (ICRC) (2024) *Virtual reality*. Available at: <https://virtual-reality.icrc.org/> (Accessed: 26 October 2024).
- Jordan Travel (2024) 'C-130 Hercules Dive Site Aqaba'. Available at: <https://jordan-travel.com/c-130-hercules-dive-site-aqaba/> (Accessed: 1 October 2024).
- Jordanian Royal Marine Conservation Society (2020) *Annual Report on Aqaba Marine Reserve*. Amman: JREDS. Available at: <http://www.jreds.org/en-us/> (Accessed: 4 July 2024).
- Kask, S. (2018) 'Virtual reality in support of sustainable tourism: Experiences from Eastern Europe' (Doctoral dissertation, Eesti Maaülikool). pp. 9-89. Available at: Kask_Sergei_DO2018.pdf (Accessed: 13 August 2023).
- Kleinhaus, K., Al-Sawalmih, A., Barshis, D.J., Genin, A., Grace, L.N., Hoegh-Guldberg, O., Loya, Y., Meibom, A., Osman, E.O., Ruch, J.D. and Shaked, Y. (2020) 'Science, diplomacy, and the Red Sea's unique coral reef: It's time for action', *Frontiers in Marine Science*, 7, p. 90. doi: 10.3389/fmars.2020.00090.
- Kurek, W. (2013) 'Tourism and the Environment: Contemporary Research Issues'. Available at: <https://u.edu.pl> (Accessed: 14 July 2024).
- Lee, J.W. and Syah, A.M. (2018) 'Economic and environmental impacts of mass tourism on regional tourism destinations in Indonesia', *Journal of Asian Finance, Economics and Business*, 5(3), pp. 31-41. doi: 10.13106/jafeb.2018.vol5.no3.31. Available at: <https://ssrn.com/abstract=3250133>.
- Leslie, D. ed. (2012) 'Responsible tourism: Concepts, theory and practice'. Wallingford: CABI.
- Martins, M. (2018) 'Tourism planning and tourismphobia: An analysis of the strategic tourism plan of Barcelona 2010-2015', *Journal of Tourism, Heritage & Services Marketing (JTHSM)*, 4(1), pp. 3-7. doi: 10.5281/zenodo.1247519.
- Mihalic, T. (2016) 'Sustainable-responsible tourism discourse – Towards "responsustable" tourism', *Journal of Cleaner Production*, 111, pp. 461-470. doi: 10.1016/j.jclepro.2014.12.062.
- Ministry of Business, Innovation & Employment (2019) *International Visitor Conservation and Tourism Levy*. Available at: <https://www.mbie.govt.nz> (Accessed: 25 July 2024).
- Mohamadi, S., Abbasi, A., Ranaei Kordshouli, H.A. and Askarifar, K., (2022). 'Conceptualizing sustainable-responsible tourism indicators: An interpretive structural modeling approach'. *Environment, Development and Sustainability*, 24(1), pp.399-425. <https://doi.org/10.1007/s10668-021-01442-9>
- Nunkoo, R. and So, K.K.F. (2016) 'Residents' support for tourism: Testing alternative structural models', *Journal of Travel Research*, 55(7), pp. 847-861. doi: 10.1177/0047287515592972.
- Ólafsdóttir, R. and Runnström, M.C. (2013) 'Assessing hiking trails condition in two popular tourist destinations in the Icelandic highlands', *Journal of Outdoor Recreation and Tourism*, 3, pp. 57-67. doi: 10.1016/j.jort.2013.09.004.
- Ou, K.L., Chu, S.T. and Tarng, W. (2021) 'Development of a virtual wetland ecological system using VR 360 panoramic technology for environmental education', *Land*, 10(8), p. 829. doi: 10.3390/land10080829.
- Phillips, T. (2019) 'Machu Picchu airport: Unesco demands answers from Peru government', *The Guardian*, 9 August. Available at: <https://www.theguardian.com/travel/2019/aug/09/machu-picchu-airport-unesco-demands-answers-from-peru-government> (Accessed: 17 October 2024).
- Prasetyo, H. (2022) 'Trends in sustainable tourism research', *Pringgitan*, 3(2), pp. 34-45. doi: 10.47256/prg.v3i2.170.
- Protect Earth Foundation (n.d.) 'Preserving Machu Picchu: Safeguarding history'. Available at: <https://protectearth.foundation/preserving-machu-picchu-safeguarding-history/> (Accessed: 04 September 2024).
- Rasoolimanesh, S.M., Ringle, C.M., Jaafar, M. and Ramayah, T. (2017) 'Urban vs. rural destinations: Residents' perceptions, community participation and support for tourism development', *Tourism Management*, 60, pp. 147-158. doi: 10.1016/j.tourman.2016.11.019.
- Reyes, C.M., Albert, J.R.G., Quimba, F.M.A., Ortiz, M.K.P. and Asis, R.D. (2018) 'The Boracay closure: Socioeconomic consequences and resilience management' (No. 2018-37). PIDS Discussion Paper Series. Available at: <https://www.pids.gov.ph/publications> (Accessed: 10 July 2024).
- Rinzin, C., Vermeulen, W.J. and Glasbergen, P. (2007) 'Ecotourism as a mechanism for sustainable development: The case of Bhutan', *Environmental Sciences*, 4(2), pp. 109-125. doi: 10.1080/15693430701365420.
- Romagnoli, M. (2020) 'Dying of success: Ethnographic insights of touristophobia in Barcelona'. *Acta Geographica Lovaniensia*, KU Leuven: Belgium, pp. 229-238.

- Ruhanen, L., Weiler, B., Moyle, B. and McLennan, C. (2015) 'Trends in sustainable tourism research', *Journal of Sustainable Tourism*, 23(4), pp. 517–535. doi: 10.1080/09669582.2014.978790.
- Scurati, G.W., Bertoni, M., Graziosi, S. and Ferrise, F. (2021) 'Exploring the use of virtual reality to support environmentally sustainable behavior: A framework to design experiences', *Sustainability*, 13(2), p. 943. doi: 10.3390/su13020943.
- Seraphin, H., Sheeran, P. and Pilato, M. (2018) 'Over-tourism and the fall of Venice as a destination', *Journal of Destination Marketing & Management*, 9, pp. 374–376. doi: 10.1016/j.jdmm.2018.01.011.
- Sharpley, R. (2014) 'Host perceptions of tourism: A review of the research', *Tourism Management*, 42, pp. 37–49. doi: 10.1016/j.tourman.2013.10.007.51.
- Smith, M. and Richards, G. (2019) *The Routledge Handbook of Cultural Tourism*. Abingdon: Routledge. doi: 10.4324/9781315179751.
- Stainton, H. (2020) 'The transformative potential of virtual reality for cultural tourism', *Journal of Heritage Tourism*, 15(5), pp. 477–491. doi: 10.1080/1743873X.2020.1751266.
- Stylidis, D., Biran, A., Sit, J. and Szivas, E.M. (2014) 'Residents' support for tourism development: The role of residents' place image and perceived tourism impacts', *Tourism Management*, 45, pp. 260–274. doi: 10.1016/j.tourman.2014.05.006.
- Tesfahuney, M. and Ek, R. (2024) 'The Tourismocene: Barcelona, overtourism, and the spatial futures of the polis', in Eaves, L.E., Nast, H.J., and Papadopoulos, A.G. (eds) *Spatial Futures*. Singapore: Palgrave Macmillan, pp. 229–238. doi: 10.1007/978-981-99-9761-9_11.
- Tussyadiah, I.P., Wang, D., Jung, T.H. and Tom Dieck, M.C. (2018) 'Virtual reality, presence, and attitude change: Empirical evidence from tourism', *Tourism Management*, 66, pp. 140–154. doi: 10.1016/j.tourman.2017.12.003.
- UNESCO (2024) *The Aqaba Marine Reserve (AMR)*. Available at: <https://whc.unesco.org/en/tentativelists/6630/> (Accessed: 25 August 2024).
- UNWTO (2020) *Tourism and COVID-19: Unprecedented Economic Impacts*. Available at: <https://www.unwto.org/tourism-and-covid-19-unprecedented-economic-impacts> (Accessed: 1 November 2024).
- UNWTO (2024) *UN Tourism World Tourism Barometer: Global Tourism Statistics*. Available at: <https://www.unwto.org/un-tourism-world-tourism-barometer-data> (Accessed: 13 October 2024).
- Weaver, D.B. and Lawton, L.J. (2017) *Tourism Management*. 6th edn. Hoboken: Wiley. doi: 10.1002/9781119450749.
- World Tourism Organization (UNWTO) (2020) *International Tourism Highlights, 2020 Edition*. Available at: <https://www.e-unwto.org/doi/book/10.18111/9789284422457> (Accessed: 04 September 2024).
- World Tourism Organization (UNWTO) (2020) *Tourism and sustainable development goals – Good practices in the Americas*. Available at: <https://doi.org/10.18111/9789284422068>.
- Zhang, S.N., Li, Y.Q., Ruan, W.Q. and Liu, C.H. (2022) 'Would you enjoy virtual travel? The characteristics and causes of virtual tourists' sentiment under the influence of the COVID-19 pandemic', *Tourism Management*, 88, p. 104429. doi: 10.1016/j.tourman.2021.104429. Available at: <https://doi.org/10.1016/j.tourman.2021.104429> (Accessed: 24 August 2024).

Factors Influencing Vietnamese Consumers' Decisions Regarding Green Hotels

Thanh Nga Ha, Phi Hung Truong and Pham Minh Thu Nguyen

Tomas Bata University in Zlin, Czech Republic, Faculty of Management and Economics, Czech Republic

tha@utb.cz

ptruong@utb.cz

thuminhhcm@gmail.com

Abstract: Environmental issues remain a central concern in modern society, especially because of the rapid expansion of the tourism industry post-Covid, leading to increased pollution levels. The concept related to green tourism and hospitality emerged to satisfy consumer expectations in utilizing services while maximizing environmental conservation. Despite plenty of studies related to investigation factors affect green related products and services in hospitality industry. There is an insufficiency of comprehensive examination of client attitudes and behavior intention regarding green hotels, especially inside the Vietnamese market. This study seeks to examine the diverse aspects influencing customers' decision-making process toward green hotels. A quantitative approach was implemented to gather data from individuals who either sought or had previously used hotels when traveling in Viet Nam. A total of 269 legitimate responses were acquired. The study subsequently utilized Structural Equation Modelling (SEM) to analyze the proposed hypotheses. The findings confirm significant aspects that influence customers' decision-making process towards environmentally friendly options.

Keywords: Green hotels, Green visit intention, Cognitive factors, Social factors, Green tourism

1. Introduction

The growing demand for sustainable tourism has significantly reshaped the hospitality industry, with environmentally conscious practices becoming a cornerstone of consumer expectations. This research paper explores the multifaceted factors influencing customer choices regarding green hotels, focusing specifically on Vietnam's evolving hospitality market. By addressing the gap in understanding consumer perceptions and behaviors toward eco-friendly lodging, the study aims to provide valuable insights that can enhance sustainable tourism practices and promote environmental stewardship.

The hospitality industry, recognized for its significant environmental footprint, has been under increasing scrutiny for its contribution to water contamination, greenhouse gas emissions, and waste generation. In response, many hotels globally have adopted green practices, such as energy conservation, waste reduction, and eco-friendly certifications. Despite these efforts, as rapidly developing market economy, Vietnam faces challenges in implementing and maintaining consistent environmental standards within its hospitality sector. While customers globally exhibit a growing preference for sustainable travel, little is known about the specific motivations, barriers, and demographic influences that shape the preferences of Vietnamese consumers toward green hotels.

This research aims to fill this critical knowledge gap by examining the key determinants that drive customer intentions toward environmentally friendly hotels. Leveraging theories such as Ajzen's Theory of Planned Behavior and the Engel-Kollat-Blackwell Model of Consumer Behavior, the study delves into socio-demographic and psychographic factors influencing customer attitudes and decision-making processes. Additionally, the research highlights the challenges and opportunities for hotels in Vietnam to align their operations with customer expectations while fostering environmental conservation.

This research contributes to the scholarly discourse on sustainability, by seeking to inform hoteliers, policymakers, and industry stakeholders about effective strategies to enhance green hospitality practices. Ultimately, it underscores the role of customer-centric sustainability initiatives in fostering a more environmentally responsible tourism industry and ensuring long-term economic growth.

2. Literature Review

Theoretical Framework and Research Gap

The Theory of Planned Behavior (TPB), an extension of the Theory of Reasoned Action (Fishbein & Ajzen, 1975), explains intentional behavior based on attitude, subjective norms, and perceived behavioral control (Ajzen, 1985). It is particularly effective for predicting sustainable behaviors, such as visiting green hotels (Han, 2015;

Kim & Han, 2010). Studies have expanded the TPB by incorporating variables like moral obligation and environmental concern to better capture green consumer behavior (Chang et al., 2014). Behavioral intention, influenced by perceived control, plays a crucial role in shaping actual behavior (Ajzen, 1991).

Consumer Behavior Theory complements TPB by focusing on psychological factors (e.g., motivation), individual traits (e.g., lifestyle), and societal influences (e.g., family), which collectively shape purchasing decisions (Engel et al., 1995). These theories together provide a strong framework for understanding consumer intentions and behavior in environmentally friendly contexts, such as green hotel visits.

2.1 Hypotheses Development

Green Perceived Value (GPV)

Green perceived value refers to the benefits customers associate with environmentally sustainable products or services (Chen & Chang, 2012). Consumers are more likely to engage in eco-friendly actions when they perceive higher value in green solutions (Kim & Choi, 2017). Thus, customers who recognize tangible environmental benefits in green hotels, such as energy efficiency and waste reduction, are more inclined to visit them.

H1: Green Perceived Value positively influences Intention to visit Green Hotels.

Green Perceived Quality (GPQ)

GPQ represents consumers' assessment of the environmental quality of green hotels (Chen & Chang, 2012). Higher perceived quality, reflecting strong sustainability practices, enhances consumer purchase intentions (Wu & Chen, 2014). Therefore, consumers who perceive green hotels as delivering superior eco-friendly quality are more likely to visit them.

H2: Green Perceived Quality positively influences Intention to visit Green Hotels.

Green Perceived Risk (GPR)

GPR is the perceived uncertainty or potential negative consequences of choosing eco-friendly products (Lee & Shin, 2010). High perceived risks, such as doubts about environmental claims or facility quality, discourage eco-friendly choices (Wu et al., 2015).

H3: Green Perceived Risk negatively influences Intention to visit Green Hotels.

Perceived Behavioral Control (PBC)

PBC reflects an individual's confidence in their ability to perform a behavior (Ajzen, 1991). Consumers with greater perceived control over accessing and engaging with green hotels are more likely to visit them (Tan et al., 2017).

H4: Perceived Behavioral Control positively influences Intention to visit Green Hotels.

Perceived Consumer Effectiveness (PCE)

PCE refers to individuals' belief in their ability to contribute to environmental preservation through consumption decisions (Moisander & Pesonen, 2002). Consumers with higher PCE are more likely to engage in sustainable behaviors, including choosing green hotels (Vermeir & Verbeke, 2008).

H5: Perceived Consumer Effectiveness positively influences Intention to visit Green Hotels.

Environmental Knowledge (EK)

EK measures consumers' understanding of environmental issues and the impacts of their actions (Kollmuss & Agyeman, 2002). Higher environmental knowledge enhances eco-friendly decision-making and increases the likelihood of visiting green hotels (Wang et al., 2018).

H6: Environmental Knowledge positively influences Intention to visit Green Hotels.

Subjective Norm (SN)

Subjective norms capture the influence of social pressure or approval from significant others (Ajzen, 1991). Positive social influence from peers or family enhances the intention to visit eco-friendly hotels (Han et al., 2010).

H7: Subjective Norm positively influences Intention to visit Green Hotels.

Collectivism (COL)

Collectivism emphasizes prioritizing group well-being over individual interests (Triandis, 1995). Individuals with collectivist tendencies are more likely to choose green hotels as a means of contributing to societal welfare (Schultz et al., 2005).

H8: Collectivism positively influences Intention to visit Green Hotels.

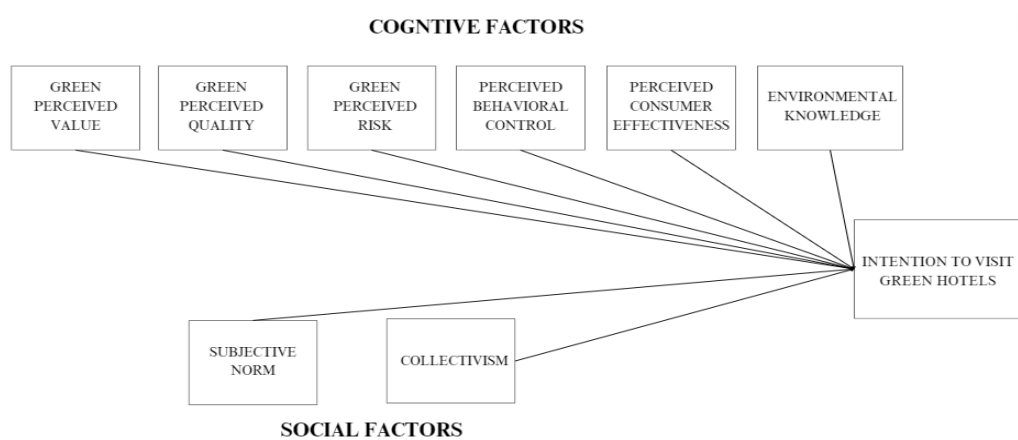


Figure 1: Theoretical Framework of Cognitive Factors and Social Factors on Intention to visit green hotels

This framework provides a comprehensive model for exploring green hotel visitation intentions and contributes to the broader understanding of sustainable consumer behavior.

Research Gap

While TPB-based studies have explored green behaviors, limited research focuses on consumer attitudes in Vietnam. This study fills this gap by analyzing consumer intentions towards green hotels within a Vietnamese cultural and market context.

3. Methodology

3.1 Overview

This study employs a quantitative approach grounded in the Theory of Planned Behavior and Theory of Consumer Behavior to explore factors influencing customers' intention to visit environmentally friendly hotels. The methodology incorporates a survey-based design, using structured questionnaires to collect data, which is analyzed using Partial Least Squares Structural Equation Modeling (PLS-SEM). This approach is particularly suited for examining complex frameworks and testing hypotheses derived from extensive literature.

3.2 Research Design

The research adopts a positive paradigm, emphasizing hypothesis testing and the validation of causal relationships through deductive reasoning. Quantitative methods were chosen for their ability to identify patterns and explain variable relationships using statistical evidence. Surveys were employed as the primary method for data collection due to their efficiency in gathering information from large populations. By enabling interaction with diverse participants and addressing multiple variables simultaneously, the survey methodology supports the study's objective of testing relationships within the conceptual framework.

3.3 Research Process

The research process began by identifying the problem and defining objectives based on a thorough review of the market environment and prior studies. A conceptual framework was then developed, outlining the hypothesized relationships between variables. Data collection involved creating a structured survey questionnaire, which was distributed online using social media platforms. The data collected were analyzed using SmartPLS 4.0 software, with findings refined and interpreted in the final stage. The systematic approach ensures a structured progression from problem identification to statistical validation of the hypotheses.

3.4 Sampling and Data Collection

The target population includes Vietnamese consumers in Ho Chi Minh City who have used or plan to use hotel services. A non-probability convenience sampling method was used due to resource and time constraints,

allowing the inclusion of participants who were accessible and aligned with the study's objectives. Screening questions ensured participants' relevance, filtering out those with no prior or intended experience with hotels. A total of 269 valid responses were collected, exceeding the minimum sample size of 80 required for SEM analysis, as determined by the '10-times rule' (Hair et al., 2022). Data collection was conducted through online surveys shared across social media platforms, with questions translated into Vietnamese to enhance accessibility.

3.5 Questionnaire Design

The survey instrument consisted of two key sections. The first section assessed the primary variables in the research framework, including constructions such as GPV, GPQ, GPR, PBC, PCE, EK, SN, COL, and IN, with measurement items adapted from prior studies (e.g., Han et al., 2010; Chen & Chang, 2012). These items were rated on a five-point Likert scale ranging from "strongly disagree" to "strongly agree." The second section collected demographic information such as gender, age, education level, and work experience. This dual-structured design allowed for a comprehensive analysis of both the research variables and participant characteristics.

3.6 Data Analysis

The data were analyzed using SPSS 26.0 and SmartPLS 4.0, with the latter chosen for its capacity to handle complex structural models and both reflective and formative constructs. The analysis followed a two-step process. First, the measurement model was evaluated for reliability and validity, using Cronbach's Alpha, composite reliability (CR), and Average Variance Extracted (AVE) to ensure internal consistency and construct validity. Next, the structural model was assessed to validate hypotheses, employing R^2 values to measure explanatory power, path coefficients to evaluate relationships, and Q^2 values to test predictive relevance. Effect sizes (f^2) were calculated to determine the impact of independent variables, while the Variance Inflation Factor (VIF) ensured that multicollinearity was not a concern.

4. Findings and Discussion

Respondent Demographics

Out of 300 surveys distributed, 269 valid responses were collected, yielding an 89.7% response rate. The sample displayed a gender imbalance, with females representing 73.2% and males comprising 26.4% of the respondents. The majority (83.3%) were aged between 19 and 25 years, followed by 7.1% aged 26-32, 5.2% aged above 39, and smaller proportions of respondents below 18 (2.6%) or aged 33-39 (1.9%). Educationally, 90.3% of respondents attended college or university, while 7.1% had a high school education or lower, and the remainder pursued postgraduate studies. Most participants (79.6%) were students, while 13.0% were office workers, with businesspeople and individuals in other professions making up 3.7% each. Income levels showed that 68% of respondents earned less than 5 million VND monthly, with 34.2% earning below 3 million and 33.8% earning 3-5 million. Higher-income groups (5-10 million and 10-20 million VND) accounted for 17.5% and 10.8%, respectively, while only 3.7% earned above 20 million VND. These demographics reflect a sample skewed toward younger, highly educated individuals with relatively low income, which should be considered when interpreting the results.

Table 1: Respondents Demographic

Demographic Factor		Frequency	Percentage (%)
Gender	Male	71	26.4
	Female	197	73.2
Age	<18 years old	7	2.6
	19-25 years old	224	83.3
	26-32 years old	19	7.1
	33-39 years old	5	1.9
	>39 years old	14	5.2
Educational background	High school or under	19	7.1
	College or University	243	90.3
	Master or Higher	7	2.6
Occupation	Student	214	79.6
	Office worker	35	13
	Businessmen	10	3.7
	Others	19	3.7
Income	<3 mil	92	34.2
	3-<5 mil	91	33.8
	5-<10 mil	47	17.5
	10-<20 mil	29	10.8
	>20 mil	10	3.7

Measurement Model Evaluation

The reliability and validity of the measurement model were assessed through factor loadings, composite reliability (CR), and Average Variance Extracted (AVE) following guidelines by Hair et al. (2022). Factor loadings revealed that most constructions met the threshold of 0.7, with five items removed due to insufficient values. Specifically, two items from Green Perceived Risk, one from Environmental Knowledge, and two from Collectivism were excluded, leaving 30 items for the final model.

Table 2: Outer Loadings

Constructs	Items	Outer Loadings			
Green Perceived value	GPV1	0.750	Perceived Behavioral Control	PBC1	0.876
	GPV2	0.750		PBC2	0.827
	GPV3	0.772		PBC3	0.749
	GPV4	0.765	Perceived Consumer Effectiveness	PCE1	0.849
	GPV5	0.735		PCE2	0.860
Green Perceived Quality	GPQ1	0.879		PCE3	0.761
	GPQ2	0.828	Environmental Knowledge	EK2	0.816
	GPQ3	0.807		EK3	0.821
	GPQ4	0.825		EK4	0.733
	GPQ5	0.853			
Green Perceived Risk	GPR1	0.843	Subjective norm	SN1	0.817
	GPR2	0.799		SN2	0.952
	GPR4	0.822		SN3	0.933
			Collectivism	COL1	0.872
				COL2	0.925
Intention to visit Green hotels	IN1				0.851
	IN2				0.821
	IN3				0.801

(Source: Author, 2024)

Composite reliability values for all construct exceeded the threshold of 0.7, confirming internal consistency reliability. The Cronbach's Alpha values were also within acceptable ranges, further supporting the consistency of the measurement model. Notably, CR values did not exceed 0.90, preventing redundancy and preserving the content validity of the constructs. AVE values for all constructs ranged from 0.569 to 0.815, exceeding the minimum threshold of 0.5, thus confirming convergent validity. These results indicate that the constructs reliably measured their intended variables and explained over 50% of the variance in their indicators.

Table 3: Results of Internal Consistency

	Cronbach's Alpha	Composite Reliability
GPV	0.811	0.869
GPQ	0.897	0.922
GPR	0.760	0.862
PBC	0.761	0.859
PCE	0.763	0.864
EK	0.707	0.833
SN	0.904	0.929
COL	0.766	0.894
IN	0.764	0.864

(Source: Author, 2024)

Discriminant validity was evaluated using the Fornell-Larcker criterion, cross-loadings, and Heterotrait-Monotrait Ratio (HTMT). The Fornell-Larcker results showed that the square root of each construct's AVE was greater than its correlations with other constructs, indicating clear differentiation between constructs. Cross-loadings further confirmed that indicators loaded higher on their assigned constructs than on others. HTMT values, ranging from 0.056 to 0.714, were below the 0.90 threshold, providing additional evidence of discriminant validity.

Structural Model Assessment

The structural model was assessed to evaluate its predictive power and the relationships between variables. The R^2 value for the dependent variable, Intention to Visit Green Hotels, was 0.600, indicating that the independent variables collectively explained 60% of the variance in intention. This value signifies a substantial level of explanatory power, as it falls within the range of 0.50 to 0.75, as suggested by Hair et al. (2022). The Q^2 value of 0.577 confirmed the model's predictive relevance, demonstrating that the framework provides meaningful insights into the dependent variable.

Table 4: Outcome of the f^2 value sizes

Predictor Construct	Value	Level of effect
GPV → IN	0.179	Medium
GPQ → IN	0.132	Small
GPR → IN	0.049	Small
PBC → IN	0.085	Small
PCE → IN	0.058	Small
EK → IN	0.170	Medium
SN → IN	0.016	None
COL → IN	0.000	None

(Source: Author, 2024)

Effect sizes (f^2) were calculated to evaluate the strength of each independent variable's influence. Green Perceived Value and Environmental Knowledge demonstrated moderate effects on the intention to visit green hotels, while Green Perceived Quality, Green Perceived Risk, Perceived Behavioral Control, and Perceived Consumer Effectiveness showed small but significant effects. Conversely, Subjective Norm and Collectivism had negligible effects, indicating their limited influence in this context.

Hypothesis Testing

Table 5: Hypothesis Testing

Hypothesis	Relationship	Path Coefficients	T-Values	P-Values	Decision
H1	GPV → IN	0.287	5.630**	0.000	Supported
H2	GPQ → IN	0.241	5.679**	0.000	Supported
H3	GPR → IN	-0.141	3.650**	0.000	Supported
H4	PBC → IN	0.195	4.494**	0.000	Supported
H5	PCE → IN	0.165	3.621**	0.000	Supported
H6	EK → IN	0.289	5.809**	0.000	Supported
H7	SN → IN	0.094	1.731	0.899	Not Supported

Hypotheses were tested using the nonparametric bootstrap method with 2,000 subsamples, ensuring robust statistical results without assuming normal data distribution. The results revealed that:

H1 (Green Perceived Value): Supported, with a significant positive effect on intention.

H2 (Green Perceived Quality): Supported, indicating that perceived quality positively impacts intention.

H3 (Green Perceived Risk): Supported, with a significant negative effect on intention.

H4 (Perceived Behavioral Control): Supported, showing a strong positive influence on intention.

H5 (Perceived Consumer Effectiveness): Supported, with a positive effect.

H6 (Environmental Knowledge): Supported, demonstrating a significant positive effect.

H7 (Subjective Norm): Not supported, indicating no significant influence.

H8 (Collectivism): Not supported, suggesting a negligible effect.

These results confirm that constructs like Green Perceived Value, Green Perceived Quality, and Environmental Knowledge are key drivers of intention to visit green hotels. Conversely, the lack of support for Subjective Norm and Collectivism highlights their limited role in this context.

5. Discussion

The findings of this study provide significant insights into the factors influencing consumers' intention to visit green hotels, with several hypotheses supported by the results. Green Perceived Value was found to positively impact visit intention, aligning with previous research (Kim & Choi, 2017). Consumers who recognize the environmental and personal benefits of green hotels, such as energy efficiency and waste reduction, are more likely to choose these accommodations. Similarly, Green Perceived Quality was positively associated with intention, though its effect was less pronounced. While some customers prioritize the environmental initiatives of hotels, many still value traditional factors like comfort, convenience, and service quality more highly.

Green Perceived Risk demonstrated a negative but moderate influence on visit intention. Concerns about the reliability of green practices, though present, are mitigated by certifications, positive word-of-mouth, and government endorsements. Perceived Behavioral Control also positively influenced intention, as consumers with confidence in their ability to locate, book, and afford green hotels were more likely to express intent to

stay. However, the limited availability of green hotels and potential booking inconveniences could reduce the overall impact of this factor.

Perceived Consumer Effectiveness was shown to positively affect visit intention, reflecting consumers' belief that their individual actions contribute to environmental sustainability. However, this effect was tempered by the collective nature of environmental benefits, which may reduce consumers' ability to see direct outcomes of their actions. Environmental Knowledge emerged as a key driver, with knowledgeable consumers showing stronger intentions to visit green hotels due to their awareness of the environmental benefits and authenticity of green practices.

In contrast, Subjective Norms and Collectivism did not significantly influence visit intention. The lack of impact of subjective norms may reflect the absence of social pressure to prioritize sustainable accommodations, particularly among young, cost-conscious individuals. Similarly, the weak effect of collectivism could be attributed to the individualistic tendencies of the predominantly urban sample, where personal preferences outweighed group-oriented values.

6. Limitations and Future Research

This study was limited to Vietnam due to time and financial constraints, restricting its generalizability to other cultural contexts. The sample was skewed toward younger, low-income participants, potentially biasing results related to budget and experience. Future research should expand to diverse regions and demographics for broader applicability.

Additionally, reliance on self-reported data and pre-existing scales may have constrained the depth of insights, particularly on social factors. Future studies could adopt qualitative methods, such as interviews, to explore consumer motivations and perceptions in greater detail, providing a more comprehensive understanding of sustainable tourism behaviors.

7. Conclusion

This study successfully achieved its objectives by examining the relationships between factors such as green perceived value, quality, and risk, perceived behavioral control, consumer efficacy, environmental knowledge, subjective norms, collectivism, and the intention to visit green hotels. By analyzing customer perceptions and their evaluations of green initiatives, the research provides valuable insights into consumer preferences, motivations, and concerns. These findings enable hotels to tailor their sustainability efforts to better meet customer expectations.

Furthermore, understanding the influence of demographic factors like age, gender, and income, alongside psychographic elements such as environmental values and lifestyle, offers a comprehensive view of what drives eco-conscious accommodation choices. These insights provide actionable recommendations for hospitality stakeholders, helping them improve sustainability practices and effectively attract environmentally conscious travelers. This approach not only enhances customer satisfaction but also supports the broader sustainability goals of the hospitality industry.

References

- Ajzen, I. (1985). From intentions to actions: A theory of planned behavior. *Springer Series in Social Psychology*, 11–39.
- Ajzen, I. (1991). The theory of planned behavior. *Organizational behavior and human decision processes*, 50(2), 179–211.
- Ajzen, I. (2002). Perceived behavioral control, self-efficacy, locus of control, and the theory of planned behavior 1. *Journal of applied social psychology*, 32(4), 665–683.
- Bohdanowicz, P. (2005). European hoteliers' environmental attitudes: greening the business. *Cornell Hospitality Quarterly* 46 (2), 188–204.
- Chang, C. H., Hsu, C. H., & Chen, M. C. (2014). An extended model of theory of planned behavior in predicting pro-environmental behavior. *Social Behavior and Personality*, 42(2), 213–222.
- Chen, M., & Tung, P. (2014). Developing an extended Theory of Planned Behavior model to predict consumers' intention to visit green hotels. *International Journal of Hospitality Management*, 36, 221–230.
- Chen, Y., & Chang, C. (2012). Enhance green purchase intentions. *Management Decision*, 50, 502–520.
- Chen, Y., & Chang, C. (2013). Towards green trust. *Management Decision*, 51, 63–82.
- Engel, J. F., Blackwell, R. D., & Miniard, P. W. (1995). *Consumer Behavior* (8th ed.). Dryden Press.
- Environmental Protection Administration Executive Yuan ROC, 2011. *Sustainable Development Policy Guidelines to Target Sustainable Visions*.
- Fishbein, M., & Ajzen, I. (1975). *Belief, Attitude, Intention, and behavior: An Introduction to Theory and Research*. Addison-Wesley, Reading, MA.

- Green Hotel Association (GHA), 2012. What are Green Hotels?
- Han, H. (2015). Travelers' pro-environmental behavior in a green lodging context: Converging value-belief-norm theory and the theory of planned behavior. *Tourism Management*, 47, 164-177.
- Han, H., Hsu, L.-T., & Sheu, C. (2010). Application of the theory of planned behavior to green hotel choice: testing the effect of environmental friendly activities. *Tourism Management* 31 (3), 325–334.
- Kim, H. Y., & Choi, J. (2017). Predictors of purchase intention towards green apparel products: A cross-cultural investigation in the U.S. and China. *Journal of Fashion Marketing and Management*, 21, 70-87.
- Schultz, P. W., & Zelezny, L. (1999). Values as predictors of environmental attitudes.
- THA (Thai Hotels Association), 2013. Green Leaf Program – A Classification Program: Save Money Save the Environment.
- Wang, J., Tao, J., & Chu, M. (2020). Behind the label: Chinese consumers' trust in food certification and the effect of perceived quality on purchase intention. *Food Control*, 108, 106825.
- Wang, S., Wang, J., Wang, Y., Yan, J., & Li, J. (2018). Environmental knowledge and consumers' intentions to visit green hotels: the mediating role of consumption values. *Journal of Travel & Tourism Marketing*, 35, 1261 - 1271.
- Wu, S. I., & Chen, Y. J. (2014). The impact of green marketing and perceived innovation on purchase intention for green products. *International Journal of Marketing Studies*, 6(5), 81.
- Zeithaml, V. A. (1988). Consumer Perceptions of Price, Quality, and Value: A Means-End Model and Synthesis of Evidence. *Journal of Marketing*, 52(3), 2–22.

The Influence of Product Placement on Luxury Tourism: An S-O-R Model Approach

Anh Dao Kim¹, Phi Hung Truong¹ and Duc Sinh Hoang²

¹Faculty of Management and Economic, Tomas Bata University in Zlín, Czech Republic

²International University, National University of Vietnam, Vietnam

kim@utb.cz

ptruong@utb.cz

hdsinh@hcmiu.edu.vn

Abstract: Product placement has developed into a quite successful marketing tool. Product placement helps businesses and locales to seamlessly fit into the storyline; it also helps brands and destinations to mix in visually driven media like movies, thereby producing a naturally applied advertising approach. The product placement in tourism serves as an effective tool for promoting locations, goods, and services. This study examines product placement in the 2018 film *Crazy Rich Asians* to explore how cinematic portrayals influence destination promotion through the Stimulus-Organism-Response (S-O-R) Model. This study investigates the impact of product placement in luxury tourism by employing purposive sampling to select participants. Semi-structured interviews with a total of 20 participants and two focus groups collected data to understand the perceptions and travel intentions of affluent consumers. The findings reveal that thematic analysis uncovers key themes of destination in the movie, like emotional engagement, aspirational inspiration, and travel intentions, highlighting the impact of cinematic product placement on luxury travel behavior. Travelers view Singapore as a symbol of wealth, status, and exclusivity through the aspirational lens of *Crazy Rich Asians*, significantly shaping their destination preferences. This research demonstrates how movie product placement influences luxury travel behavior, thereby enhancing the SOR model in the tourism literature review. The emphasis on how cinematic depictions develop aspirational consumer wants improves the body of research on the influence of media on destination marketing. The study provides media advice to draw luxury visitors; marketing professionals can use product placement in movies to boost local appeal and customer involvement.

Keywords: Product placement, Movie, Luxury tourism, Qualitative study, SOR model, Aspirational consumption

1. Introduction

In recent years, there has been a significant increase in the number of brand and product placements. This is due to the fact that businesses have begun incorporating their brands directly into entertainment content in order to better engage audiences (Thomas & Kohli, 2011). Product placement is a concept that has been used in marketing literature to investigate how the appearance and use of products in movies or on television influence the appeal of those products to consumers. This concept has been used throughout the marketing literature. According to the research conducted by Su et al. (2011) on the topic of product placement in tourism, destination product placement tourism is defined as a tourist destination spot that serves as the onscreen location backdrop for a television program. This type of tourism may be considered a placed "product." According to Karniouchina et al. (2016), films and television series have the potential to significantly boost tourism to a particular city, region, or geographic location.

Crazy Rich Asians, directed by Jon M. Chu and adapted from Kevin Kwan's 2013 novel, achieved international acclaim upon its release in 2018, grossing \$239 million worldwide on a modest \$30 million production budget (Lowe, 2022). The film follows Rachel Chu, an independent Chinese American economics professor, as she accompanies her boyfriend, Nick Young, to his hometown in Singapore for a wedding, only to discover that Nick belongs to one of Asia's wealthiest and most prestigious families (Sio, 2018; Nagaraj & Aaron, 2020). The narrative juxtaposes Rachel's self-made American Dream with Nick's heritage as the golden grandson of a powerful Singaporean matriarch, exploring themes of class conflict and generational wealth (Sio, 2018). The film's portrayal of Singapore as a luxurious travel destination highlights the city's opulent lifestyle, featuring luxury establishments, high-end services, and exclusive social settings. By seamlessly integrating luxury branding, such as Pacific Asean Airlines' first-class service, into its storytelling, the film not only enriches its depiction of affluence but also promotes premium travel experiences. Furthermore, the way characters interact with the location on screen significantly influences how viewers perceive and connect with the destination, illustrating how media can shape audience attitudes toward travel (Russell et al., 2006; Su et al., 2011).

Product placement, known as "brand integration," entails the incorporation of branded products or identifiers via audio or visual methods within mass media content (Balasubramanian, 1994). The objective of product placement is to augment the appeal and persuasive power of a product or brand by integrating it into the lifestyle and context of the media in which it is featured (Chen, 2023). Hudson and Ritchie (2006) define film-

induced tourism, or movie-induced tourism, as tourist visits to a destination or attraction prompted by its portrayal in television, video, or cinema. Destination placement, defined as the representation of a destination in audiovisual media, can be regarded as a variant of product placement (Morgan & Pritchard, 1998; Hudson, Wang, & Gil, 2011). Product placement in tourism is essential for destination marketing (Group, 2020). In this context, product placement entails the incorporation of destinations, products, or services within media such as films or videos to effectively promote these destinations to travelers. Product placement in tourism helps to shape audience perceptions and travel intentions, promoting the attractions of the presented destination.

This research employs a qualitative methodology to investigate the influence of destination product placement in films on consumers' decision-making processes, adopting the S-O-R model as the analytical framework. These findings demonstrate that stimuli integrated into films may trigger emotional reactions from viewers, which substantially affect their destination selections. This research provides significant insights into media and marketing strategies targeting luxury travelers. It indicates that marketing professionals could use product placement in movies to augment the local attraction of destinations and promote increased visitor engagement.

2. Literature Review

2.1 Theoretical Framework

S-O-R stands for stimuli, organism, and response, which was introduced by Mehrabian and Russell in 1974. The framework states that external stimuli do not directly affect consumer behavior (Hussain et al., 2022). These stimuli affect the consumer's internal state, determining the behavioral outcome (Hussain et al., 2022). Numerous studies have used the S-O-R model to examine how various factors affect audiences' travel destination perceptions and emotions (Baber & Baber, 2022; Rajaguru, 2013). The stimulus in the S-O-R model is an external variable that can cause an organism to react. These stimuli include social interactions, the environment, product design, pricing, and advertising content (Yang et al., 2021). The model emphasizes an indirect pathway where internal emotional and cognitive reactions translate these stimuli into behavior. According to Balasubramanian et al. (2006), product placement in media can grab viewers' attention and influence how they process the content, affecting its persuasiveness. Product placement subtly affects viewers' emotions by seamlessly integrating brands into entertainment (Neale & Corkindale, 2022). The organism stage involves emotional, cognitive, and attitudinal mechanisms that mediate stimuli-response (Sinh et al., 2024). In tourism, product placement in films shows destinations, evoking emotions. After internal processing, the organism's behavior is observed (Chang et al., 2015). This response leads to travel plans, internet research, and excitement. Kim et al. (2018) found that authentic virtual reality experiences affect cognitive and affective responses and visit intentions, applying the S-O-R framework to emerging tourism technologies. Jiang et al. (2022) use the S-O-R model to study how promotional short videos affect tourists' decisions post-pandemic. These behaviors demonstrate how cognitive and emotional processing enhances trip planning and list-making. SOR provides a structured way to analyze how external media influences consumer behavior, especially in tourism marketing.

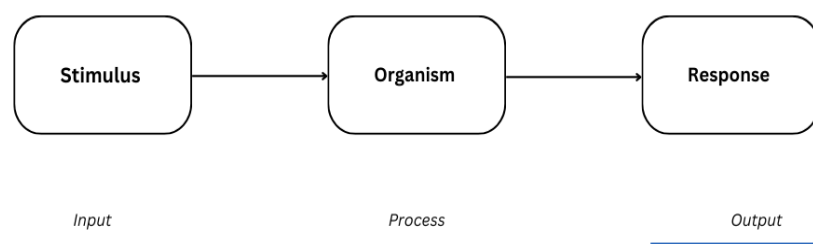


Figure 1: SOR Model (Mehrabian and Russell,1974)

2.2 Product Placement in Tourism

Film, television, video games, online games, music videos, mobile apps, and social media have employed product placement (Van Reijmersdal, Smit, and Neijens, 2010). Product placement involves strategically integrating branded products, packaging, signage, or other trademarked elements into movies, TV shows, or other media platforms. This improves brand recall and helps consumers recognize brands at the point of purchase,

influencing buying behavior (Panda, 2004). Su (2011) defines destination placement as the marketing integration of a place or destination in media and advertising. Product placement, or destination product placement, promotes the destination and its many products and services in tourism. They blend seamlessly into the storyline, adding realism and subtlety to their persuasiveness (Balasubramanian et al., 2006). When products or locations are part of the plot, they appear more natural and less like advertising, making it harder for viewers to identify their influence.

Destination placement within movies, TV shows, and advertisements has the potential to stimulate consumers' intentions to visit featured locations. In this context, the integration of destinations into media content can be considered a form of tourism product placement, where the destination itself functions as a marketed product to attract travelers (Hudson & Ritchie, 2006). According to Croy (2010), managing a destination's image effectively requires a systematic approach, especially when using movies that emphasize and reaffirm positive aspects of the location. Furčić and Pranić (2021) provide additional support for this viewpoint by stressing how crucial it is for destination marketers to assess how movie-induced tourism fits into their overall marketing plans, as shown in areas like Zadar County, Croatia. This kind of cinematic picture alignment with destination branding not only makes the place more appealing, but it also has a big influence on traveler behavior. Bolan et al. (2011) further highlight the impact of carefully planned movie placements on tourism results by presenting evidence that movies, through their appealing narratives and visual appeal, help to increase awareness and profitability for featured sites.

Product placement transforms hotel rooms and cruise ship cabins into immersive spaces where customers can interact with and experience products (Chang, 2018). *Crazy Rich Asians* highlights Singapore's urban sophistication and natural beauty in several stunning locations. Colin and Araminta's lavish wedding at Chijmes, a Gothic chapel, showcases its architectural beauty and makes it a top wedding destination. The narrative uses Merlion Park, home to the Merlion statue, and Gardens by the Bay, home to the Supertree Grove, to show Singapore's ability to combine technology with nature. The film features tropical islands like Rawa Island and Samara Island as exclusive and peaceful retreats to enhance its luxury travel portrayal. These locations reinforce the film's theme of opulence and promote Singapore and its surroundings as top destinations, encouraging visitors to explore their cultural, architectural, and natural beauty.

Viewers often accept product placements more naturally, which may influence their next destination (Seo & Kim, 2019). For instance, K-Pop music videos often endorse locations. Incorporating local customs and experiences into the storyline enhances audience connection and attracts future visitors (Almeyda-Ibanez & George, 2017). *Crazy Rich Asians* successfully integrated local events, luxurious destinations, and rich culture to attract tourists. The movie also seamlessly blends traditional and modern elements of the local way of life, such as vibrant hawker markets and customary festivals, making the destination more approachable and engaging. Showing history and modern luxury engages viewers and gives a bigger picture of Lion City. The movie also highlights luxury brands, luxurious cars, and lavish lifestyles, promoting Singapore as Southeast Asia's luxury capital. The narrative makes the city seem wealthy and exclusive. *Crazy Rich Asians* promotes Singapore as a luxury destination using these elements. The movie's luxury fashion brands, lavish parties, and high-end destinations show Singapore's luxury tourism potential and emphasize its theme of riches.

3. Methodology

This study examines how product placement in films influences consumer perceptions and travel intentions in luxury tourism. The central research question is: How does product placement in films shape the perceptions and travel intentions of luxury tourists through S-O-R model?

To address this, the study explores the role of destination product placement in shaping luxury tourism images and examines how emotional engagement and aspirational inspiration influence consumer decisions. It also assesses whether cinematic portrayals translate into active interest, such as destination searches and trip planning. Finally, it provides practical recommendations for tourism marketers on leveraging product placement to enhance destination appeal. By clarifying these objectives, the study bridges theoretical insights and industry applications, offering valuable guidance for destination marketing strategies.

3.1 Sampling and Data Collection

This study adopts a qualitative methodology with purposive sampling to select participants capable of providing valuable insights into luxury travel perceptions and the influence of media portrayals. The research begins with semi-structured interviews involving a total of twenty participants, comprising five experts in the tourism industry and fifteen experienced luxury travelers. We conducted two focus group discussions to further explore

the emerging themes and deepen the analysis of key ideas. The initial interviews provided detailed, personal accounts of high-end travel experiences and the impact of media representations, while the focus groups allowed participants to collaboratively refine and expand on these perspectives.

The participant demographic reflects a diverse mix of employment statuses, ages, genders, educational backgrounds, and travel preferences (Table 2). The study employs a qualitative approach with purposive sampling, selecting 20 participants interested in luxury travel. Semi-structured interviews were conducted from June to August 2024, followed by two focus groups in September 2024. Participants were chosen based on their interest and experience in luxury travel to explore how product placement in films influences their perceptions and travel decisions. Among the 15 experienced travelers, 9 are full-time employees, and 6 are business owners, providing insights from both organizational and entrepreneurial viewpoints. Participants range in age from 24 to 56, with the majority aged between 25 and 40, offering a balance of early-career professionals and seasoned individuals. The gender distribution skews predominantly female, with 10 participants (67%) identifying as female and 5 (33%) as male, emphasizing women's perspectives in luxury travel. Educationally, 8 participants hold bachelor's degrees, 5 have master's degrees, and 2 possess doctoral qualifications, demonstrating a range of expertise and analytical depth. While most participants expressed a preference for luxury travel, only a small proportion focused on eco-luxury tourism, providing additional perspectives on sustainability in high-end travel.

3.2 Procedure

Interview questions covered personal and professional definitions of luxury travel and how media portrayals affect consumer travel choices. Five tourism and marketing experts discussed how the media, including films, shapes consumer perceptions of luxury travel destinations, while fifteen consumers shared their own experiences. Three marketing managers, one hotel manager, and a travel agency CMO aged 28–56 represented a range of career stages and professional expertise. The group of four men and one woman offered mostly male perspectives with a female leader. This diverse professional background informed tourism marketing and operational strategies (Table 1). After the interviews, we held two focus groups to further analyze the themes. Each focus group had six to eight luxury travel enthusiasts who discussed how popular films portray luxury tourism and how it affects destination perceptions. Each 60-minute session created a dynamic and open space for participants to share their thoughts and experiences. We collected all data, including focus groups, online for convenience and accessibility. Interviews averaged 45 minutes. Interviews and focus groups examined how luxury travel media portrayals affect consumer and industry attitudes. Consumer and expert voices provided a multifaceted understanding of how media shapes luxury tourism perceptions and preferences.

4. Finding and Discussion

Table 3 illustrates how the S-O-R model is applied to analyze the impact of destination product placement in thematic movies. The movie's featured destination represents the stimulus, acting as an external trigger to capture viewers' attention. The organism phase reflects the audience's emotional engagement and aspirational inspiration, shaping their perception of the destination. Finally, the response phase translates these internal reactions into actions, such as searching for the destination or forming an intention to visit. After that, we will move on to each stage and analyze each theme.

4.1 Stimuli

Destination in movies

The findings indicate that the portrayal of destinations in films significantly influences tourist perceptions and motivations. The movie *Crazy Rich Asians* presents Singapore as an exclusive and luxurious destination, showcasing its world-class hotels, fine dining experiences, and grand social events. Respondents expressed a strong connection to this depiction, perceiving Singapore as a symbol of wealth, prestige, and social status. The presence of iconic attractions such as Marina Bay Sands and Gardens by the Bay in the film served as powerful visual stimuli that captured audience interest and reinforced Singapore's image as a premier travel destination. For viewers who aspire to high-end lifestyles, the portrayal of opulence acted as a strong motivator for visiting the country. One respondent stated, "I like to check in in the famous place that promote in the movie or luxury destination where celebrity stay at."

These findings align with Sawinska and Smalec (2023), who argue that external factors, such as media portrayal and promotional strategies, significantly shape destination appeal. Gallagher (2020) also highlights how the film's acclaim for its portrayal of Asian culture enhances its cross-cultural appeal, further strengthening its role as a tourism stimulus. The concept of aspirational travel is also reinforced by Aura (2023), who emphasizes the

role of social class representation in shaping luxury tourism narratives. As a result, the association between film representation and destination attractiveness becomes a valuable tool for destination marketers. This study confirms that cinematic portrayals can create strong aspirational motivations among tourists, making luxury destinations more desirable.

4.2 Organism

Emotional Engagement

The results indicate that the extravagant depiction of Singapore in the film strongly influenced viewers' emotional engagement. Many participants reported experiencing admiration, aspiration, and a desire to immerse themselves in the luxurious lifestyle portrayed on screen. The setting effectively positioned Singapore as an elite destination, making audiences perceive it as a temporary gateway to exclusivity and prestige. The emotional connection formed through this portrayal significantly impacted viewers' travel intentions, as they expressed a heightened interest in visiting the destination after watching the film.

This aligns with Yi et al. (2022), who suggest that films allow audiences to deeply engage with the emotions and experiences of characters, thereby fostering a stronger attachment to the depicted location. Similarly, Chang (2015) argues that the inclusion of culturally familiar elements in films can elicit emotional responses, further motivating viewers to explore the featured destinations. Participants expressed their engagement with statements such as:

"The scene that takes place in beautiful places makes me feel excited and interested."

"When I watch a movie and see a fancy or unusual setting, it makes me want to imagine myself there."

The emotional responses of the participants suggest that the film's representation of Singapore played a crucial role in shaping their perceptions and potential travel behaviors. These findings highlight how cinematic representations can function as powerful triggers for tourism interest and destination attachment.

Aspirational Inspiration

The findings further suggest that the film inspired aspirations among viewers by portraying Singapore as a symbol of social and economic achievement. Participants expressed motivation to visit the country, associating its luxurious accommodations and exclusive settings with an elevated status. This indicates that the film not only influenced viewers' emotional engagement but also reinforced aspirational travel desires, positioning Singapore as a desirable and prestigious destination.

These results align with the conclusions of Michael et al. (2020), who found that cinematic portrayals often lead audiences to relive on-screen experiences and develop an increased motivation for travel. This phenomenon, known as film-induced tourism, demonstrates how films can expand viewers' aspirations beyond their familiar environments. Likewise, Hudson et al. (2010) emphasized the role of cinema in shaping tourists' perceptions and desires, noting that aspirational imagery in films can enhance travel motivations. Participants' responses reflected these findings:

"The way movies show luxurious accommodations and private beaches makes me feel inspired about the destination."

The responses suggest that the film played a crucial role in shaping viewers' perceptions of Singapore as a high-status destination, reinforcing their aspirations to experience the exclusivity depicted on screen. By creating strong emotional and aspirational connections, cinematic portrayals can significantly influence audience travel behavior and destination selection.

4.3 Response

Searching for the Destination

The results indicate that after watching the film, many participants actively sought more information about Singapore. This included online searches for attractions, accommodations, activities, and travel experiences. Respondents reported engaging with travel review platforms and reading online comments to verify whether the real destination matched the film's portrayal. Additionally, participants highlighted the role of online reviews in influencing their perceptions and building trust in the destination, which, in turn, strengthened their travel intentions.

These findings align with Min et al., who emphasize the significance of cinematic representations in shaping destination images and their impact on the tourism industry (Xu et al., 2019). The transition from passive media consumption to active engagement with a destination is a crucial phase in travel planning, during which individuals seek information to validate their interest. Similarly, Abubakar (2016) highlights that positive online reviews can enhance travelers' confidence in a destination and encourage actual visits. Participant responses reflected this engagement:

"I search online to see if the destination looks the same as it does in the movie."

"I look up the destination to explore it further on travel review sites and start planning my trip before visiting."

These results demonstrate how film exposure can serve as a catalyst for increased destination awareness and information-seeking behavior, reinforcing the connection between cinematic representation and travel motivation.

Intention to Visit

The findings also indicate a strong correlation between watching the film and participants' intention to visit Singapore. Several respondents expressed a newfound interest in traveling to the country after seeing its depiction in the movie, even if they had not previously considered it as a travel destination. The aspirational and immersive nature of the film contributed to altering perceptions and fostering a desire to experience the location firsthand.

This is consistent with Redondo (2012), who asserts that films provide viewers with a virtual exploration of destinations, potentially sparking travel interest. Similarly, Hudson, Wang, and Gil (2011) argue that indirect experiences through cinema can enhance destination perception and serve as a motivational factor for travel. Participants articulated this shift in perception as follows:

"I want to visit Singapore after seeing the movie."

"I wasn't planning to visit Singapore, but the film changed that. I will definitely explore it."

The influence of film on travel decisions is further supported by Kim and Richardson (2003), who found that exposure to the film *Before Sunrise* significantly increased awareness and intention to visit Vienna. The case of Singapore follows a similar trend, where cinematic prominence contributes to increased symbolic value and desirability as a travel destination. In luxury tourism, this effect is particularly notable, as high-status locations often attract visitors due to their prestige and media representation rather than just their tangible offerings.

Overall, these results highlight the power of film in influencing destination appeal and visitor intentions, reinforcing its role as a key driver in tourism decision-making.

5. Theoretical Contributions and Practical Contributions

This study highlights the significant influence of cinematic product placement on luxury tourism perceptions and travel behavior. The findings demonstrate that films can shape emotional engagement, aspirational desires, and real travel intentions, making them a powerful tool for destination marketing. The S-O-R model effectively explains how external stimuli, such as destination portrayals in films, trigger emotional and cognitive responses that ultimately lead to behavioral changes, such as searching for information or planning a trip. The results confirm that luxury travel decisions are strongly influenced by media portrayals, particularly when they align with aspirational consumer desires. A key insight from this study is the importance of emotional engagement and aspirational appeal in film-induced tourism. The depiction of Singapore in *Crazy Rich Asians* created a strong sense of exclusivity and status, encouraging viewers to associate the destination with luxury and success. However, the findings also suggest that destination marketers must ensure authenticity and cultural accuracy when using product placement as a promotional strategy. Some participants raised concerns about the selective portrayal of Singapore's elite lifestyle, highlighting the need for balanced and realistic representations that appeal to a wider audience while maintaining aspirational value.

From a practical perspective, destination marketers and tourism boards can leverage film partnerships to promote luxury travel by strategically positioning their locations in high-profile productions. This study suggests that collaborating with filmmakers to showcase premium accommodation, high-end experiences, and cultural uniqueness can significantly enhance a destination's appeal. However, beyond film exposure, digital engagement is crucial. Many participants sought further information about Singapore through social media,

travel platforms, and online reviews, indicating that tourism boards should integrate interactive and immersive marketing strategies to reinforce the cinematic appeal. Additionally, luxury brands and tourism operators can capitalize on aspirational tourism trends by offering exclusive experiences directly linked to film portrayals. Hotels, resorts, and luxury service providers can create movie-inspired travel packages, allowing visitors to immerse themselves in the settings and experiences featured in films. This strategy not only strengthens brand positioning but also enhances the emotional connection between consumers and the destination. Despite these insights, the study has some limitations. The findings are based on qualitative data from a relatively small sample, limiting generalizability. Future research should explore quantitative approaches to measure the long-term impact of cinematic product placement on travel behavior across different demographics. Additionally, cross-cultural comparisons could provide deeper insights into how different audiences respond to luxury tourism portrayals in films.

In conclusion, this study reinforces the growing influence of film-induced tourism in luxury travel and offers valuable guidance for marketers looking to enhance destination branding. By combining strategic product placement, digital engagement, and authentic storytelling, tourism professionals can create compelling travel experiences that resonate with aspirational consumers. Moving forward, the integration of cinematic tourism marketing with evolving digital platforms will be key to sustaining long-term interest and engagement in luxury travel destinations.

6. Conclusion and Suggestions

The study recommends combining marketing with the media's aspirational appeal to boost brand loyalty. It also shows how tourism boards and films can increase destination visibility and desirability among rich people. This study expands the SOR Model to explain luxury tourism consumer behavior. It uses aspirational consumption theory to show how luxury destination movies affect rich customers' travel plans. The study provides a new perspective on how film depictions of wealth, status, and exclusivity affect high-net-worth individuals' travel preferences. The role of emotional engagement in mediating these reactions emphasizes how affective experiences affect luxury travel behavior. To improve product and destination placement in films, authentic location representation is essential. First, the destination should be strategically and seamlessly integrated into the storyline to add meaning. This approach boosts authenticity and creates an emotional connection between the audience and the location, increasing interest and travel intentions. Second, accuracy is crucial to building traveler trust, so don't misrepresent the destination. *Crazy Rich Asians* was criticized for depicting Singapore inaccurately by including North-Chinese traditions that did not reflect local culture and filming large parts in Malaysia (Babcock & Huggins, 2021). Maintaining credibility and generating genuine interest in the featured destination requires accurate cultural and geographical placement. Limitations and future research. The study's qualitative methods, focus on a single premium location, and inability to extrapolate results to larger populations are its limitations. Future studies could use quantitative methods to validate findings from various locations and media formats. Emotional engagement is poorly understood, and the study mostly includes wealthy people. However, more middle-class "aspirational travelers" may interact with luxury media, enabling more sophisticated categorization. Longitudinal research could examine how frequent media exposure affects travel intentions and destination impressions. Overall, longitudinal methods, more consumer groups, sophisticated emotional analysis, more media types, and blended methods may benefit future research.

Acknowledgement

The authors sincerely thank doc. Ing. Michal Pilík, Ph.D. and doc. Ing. Michael Adu Kwarteng for their invaluable guidance and support.

Funding: This work is supported by the Internal Grant Agency of FaME, Tomas Bata University in Zlínno.IGA/FaME/2025/008

References

- Almeyda-Ibáñez, M., & George, B. (2017). Place branding in tourism: A review of theoretical approaches and management practices. *Tourism & Management Studies*, 13(4), 10–19. <https://doi.org/10.18089/tms.2017.13402>
- Bolan, P., Boy, S., & Bell, J. (2011). "we've seen it in the movies, let's see if it's true." *Worldwide Hospitality and Tourism Themes*, 3(2), 102–116. <https://doi.org/10.1108/17554211111122970>
- Babcock, J., & Huggins, K. (2021). Babcock & Huggins - Destination Storytelling Singapore. <https://seamsassociation.files.wordpress.com/2022/01/004-babcock-huggins-destination-storytelling-singapore.pdf>

- Baber, R., & Baber, P. (2022). Influence of social media marketing efforts, e-reputation and destination image on intention to visit among tourists: Application of S-O-R model. *Journal of Hospitality and Tourism Insights*, 6(5), 2298–2316. <https://doi.org/10.1108/jhti-06-2022-0270>
- Balasubramanian Siva K. (1994), "Beyond Advertising and Publicity: Hybrid Messages and Public Policy Issues," *Journal of Advertising*, 23 (December), 29–46.
- Chang, W.-Y. (2018). A study on the impact of Tourism Product Placement Marketing on Tourism intention. *KnE Social Sciences*, 3(10). <https://doi.org/10.18502/kss.v3i10.3505>
- Chang, D. Y. (2015). A study of TV drama series, cultural proximity and travel motivation: Moderation effect of enduring involvement. *International Journal of Tourism Research*, 18(4), 399–408. <https://doi.org/10.1002/jtr.2058>
- Croy, W. G. (2010). Planning for film tourism: Active destination image management. *Tourism and Hospitality Planning & Development*, 7(1), 21–30. <https://doi.org/10.1080/14790530903522598>
- Chen, P.-T. (2023). Influence of film destination placement on travel intention: Mediating effect of involvement and place attachment. *International Journal of Tourism Cities*, 9(2), 411–428. <https://doi.org/10.1108/ijtc-05-2022-0132>
- Furčić, M., & Pranić, L. (2021). What they say and what they do: Comparing destination marketing activities related to movie tourism in Croatia's Zadar County. *Tourism in Southern and Eastern Europe*, 283–302. <https://doi.org/10.20867/tosee.06.19>
- Hudson, S., & Ritchie, J. R. (2006). Promoting destinations via film tourism: An empirical identification of supporting marketing initiatives. *Journal of Travel Research*, 44(4), 387–396. <https://doi.org/10.1177/0047287506286720>
- Hudson, S., Wang, Y., & Gil, S. M. (2010). The influence of a film on destination image and the desire to travel: A cross-cultural comparison. *International Journal of Tourism Research*, 13(2), 177–190. <https://doi.org/10.1002/jtr.808>
- Hussain, A., Hooi Ting, D., Zaib Abbasi, A., & Rehman, U. (2022). Integrating the S-O-R model to examine purchase intention based on Instagram sponsored advertising. *Journal of Promotion Management*, 29(1), 77–105. <https://doi.org/10.1080/10496491.2022.2108185>
- Jiang, J., Hong, Y., Li, W., & Li, D. (2022). A study on the impact of official promotion short videos on tourists' destination decision-making in the post-epidemic era. *Frontiers in Psychology*, 13. <https://doi.org/10.3389/fpsyg.2022.1015869>
- Lowe, J. (2022). Mapping tropicality in the masculinities and femininities of Global Singapore in *crazy rich asians*. *Gender, Place & Culture*, 30(2), 278–298. <https://doi.org/10.1080/0966369x.2022.2035698>
- Karniouchina, E. V., Uslay, C., & Erenburg, G. (2016). (PDF) the case for product placement. https://www.researchgate.net/publication/315671875_The_Case_for_Product_Placement
- Kim, S.K. (2012), "Audience involvement and film tourism experiences: emotional places, emotional experiences", *Tourism Management*, Vol. 33 No. 2, pp. 387-396.
- Kim, M. J., Lee, C.-K., & Jung, T. (2018). Exploring consumer behavior in virtual reality tourism using an extended stimulus-organism-response model. *Journal of Travel Research*, 59(1), 69–89. <https://doi.org/10.1177/0047287518818915>
- Mehrabian, A. (1974). *An approach to environmental psychology*. Google Books. https://books.google.com/books/about/An_Approach_to_Environmental_Psychology.html?id=upV9AAAAMAAJ
- Michael, N., Balasubramanian, S., Michael, I., & Fotiadis, A. (2020). Underlying motivating factors for movie-induced tourism among Emiratis and Indian expatriates in the United Arab Emirates. *Tourism and Hospitality Research*, 20(4), 435–449. <https://doi.org/10.1177/1467358420914355>
- Neale, M., & Corkindale, D. (2022). Make product placement work for you: Get less exposure. *Business Horizons*, 65(2), 149–157. <https://doi.org/10.1016/j.bushor.2021.02.034>
- Sriganeshvarun, Nagaraj and Anil Aaron, Selvaram (2020) Destination Image, Hyperreality, Unreal Image Through Films. A Case Study of the Film Crazy Rich Asians. *INTI JOURNAL*, 2020 (62). ISSN e2600-7320
- Panda, T. K. (1970, January 1). *Effectiveness of product placements in Indian films and its effects on brand memory and attitude with special reference to Hindi films*. DSpace Home. <http://dspace.iimk.ac.in/xmlui/handle/2259/555>
- Russell, C. A., Stern, B. B., & Stern, B. B. (2006). Consumers, characters, and products: A balance model of sitcom product placement effects. *Journal of Advertising*, 35(1), 7–21. <https://doi.org/10.2753/joa0091-3367350101>
- Redondo, I. (2012). Assessing the appropriateness of movies as vehicles for promoting tourist destinations. *Journal of Travel & Tourism Marketing*, 29(7), 714–729. <https://doi.org/10.1080/10548408.2012.720156>
- Rajaguru, R. (2013). Motion picture-induced visual, vocal and celebrity effects on tourism motivation: Stimulus organism response model. *Asia Pacific Journal of Tourism Research*, 19(4), 375–388. <https://doi.org/10.1080/10941665.2013.764337>
- Sawinska, A., & Smalec, A. (2023). Film tourism in the promotion of a touristic area. *EUROPEAN RESEARCH STUDIES JOURNAL*, XXVII(Issue 4), 513–522. <https://doi.org/10.35808/ersj/3302>
- Sio, J. U.-S. (2018). Crazy rich asians (2018). *Asian Ethnicity*, 20(3), 393–395. <https://doi.org/10.1080/14631369.2018.1559035>
- Su, H. J., Huang, Y.-A., Brodowsky, G., & Kim, H. J. (2011). The impact of product placement on TV-induced tourism: Korean TV dramas and Taiwanese viewers. *Tourism Management*, 32(4), 805–814. <https://doi.org/10.1016/j.tourman.2010.06.020>
- Seo, J. H., & Kim, B. (2019). The "Hallyu" phenomenon: Utilizing tourism destination as product placement in K-Pop culture. *Tourism Economics*, 26(4), 719–728. <https://doi.org/10.1177/1354816619837111>
- Sinh Duc, S. D., Kim, D. A., Hung, T. P., & Pham, N. M. (2024). Swipe, watch, buy: Unraveling the power of product placement in short videos on Youth Impulse purchasing. *European Conference on Social Media*, 11(1), 296–304. <https://doi.org/10.34190/ecsm.11.1.2409>

- Thomas, S., & Kohli, C. S. (2011). Can brand image move upwards after sideways? A strategic approach to brand placements. *Business Horizons*, 54(1), 41–49. <https://doi.org/10.1016/j.bushor.2010.08.002>
- Yang, J., Peng, M. Y.-P., Wong, S., & Chong, W. (2021). How e-learning environmental stimuli influence determinates of learning engagement in the context of covid-19? sor model perspective. *Frontiers in Psychology*, 12. <https://doi.org/10.3389/fpsyg.2021.584976>
- Yi, K., Li, F., Zeng, Y., Xie, C., & Xu, Z. (2022). The mediating role of empathy in the internal mechanism of film-induced tourism. *Frontiers in Psychology*, 13. <https://doi.org/10.3389/fpsyg.2022.900998>

Appendix

Table 1: Expert interview demographic

No	Employment	Age	Gender
Participant 1	Marketing Manager	35	M
Participant 2	Hotel Manager	28	M
Participant 3	Marketing Manager	40	M
Participant 4	Marketing Manager	56	M
Participant 5	CMO Travel Agency	30	F

Table 2: Demographic

No	Employment Status	Age	Gender	Education	Type of travel
Participant 1	Full time employed	28	F	Bachelor's degree	Luxury travel
Participant 2	Full time employed	25	F	Master's degree	Eco-luxury tourism
Participant 3	Full time employed	35	M	Bachelor's degree	Eco-luxury tourism
Participant 4	Full time employed	40	F	Doctorate	Luxury travel
Participant 5	Business owner	50	F	Bachelor's degree	Luxury travel
Participant 6	Business owner	49	F	Bachelor's degree	Luxury travel
Participant 7	Business owner	37	M	Bachelor's degree	Luxury travel
Participant 8	Business owner	56	F	Bachelor's degree	Luxury travel
Participant 9	Business owner	37	M	Master's degree	Luxury travel
Participant 10	Business owner	48	M	Master's degree	Luxury travel
Participant 11	Full time employed	35	M	Doctorate	Luxury travel
Participant 12	Full time employed	29	F	Bachelor's degree	Luxury travel
Participant 13	Full time employed	34	F	Master's degree	Luxury travel
Participant 14	Full time employed	24	F	Bachelor's degree	Luxury travel
Participant 15	Full time employed	27	F	Master's degree	Luxury travel

Table 3: Thematic based on SOR Model

Construct	Theme
<i>Stimulus</i>	Destination in the movie
<i>Organism</i>	Emotional engagement Aspirational inspiration
<i>Response</i>	Searching for the destination Intention to visit

Masters Research Papers

Looking at two Decades of OTA Research: A Bibliometric Approach

Kamran Nazmabadi

School of Hospitality, Food and Tourism Management, University of Guelph, Canada

Kamran.nazmabadi@gmail.com

Abstract: Online Travel Agencies (OTAs) have profoundly influenced the hospitality and tourism industry, necessitating an understanding of the evolution of OTA research. This study employs bibliometric analysis to examine the progression, thematic structure, and future directions of OTA research from 2000 to February 2024. By analyzing publication trends, the study illustrates the increasing significance of OTA research, evidenced by its growing volume and acceleration rate. Three dominant themes—satisfaction, management and service quality, and consumer behavior—were identified, alongside five key co-citation clusters, including online reviews and eWOM, research methods and theory development, and channel distribution strategies. Co-word analysis revealed shifting focal points in OTA research, transitioning from loyalty (2005) to trust (2012) and behavior (2021). Co-word analysis further revealed shifting trends in OTA research, from loyalty (2005-2012) to trust (2012-2021) and behavior (mid-2021 onwards). Thematic analysis identified pivotal intellectual milestones, with revenue management and pricing strategy emerging as themes of high centrality but low knowledge development, emphasizing their importance yet underdeveloped state. This research recommends exploring collaborations between OTAs and hospitality stakeholders, including contracts, commissions, convergent marketing, and co-branding, while incorporating advancements in artificial intelligence and digital transformation. Therefore, future studies are recommended to incorporate these advanced analytical methods to present the most up-to-date ideas. In light of changing consumer behaviors driven by trends like post-COVID-19 risk aversion, digital transformation, and health consciousness, this study encourages research into subthemes such as solo travel and smart purchasing. This comprehensive analysis synthesizes two decades of OTA literature, offering a holistic view of its knowledge structure and progression. It provides valuable insights for both academia and practitioners by presenting an integrated overview of OTA research, identifying gaps, and proposing strategic directions. This study advances OTA research in hospitality and tourism, paving the way for future investigations of its industry impact.

Keywords: Online travel agencies, Bibliometric analysis, Consumer behavior, Digital transformation, Revenue management

1. Introduction

OTAs have transformed hospitality through technology investments and a focus on hotels (Lv et al, 2020). By 2022, online channels generated \$475 billion in travel revenue, projected to surpass \$1 trillion by 2030. Booking Holdings and Expedia reported 2022 revenues of \$17 billion and \$12 billion, respectively, with hotels as the main product (Statista, 2024). OTA research covers hotel partnerships (Chen, 2023; Abdullah et al, 2021), pricing strategies (Alderighi et al, 2022), consumer behavior (Zhu et al, 2023; Talwar et al, 2020), and service quality (Khan et al, 2023). However, systematic reviews and bibliometric analyses of OTA research remain scarce (Garcia et al., 2022). Existing reviews focus on online booking (Li & Zhu, 2022), social media (Azazi & Shaed, 2020), and broader technological trends (Shin et al., 2022), but lack a dedicated synthesis of OTA research. This absence limits understanding of how OTA research has evolved in terms of publication growth, shifting thematic priorities, and methodological developments. Without such an analysis, researchers and practitioners lack insights into key intellectual milestones, underexplored areas, and emerging trends shaping OTA scholarship. Therefore, given OTAs' dynamic impact on the industry, a structured overview is essential for guiding future studies and practice. Addressing such a gap, this study aims to: 1) signifies the growing importance of OTA research, 2) analyzing publication trends and growth patterns, 3) identifying thematic shifts over time, 4) mapping methodological advancements, and 5) propose future research directions. Using comprehensive bibliometric analyses—descriptive, citation, co-citation, bibliographic coupling, co-word, and thematic mapping—it synthesizes two decades of research to provide insights for future studies and evidence-based guidance for industry practitioners.

2. Methodology

This study employs a two-step scoping review approach, integrating bibliometric analysis and qualitative synthesis to examine the evolution of OTA research (Munn et al, 2018). Bibliometric analysis maps publication trends, intellectual structures, and thematic progressions, using bibliographic clustering to identify research themes (Pournader et al., 2020), which has been used in hospitality research domains (Shin et al, 2022). A qualitative synthesis refines these findings, ensuring validity by having both the author and a tourism and hospitality professor from the University of Guelph independently review and discuss the top five most-cited articles per cluster (Arksey & O'Malley, 2005). Following PRISMA framework (Figure 1), data was extracted from Web of Science using specific keywords ("Online Travel Agency" OR "Online Travel Agencies") and refined

through inclusion criteria (peer-reviewed, 2000–2024, reputable publishers) (Mariani & Baggio, 2021). The initial search on February 22, 2024, retrieved 365 articles. After applying criteria like reputable publishers (Mokhtari et al, 2020) and filtering for full-length English articles from 2000-2024 (Garcia et al, 2022), the dataset was refined. After excluding irrelevant fields and content, 108 articles were finalized for analysis. While reliance on Web of Science may limit comprehensiveness, future studies could incorporate Scopus or Google Scholar for broader coverage.

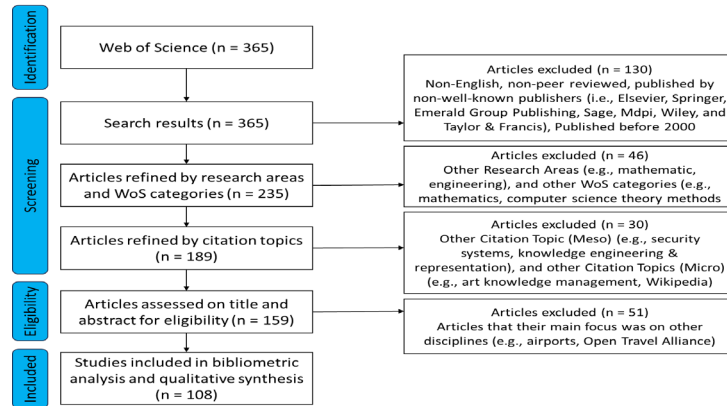


Figure 1: PRISMA Flowchart

3. Overall Description of OTA Research

OTA research grew steadily from 2005-2023, peaking in 2010 and 2016. The 2024 decline is likely due to early-year data collection. Tourism Management leads journal contributions (10%), followed by International Journal of Hospitality Management (7.4%), Sustainability (6.5%), International Journal of Contemporary Hospitality Management (5.5%), and Journal of Vacation Marketing (5.5%).

Law is the most productive and locally cited author, with Guo and Ling following. Globally, Ye et al (2011) is the most cited study on user-generated content's impact on tourism, while Kim et al (2007) leads locally, followed by Ling et al (2014) and Chang et al (2019). Key topics include OTA attributes and consumer perception (Pan et al, 2012), pricing strategies (Ling et al, 2014), OTA quality (Chang et al, 2019), hotel-OTA cooperation (Ling et al, 2014; Chang et al, 2019), barriers to purchase intentions (Talwar et al, 2020), and consumer behavior (Pan et al, 2013). OTA research citations peaked in 2011 and 2020, with 2011 seeing the highest numbers. China leads contributions, followed by the U.S. and Spain.

4. Science Mapping and Coupling Analysis

A coupling map has two axes: centrality (x-axis) and impact (y-axis). Centrality, measured by Callon's Centrality index, identifies influential clusters, while impact is assessed using Mean Normalized Local Citation Score. The coupling analysis revealed three research themes: satisfaction (moderate centrality and impact), management (high centrality and impact), and service quality and behavior (low centrality and impact), as depicted in Figure 2. These themes encompass various subthemes.

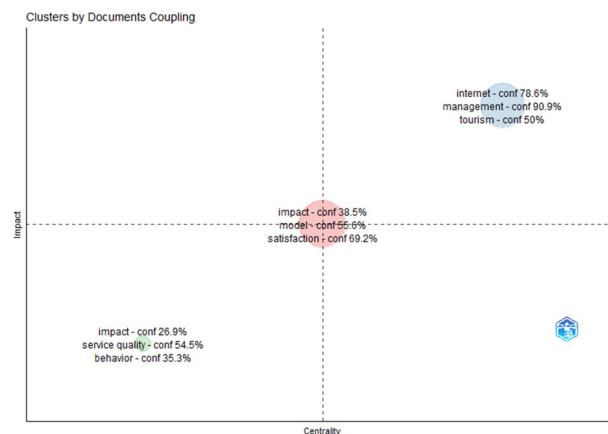


Figure 2: Coupling Map

4.1 Satisfaction

OTA satisfaction is determined by meeting online consumers' expectations for convenient travel service purchases (Table 1). Key subthemes include customer perception, value co-creation, innovation, brand perception, and loyalty. Subthemes were identified through qualitative analysis of clustered documents, focusing on the top influential papers in each cluster. Talwar et al (2020) and Chang et al (2019) provide the most notable contributions to understanding OTA satisfaction.

Table 1: The top ten influential papers in the Satisfaction theme

Study	Publication source	Local citation score	Purpose	Author Keywords	Key findings
Talwar et al. (2020)	International Journal of Hospitality Management	4.58	To extend the innovation resistance theory (IRT) to examine the barriers to positive purchase intentions toward OTAs	Consumer barriers; Hygiene consciousness; Innovation resistance theory (IRT); Purchase intentions; Resistance; Visibility	The benefits barrier primarily inhibits purchase intentions, while privacy and security concerns, along with the vulnerability barrier, positively influence them. Visibility moderates the relationship between the benefits barrier and purchase intentions, with this effect varying across age groups.
Chang et al. (2019)	Tourism Management	4	To investigate how OTAs and hotels cooperate and compete with each other at the same time in the multichannel environments.	Cooperation; competition; Online travel agency; hotel; O2O commerce	OTAs can attract new and returning customers through website service quality, while hotels rely on perceived value to attract returning customers. However, OTA website service quality negatively impacts the intention to rebook through hotel websites, and the intention to rebook through OTA and hotel websites is negatively correlated. Thus, these two channels compete for customers' future visits.
Chen & Kao (2010)	The Service Industries Journal	1.6	To conceptualizes e-service quality process quality and outcome quality - and explores the relationships between process quality, outcome quality, satisfaction, and behavioural intentions in the context of online travel agencies.	process quality; outcome quality; satisfaction; behavioural intentions; online travel agency	Process quality and outcome quality have significantly direct and positive effects on satisfaction. In addition, there exists a significant influence of satisfaction on behavioural intentions
Tsang et al. (2010)	Journal of Travel & Tourism Marketing	1.07	To explore the underlying dimensions used by online customers to evaluate the e-service quality of online travel agencies	E-service quality; online travel agency; website; perception	Factor analysis identifies six dimensions of e-service quality: Website Functionality, Information Quality and Content, Fulfillment and Responsiveness, Safety and Security, Appearance and Presentation, and Customer Relationship. Among these, Website Functionality, Information Quality and Content, Safety and Security, and Customer Relationship significantly influence overall satisfaction and repurchase intentions. Multiple regression analysis reveals that Website Functionality is the strongest predictor of customer satisfaction and repurchase intentions.
Liu et al. (2023)	SUSTAINABILITY-BASEL	1	To reveal the impact of tourist operant resources on online citizenship behavior from the perspective of interactions between tourists and online travel agencies (OTAs).	sustainable tourism; tourist operant resources; online citizenship behavior; knowledge distance; resource integration capability; value co-creation	Tourist operant resources are positively linked to online citizenship behavior, with perceived value (functional and emotional) partially mediating this relationship. Knowledge distance between tourists and OTA service personnel has an inverted U-shaped moderating effect on the link between tourist operant resources and functional value but does not affect the relationship with emotional value. Resource integration capability positively moderates the impact of tourist operant resources on both functional and emotional values.
Chen et al. (2023)	Journal of Theoretical and Applied Electronic Commerce Research	1	To explore the effect of price discrimination on the fairness perception toward reservation intentions. Also, to examine the interaction effects of the brand familiarity and the type of consumers on the fairness perception.	online hotel booking; fairness perception; price discrimination; brand familiarity; regulatory focus	Advantaged-price discriminations had higher fairness perceptions than equal-price discriminations, and that higher fairness perceptions had higher reservation intentions. The interaction effect of brand familiarity showed no significant impact on the fairness perceptions, while the regulatory focus had a mitigating effect on the price discrimination and on the fairness perceptions
Chu (2023)	Journal of the Knowledge Economy	1	To develop an academic framework for identifying the impact of business innovation practices on performance and firm survival strategies, and to understand the role of new technologies in mitigating the pandemic's effects and fostering sustainable business performance.	Innovative practices; Survival strategy; New technology adoption (digital transformation); Online travel agency (OTA); Coronavirus crisis	OTAs fill the gap in the free travel market with live-stream conferences offering flexible, innovative, and content-driven approaches. They can form strategic partnerships during crises to strengthen their competitive edge. Additionally, integrating AR/VR, AI, and big data enhances service quality, reduces information gaps, boosts travel security, and supports industry decentralization.
Kumar & Shankar (2023)	Australasian Marketing Journal	1	To investigate how consumers respond to online recovery strategies in response to a service failure in the OTAs context, and to examine the role of justice and forgiveness in the online service recovery process.	service failure; online travel agencies (OTA); justice; forgiveness; online service recovery strategies; repatronage behaviour	Response speed, explanation, courtesy and problem-solving are crucial online recovery strategies; Consumers' perceived justice and forgiveness play a crucial role in the online recovery process; Five solutions (i.e. various combinations of causal antecedents) could facilitate the formation of repatronage intention.
Li et al. (2023)	Heliyon	1	To investigate the experience and attention distribution of outbound tourists based on the two-factor theory.	Grounded theory; Hygiene factors; Motivational factors; Outbound tourists; Tourism experience	Outbound tourists prioritize motivational factors, such as interpersonal service attributes and inherent emotional components. These factors play a crucial role in stimulating travel motivation and crafting memorable experiences. Moreover, hygiene factors, like infrastructure and security conditions, also impact tourists' experiences and are crucial for reducing dissatisfaction among outbound travelers.
Khan et al. (2023)	Sustainability	1	To ascertain the leading attributes of selected travel websites based on sustainable e-service quality.	e-service quality; sustainable e-services; tourism websites; AHP; TOPSIS; sensitivity analysis	Security, hedonic value, and efficiency were the most important drivers of SESQ that influenced customers' selection of travel websites, and makemytrip.com was the most preferred travel website by customers.

4.1.1 Customer perception and satisfaction

E-service quality significantly influences OTA customer satisfaction, with website functionality emerging as the strongest predictor (Tsang et al., 2010). While service quality (Khan et al., 2023), perceived value (Liu et al., 2023), and website interactivity (Talwar et al., 2020) enhance customer perception, the role of service recovery (Kumar & Shankar, 2023) remains underexplored. Price and security are critical attributes (Kim et al., 2007), but evolving digital behaviors suggest a growing need to integrate hedonic and epistemic values beyond utilitarian benefits (Chen et al., 2022). Future research should examine how AI-driven personalization and omnichannel strategies shape OTA service experiences.

4.1.2 Value co-creation and innovation

Value co-creation in OTAs relies on stakeholder resource integration (Hughes et al., 2018), where tourists' functional and emotional value perceptions shape online engagement (Liu et al., 2023). While interpersonal service and hygiene factors remain priorities (Li et al., 2023), emerging technologies like AR/VR, AI, and big

data are redefining service quality and security (Chu, 2023). However, research lacks clarity on how these innovations reshape consumer expectations and long-term loyalty. Future studies should explore the balance between technology adoption and human interaction in value co-creation.

4.1.3 Brand perception and loyalty

Brand selection in OTAs is shaped by self-perception (Belanche et al., 2021) and familiarity (Chen et al., 2023), with sentiment playing a crucial role in brand attitudes (Chen et al., 2022). Factors like education, tourism spending, and travel frequency influence logo recognition (Godlewski & Zalech, 2022), while celebrity endorsements enhance trust (Qiu et al., 2021). However, fairness perceptions in price discrimination vary based on regulatory focus (Chen et al., 2023), raising questions about ethical pricing and long-term brand loyalty. Future research should examine sentiment-driven brand loyalty, cultural variations in celebrity endorsements, regulatory focus in pricing fairness, and the role of AI application in OTAs' brand loyalty.

4.2 Management

This theme (Table 2) explores the relationships between OTAs, hotels, and travel suppliers, focusing on pricing, revenue management, and distribution strategies that impact operations and profitability (Long & Shi, 2017; Kim et al, 2019).

Table 2: The top ten influential papers in the Management theme

Publication source	Local citation score	Purpose	Author Keywords	Key findings
Tourism Management	2.33	To study the optimal pricing strategies of a tour operator (TO) and an OTA when they achieve the O2O model through online sale and offline service cooperation.	Cooperation; Pricing strategies; O2O model; Tour operator; Online travel agency	Service level, unit sale commission, service cost coefficient and unit service compensation coefficient have different influences on the TO's and OTA's pricing decisions. When the unit sale commission is greater than the threshold, the TO's and OTA's pricing in the Bertrand game are higher than in the Stackelberg game. Being a leader is the dominant strategy for the TO.
Journal of Travel Research	2.08	To examine the effect of wide (vs. narrow) price dispersion on hotel preference, and to investigate two boundary conditions for this effect: salience of external regular price and perception of destination uncertainty.	price dispersion; reference pricing; online travel; online travel agent; hotel choice	Travelers prefer a hotel option featuring wide price dominance dispersion. Additionally, both the presence of an external regular price and the level of uncertainty associated with the hotel destination act as moderating influences.
Journal of Travel & Tourism Marketing	2	To examine the relationship status of leading OTAs with the hotel industry in the Asia Pacific (APAC) region along with future trends in hotel distribution channels.	Asia Pacific tourism intermediaries; inter-organizational relationship; online marketing distribution; online travel agents; travel market intermediaries	Building a long-term sustainable relationship with the hotel industry requires OTAs to be innovative and capable of enhancing their value to hotels. Moreover, the future of the hotel distribution landscape in the APAC region is expected to become increasingly complex.
Tourism Review	2	To determine whether different scales and ways to collect reviews and ratings found on OTAs can affect hotels, and whether hotels obtain the same or different evaluations.	Reviews; Hotel; Scores; Scale; Online travel agency (OTA)	Booking.com (2.5-10) and Agoda (2-10) give higher ratings than Atrapalo (1-10), Travel Republic (0-10), and hotel reservation service (1-10). When rescaled to 0-10, Booking.com and Agoda have the worst ratings. Customers often aren't aware of the rating scales, leading to lost information for hotels and OTAs. Overrated hotels can create unrealistic expectations for potential customers.
International Journal of Hospitality Management	1.96	To investigate how many channels hotels in Austria, Germany and Switzerland choose and what role the various channels play.	Distribution; Multi-channels; Internet distribution systems; Online travel agencies; Cluster analysis; Distribution strategy	Traditional channels like walk-ins and telephone remain important, but about one-fifth of bookings are made online. On average, 3.61 OTAs are used. The OTA market is oligopolistic, with Swiss and German hotels more dependent on OTAs than Austrian hotels. Cluster analysis identifies four distribution portfolio groups: multi-channel, electronic, real-time, and traditional distributors. These profiles help hotels learn from strategies based on characteristics like target group and star-rating.
Journal of Hospitality & Tourism Research	1.89	To provide insights into the complex landscape of online advertising channels to support tourism organizations in formulating their marketing strategies through search engine advertising and OTAs.	cost per click; online travel agencies; search engine marketing; web marketing	An analytical model is introduced to compare the profits generated from online search engines and online travel agencies. Assuming a trade-off between different online marketing channels, the study suggests the maximum cost per click that a tourism organization should pay to benefit from search engine marketing as much as from online travel agencies.
Tourism Management	1.86	To study the optimal pricing strategy of a hotel that establishes an online distribution channel through cooperation with an OTA.	Hotel pricing management; Tourism supply chain management; Online marketplace; Online travel agencies	(1) occupancy rate of a hotel before opening online marketing is an important metric for securing cooperation with an OTA; that is, a hotel with lower occupancy rates is more inclined to cooperate with an OTA to achieve an improvement in profits; and (2) a hotel is inclined to establish an online channel through an OTA with many online customers and/or few listed hotels.
Cornell Hospitality Quarterly	1.82	To explore the complexities of the consumer decision process beyond mere page position, in which hotels that appear near the top of the list of search results or an OTA page usually get more attention and hits than those showing up lower on the page.	hotel decision making; eyetracking; online travel agency; decision heuristics	Hotel rankings and web page position significantly influence attention. When overwhelmed by choices, people use price to narrow options. Including hotel images helps overcome information overload, making evaluations more thorough and enjoyable, and encouraging consideration of less prominent hotels. Recommendations include reducing options per page, using a nonlinear formula for conversion rates, and adding appealing images for hotels lacking other criteria.
International Journal of Contemporary Hospitality Management	1.68	To challenge the need for an over-optimization of channel strategy by proposing that the consumer, at the end, deals with a network of information presented on one networked environment, including the Web.	Hotels; Billboard effect; Multiple channel strategy; Online booking platforms; OTA	The estimated number of online bookings by the respondents in the hotels is a result of the number of channels, not the type of channel. This is particularly true for non-categorized establishments and one-and two-star hotels. The analyses do not confirm the billboard effect, according to which particular platforms (first-tier channels) increase the probability of bookings. Thus, the survival strategy is to maximize share of shelf and to build on interdependencies and network effects.
Tourism Management	1.6	To investigate various factors behind price discounts (as a type of price disparity) from a popular last-minute hotel deal app, HotelTonight, compared to major OTA websites for a better understanding of hotels' cross-channel pricing mechanisms.	Last-minute deal; Price disparity; Online reputation; HotelTonight	After controlling for other variables, price discounts are largely shaped by online reputation metrics (i.e., relative review valence and volume on TripAdvisor compared to on HotelTonight), complimentary access to services with high marginal variable costs, and uncertainty in the room type offered. However, hotels' market power does not explain price discounts.

4.2.1 OTAs' pricing strategies

OTA pricing strategies have evolved beyond simple discounts, incorporating price dispersion, external reference pricing, and time-limited offers (Choi & Mattila, 2017; Krishnan et al., 2013). Kim et al. (2019) argue that travelers prefer wide price dispersion when comparing hotels. Yet, the implications for perceived value and decision satisfaction remain underexplored. O2O collaborations show pricing variations based on service levels and commissions (Long & Shi, 2017). Higher reviews reduce last-minute discounts, while room type uncertainty increases discounts (Yang & Leung, 2018), but how these pricing mechanisms interact with consumer risk perceptions is not well understood. Price transparency remains a concern, as OTA prices fluctuate

near check-in and misalign with star ratings (Sun et al., 2015). While bundle pricing fosters loyalty, dynamic pricing reduces perceived fairness (Alderighi et al., 2022). Future research should explore how consumers navigate these complexities and how pricing transparency impacts decision confidence and brand loyalty.

4.2.2 Revenue management

Hotels balance direct bookings and OTA partnerships to manage room perishability (Hung et al., 2010), but the profitability of this reliance is debated. Cooperative strategies like demand forecasting and dynamic room availability improve revenue (Ling et al., 2015), though their long-term effects need further study. Hotels with lower occupancy rely more on OTAs, especially in markets with fewer listed hotels (Ling et al., 2014), yet the impact on brand positioning remains unclear. While optimal commission structures exist, research should further explore their influence on consumer trust, price fairness, and sustained revenue growth.

4.2.3 Distribution strategies

OTAs evolve distribution strategies through mobile platforms and hotel relationships (Yin et al, 2019). Online bookings grow, with 20% of bookings online. Distribution success depends on network effects, platform variety, and hotel ratings (Beritelli & Schegg, 2016), but the impacts of AI-driven pricing algorithms and personalized recommendations have not been explored. Consumers rely on visual cues and ratings (Pan et al., 2013; Leung et al., 2017), yet how these factors influence decision confidence and satisfaction remains debated. Further, the dominance of larger OTAs (Christodoulidou et al., 2010) underscores the necessity of effective channel coordination strategies to optimize cooperation and mitigate power asymmetries (Chen, 2023).

4.3 Service Quality and Consumer Behavior

The theme explores how OTAs' service quality impacts consumer perceptions, decision-making, and behavior. Table (3) showcases the top ten influential papers in this theme.

Table 3: Top ten influential papers in the Service Quality and Consumer Behavior theme

Study	Publication source	Local citation score	Purpose	Author Keywords	Key findings
Guo et al. (2022)	Current Issues in Tourism	1.89	To explore the relationship between OTA information and hotel room sales in the pandemic context (e.g. COVID-19), thereby promoting the recovery of hotel room sales.	COVID-19; crisis management; OTA information; room sales; quantile regression	The room sales of hotels with shorter operating years, higher quality amenities and services, and better brand image recovered faster during the pandemic. Moreover, the comparison between different types of cities suggests that hotels in tourism-oriented cities recovered faster than those in commerce-oriented ones, and the impacts of review rating of cleanliness and operating years have changed.
Hao et al. (2015)	Tourism Management	1.2	To understand customer preferences on different criteria for different segments, and to determine how customers obtain overall satisfaction across different criteria.	Genetic algorithm; Customer satisfaction; Online travel agency; Website evaluation; Smart tourism	Different customer segments have different opinions on the importance of various evaluation criteria. The results also reveal that customers tend to judge OTA websites in terms of certain important criteria, instead of by the weighted average of every factor concerned.
Ye et al. (2010)	Computers in Human Behavior	1.2	To identify the impact of online user-generated reviews on business performance using data extracted from a major online travel agency in China.	User-generated content; Traveler behavior; Hotel; Online bookings	Highlighting the importance of online user-generated reviews to business performance in tourism.
Rianthong et al. (2016)	Electronic Commerce Research and Applications	1.12	To develop a stochastic programming model to design the optimal sequence of hotels that enables customers to find hotels at the minimum search cost and maximum utility gained from hotels.	Hotel recommendation; Online hotel booking; Online review; Online travel agency; Multi-criteria decision; Multi-dimensional sequencing; Multi-preference consumer; Stochastic programming	A new approach called a two-stage stochastic programming (ZSSP) model for solving the optimal sequencing problem under the uncertainty of the customers was proposed. Hotels with a higher net utility, review rating, star rating, and price should be ranked in the upper positions of the sequence. However, when considering one-dimensional hotel attributes, a hotel with a higher review rating should be considered in the upper position because its result is close to that of the optimal sequence. The optimal number of choices should be decided strategically together with the quality of choices to balance search cost and utility gained from available hotels. The combining of attributes such as price, hotel star rating, and review rating in the search filters, makes a hotel more attractive relative to other hotels and increases its room bookings.
Ahmad & Sharma (2023)	Journal of Quality Assurance in Hospitality & Tourism	1	To apprehend travelers using the internet to search and book hotels on the OTA, and to find user satisfaction and intention to book the hotel by extending the information system success model.	Hotel booking intention; information system success model; tourism and hospitality; online satisfaction	Information satisfaction and service satisfaction significantly influence the online booking intentions.
Wu et al. (2023)	Current Issues in Tourism	1	To mine and analyze online reviews from online travel agency websites and social networking sites to comprehend a specific event of tourists' environmentally irresponsible behaviour, the Laojun Mountain 'Instant Noodle Crisis' in China, which has triggered widespread online discussion	Tourist environmentally irresponsible behaviour; online travel agencies; social networking sites; sentiment analysis; event system theory	(1) the evolutionary mechanisms of 'Instant Noodle Crisis' differ between OTA websites and social networking sites. (2) reviews on OTA websites focused on travel experiences and sights, with tourists rarely mentioned their own behavior. In contrast, reviews on social networking sites concentrated on blame-assigning and cause-seeking. (3) tourists' environmentally irresponsible behavior decreased positive feelings and increased negative emotions among tourists and the public.
Son & Park (2023)	Current Issues in Tourism	1	To investigate which features contribute more to predicting the user engagement with OTAs' Instagram posts	Transfer learning; Machine learning; Instagram; Online travel shopping; Online travel agency (OTA)	OTAs should emphasize the travel related emotion, luxurious, outdoorsy, and celebration in the post wordings in captions but should avoid the big words (words with more than six letters). In terms of images, it is recommended to use the image with fewer lines, fewer parallel lines, but more corners. For an Instagram message-delivering strategy, uploading a post during the evening is recommended.
Oumayma & Ez-Zohra, (2023)	Scientific African	1	To evaluate consumers' purchasing behavior through Online Travel Agencies (OTAs).	Purchase behavior (PB); Purchase intention (PI); Partial least squares structural equation; modeling (PLS-SEM); Fuzzy set qualitative comparative analysis; (FSQCA); Online travel agencies (OTAs)	Consumers' attitude, perceived relative advantages, communicability, and personal innovativeness ensure the purchasing intention and behavior among OTAs; and purchasing intention is a necessary condition for purchasing behavior of travel from OTAs.
Kim et al. (2023)	Tourism Management	1	To examine the effect of product quality and price sorting (vs. non-sorting) on extreme option choice aversion and identify the moderating effect of displays that made it difficult to read information.	Price; Quality; Online travel agency (OTA); Sorting effect; Extremeness aversion; Compromise effect; Choice architecture	The tendency to choose the non-extreme or middle-attributed options was stronger when quality and price were displayed sorted (vs. non-sorted). It was theorized that easy comparison of multiple options leads to decision-making. The positive effect of quality and price sorting on extreme option choice aversion was significantly reduced when customers had difficulty reading the displayed information.
Sun et al. (2023)	Sustainability	1	To understand the factors that influence accommodation consumption after COVID-19.	COVID-19 pandemic; signaling theory; online travel agency; hotel consumption; pandemic tourism	(1) completeness of information, online hygiene rating and hygiene recommendation tags have a significant impact on hotel consumption; (2) online hygiene rating has a positively significant moderating effect on the relationship between information completeness and hotel sales; and (3) there is variability in the factors that influence the generation and growth of hotel sales.

4.3.1 Consumer evaluation of OTAs' service quality

Consumers evaluate OTAs based on convenience, financial security, and price comparisons (Hao et al, 2015), but the evolving evaluation criteria, like real-time customer support provided by AI-powered chatbots, can be explored. Also, the relationships between such factors and the continuance usage intention, switching costs, and billboard effect can be investigated. To mitigate choice overload, OTAs rank hotels based on reviews and ratings (Rianthong et al., 2016), but the effectiveness of this system when tailored to consumer profiles remains uncertain. Additionally, exploring how travelers respond to concerns about algorithmic bias and rating manipulation is critical. Review helpfulness varies based on location, service, and review length (Son et al., 2022), while booking intentions are shaped by information accuracy and service quality (Ahmad & Sharma, 2023). For social media, OTAs should leverage travel emotions, use simple language, and post evening images with uncomplicated designs (Son & Park, 2023). However, the interaction between visual aesthetics, cultural preferences, and consumer engagement remains underexplored.

4.3.2 Consumer Behavior and Decision-Making through OTAs

Consumers' OTA booking intentions are driven by attitudes, perceived advantages, and personal innovativeness (Oumayma & Ez-Zohra, 2023). Reviews significantly influence bookings by reducing cognitive load (Ye et al, 2011), but concerns over fake content and reviews source credibility raise questions about their reliability. Post-COVID, information completeness and hygiene ratings have become key decision factors (Sun et al., 2023), reflecting shifting risk perceptions. However, the sustainability ratings have become a critical factor to be explored. Shorter-operating hotels with strong brands rebounded faster during the pandemic (Guo et al, 2022), which indicates research opportunity on the relationship between brand equity and crisis recovery. OTA website sorting by quality and price improves decision-making (Kim et al., 2023). OTA reviews focus on travel experiences, while social media reviews tend to assign blame (Wu et al, 2023), which can be considered in future research on OTAs' communication strategies.

5. Co-Citation Analysis of OTA Research

Co-citation analysis identifies disciplinary structure in OTA research by analyzing frequently co-cited studies (Shin et al, 2022). Figure (3) shows the co-citation network analysis with five major clusters.

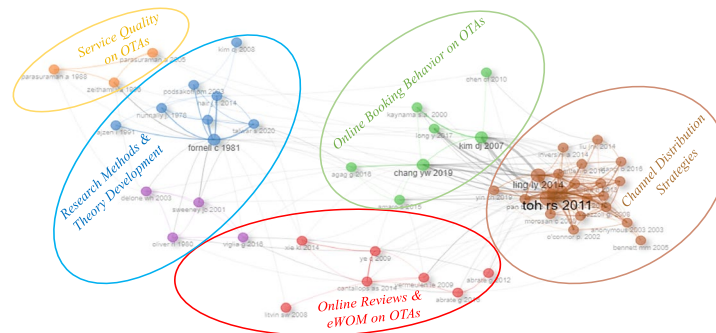


Figure 3: Co-citation network

Cluster 1. Online Reviews and eWOM on OTAs: Positive reviews boost online sales and hotel visibility (Ye et al, 2011). eWOM is a powerful, trusted marketing tool (Litvin et al, 2008). Both positive and negative reviews enhance awareness, requiring active reputation management (Vermeulen & Seegers, 2009). Loyalty programs and reviews foster repeat business (Xie et al, 2015). Review scores significantly impact occupancy rates, with each point increase contributing a 7.5% boost, though review impact diminishes over time (Viglia et al, 2016).

Cluster 2. Research Methods and Theory Development: Quantitative approaches like SEM (Fornell & Larcker, 1981; Anderson & Gerbing, 1988) and partial least squares are widely used. Consumer behavior studies employ theories of Planned Behavior, customer satisfaction, and Perceived Value. Critical focus areas include trust, perceived risk, security concerns, and user resistance to new technologies (Talwar et al, 2020).

Cluster 3. Online Booking Behavior on OTAs: Trust and user experience are critical, using Commitment-Trust Theory and Technology Acceptance Model to emphasize building trust and positive perceptions (Agag & El-Masry, 2016). Addressing security concerns and ensuring user-friendly interfaces reduce perceived risk (Chen & Chen, 2010). The E-QUAL framework helps assess service quality from the user's perspective (Kaynama & Black, 2000).

Cluster 4. Service Quality on OTAs: Studies represent service quality dimensions in the OTA context (Tsang et al, 2010). The SERVQUAL instrument assesses customer perceptions of service quality (Parasuraman et al., 1988). The link between service quality and customer loyalty is crucial for retention (Zeithaml et al, 1996). The E-S-QUAL and E-RecS-QUAL scales measure service quality on e-commerce sites and non-routine customer support needs (Parasuraman et al, 2005).

Cluster 5. Channel Distribution Strategies: Hotels benefit from multi-platform presence, enhancing visibility and consumer choice (Beritelli & Schegg, 2016). OTAs offer convenience and price comparison but impact profits due to commissions (Liu & Zhang, 2014). Social media and direct websites drive sales, requiring adaptation to new technologies and behaviors (Inversini & Masiero, 2014). Traditional intermediaries still serve certain segments (Law et al, 2015).

6. Co-Word Analysis of OTA Research

Co-word analysis in OTA research reveals evolving trends: "behavior", "trust", "satisfaction", and "loyalty" were key themes. Dominant trends included technology adoption, consumer perceptions, and service quality. "Consumer perceptions" and "service quality" gained attention from 2015-2020, while "experience" peaked during 2019-2021. "Behavior" emerged in 2013 and became a leading trend in 2022, with "trust" dominating from 2011-2021. Future research is expected to continue focusing on "behavior" and "trust".

7. Thematic Evolvement of OTAs Research

Themes are classified into motor, basic, emerging/declining, and niche groups (Cobo et al, 2011). As figure (4) illustrates, pricing strategy is a niche theme with practical relevance (Kim et al, 2019). Reviews and decision-making are motor themes, highlighting user reviews and persuasive content (Martin-Fuentes et al, 2021). Behavior, trust, and satisfaction are central topics in consumer research (Oumayma & Ez-Zohra, 2023). Distribution channels focus on consumer preferences and hotel-OTA strategies (Yang & Kim, 2022). Strategy and management are basic themes, important but underdeveloped, suggesting future research opportunities (Chu, 2023). Revenue management is fundamental, needing further exploration into hotel-OTA collaborations (Shi & Hu, 2021).

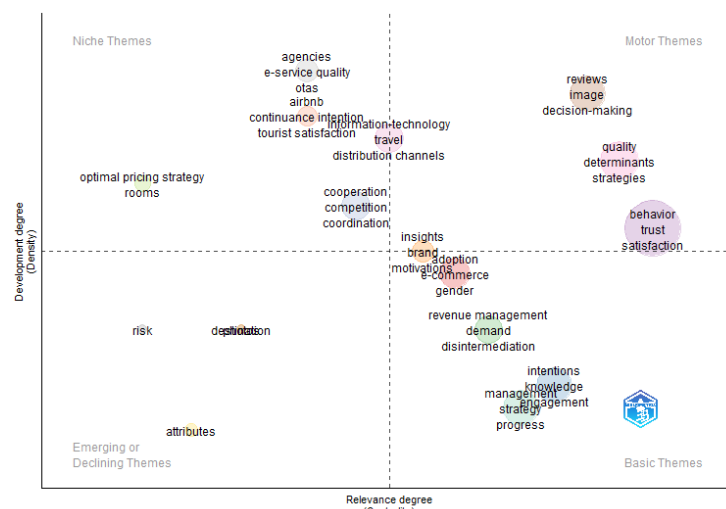


Figure 4: Thematic map

8. Limitations

The study's limitations include using only Web of Science, analyzing only reviewed articles, and focusing on English-language resources. Future research should use multiple data sources, include diverse publication types, evaluate resources in other languages, and explore specific OTA categories like flights, hotels, and tours.

References

- Abdullah, S., Van Cauwenberge, P., Bauwhede, H.V., and O'Connor, P. (2021) "The indirect distribution dilemma: assessing the financial impact of participation in Booking.com for hotels", *Tourism Review*, Vol. 77, No. 4, pp. 1024–1042.
- Agag, G., and El-Masry, A. (2016) "Understanding the determinants of hotel booking intentions and moderating role of habit", *International Journal of Hospitality Management*, Vol. 54, pp. 52–67.

- Ahmad, K., and Sharma, B.K. (2023) "Online Satisfaction and Hotel Booking Intentions: An Information System Success Model Perspective", *Journal of Quality Assurance in Hospitality & Tourism*, Vol. 1, No. 1, pp. 1–33.
- Alderighi, M., Nava, C.R., Calabrese, M., Christille, J.M., and Salvemini, C.B. (2022) "Consumer perception of price fairness and dynamic pricing: Evidence from Booking.com", *Journal of Business Research*, Vol. 145, pp. 769–783.
- Arksey, H., and O'Malley, L. (2005) "Scoping studies: Towards a methodological framework", *International Journal of Social Research Methodology*, Vol. 8, No. 1, pp. 19–32.
- Azazi, N.A.N., and Shaed, M.M. (2020) "Social media and decision-making process among tourists: A systematic review", *Jurnal Komunikasi: Malaysian Journal of Communication*, Vol. 36, No. 4, pp. 395–409.
- Belanche, D., Casaló, L.V., Flavián, M., and Ibáñez-Sánchez, S. (2021) "Understanding influencer marketing: The role of congruence between influencers, products and consumers", *Journal of Business Research*, Vol. 132, pp. 186–195.
- Beritelli, P., and Schegg, R. (2016) "Maximizing online bookings through a multi-channel-strategy", *International Journal of Contemporary Hospitality Management*, Vol. 28, No. 1, pp. 68–88.
- Chang, Y.W., Hsu, P., and Lan, Y.C. (2019) "Cooperation and competition between online travel agencies and hotels", *Tourism Management*, Vol. 71, pp. 187–196.
- Chen, C. (2023) "Advertising fee as a new supply chain coordination approach between hotels and online travel agencies", *Journal of Hospitality and Tourism Insights*.
- Chen, C., and Chen, F.S. (2010) "Experience quality, perceived value, satisfaction and behavioral intentions for heritage tourists", *Tourism Management*, Vol. 31, No. 1, pp. 29–35.
- Chen, J., Kamalanon, P., and Janupiboon, T.P. (2022) "Company websites and mobile apps versus social media: Which service experience creates more customer value for online travel agencies?", *Service Business*, Vol. 16, No. 4, pp. 1081–1110.
- Chen, X., Hyun, S.S., and Lee, T.J. (2022) "The effects of parasocial interaction, authenticity, and self-congruity on the formation of consumer trust in online travel agencies", *International Journal of Tourism Research*, Vol. 24, No. 4, pp. 563–576.
- Chen, Y., Pang, T., and Kuslina, B.H. (2023) "The effect of price discrimination on fairness perception and online hotel reservation intention", *Journal of Theoretical and Applied Electronic Commerce Research*, Vol. 18, No. 3, pp. 1320–1337.
- Choi, C., and Mattila, A.S. (2017) "The effects of internal and external reference prices on travelers' price evaluations", *Journal of Travel Research*, Vol. 57, No. 8, pp. 1068–1077.
- Christodoulidou, N., Connolly, D.J., and Brewer, P. (2010) "An examination of the transactional relationship between online travel agencies, travel meta sites, and suppliers", *International Journal of Contemporary Hospitality Management*, Vol. 22, No. 7, pp. 1048–1062.
- Chu, K. (2023) "Innovation practices of new technology adoption for the business survival strategy of online travel agencies during the COVID-19 pandemic: Two case studies in Taiwan", *Journal of the Knowledge Economy*.
- Cobo, M.J., López-Herrera, A.G., Liu, X., and Herrera, F. (2011) "An approach for detecting, quantifying, and visualizing the evolution of a research field: A practical application to the Fuzzy Sets Theory field", *Journal of Informetrics*, Vol. 5, No. 1, pp. 146–166.
- Fornell, C. and Larcker, D.F. (1981) "Evaluating structural equation models with unobservable variables and measurement error," *Journal of Marketing Research*, Vol 18, No. 1, pp 39–50.
- Garcia, G.M., Anjos, S.J.G.D., and Doğan, S. (2022) "Online travel agencies and their role in the tourism industry", *Advances in Hospitality and Tourism Research (AHTR)*, Vol. 10, No. 3, pp. 361–386.
- Godlewski, G. and Zalech, M. (2022) "Determinants of paying attention to the logos of online travel agencies", *Journal of Vacation Marketing*.
- Guo, L., Liu, K., Song, Y., and Yang, Z. (2021) "Recovering hotel room sales during the COVID-19 pandemic: Lessons from OTA information using the quantile regression approach", *Current Issues in Tourism*, pp. 1–21.
- Hao, J.-X., Yu, Y., Law, R., and Fong, D.K.C. (2015) "A genetic algorithm-based learning approach to understand customer satisfaction with OTA websites", *Tourism Management*, Vol. 48, pp. 231–241.
- Hughes, T., Vafeas, M., and Hilton, T. (2018) "Resource integration for co-creation between marketing agencies and clients", *European Journal of Marketing*, Vol. 52, No. 5/6, pp. 1329–1354.
- Inversini, A. and Masiero, L. (2014) "Selling rooms online: The use of social media and online travel agents", *International Journal of Contemporary Hospitality Management*, Vol. 26, No. 2, pp. 272–292.
- Kaynama, S.A. and Black, C.I. (2000) "A proposal to assess the service quality of online travel agencies: An exploratory study", *Journal of Professional Services Marketing*, Vol. 21, No. 1, pp. 63–88.
- Khan, M.N., Gupta, N., Matharu, M., and Khan, M.F. (2023) "Sustainable E-Service Quality in Tourism: Drivers Evaluation using AHP-TOPSIS technique", *Sustainability*, Vol. 15, No. 9, p. 7534.
- Kim, D.J., Kim, W.G., and Han, J.S. (2007) "A perceptual mapping of online travel agencies and preference attributes", *Tourism Management*, Vol. 28, No. 2, pp. 591–603.
- Kim, J., Franklin, D., Phillips, M., and Hwang, E. (2019) "Online travel agency price presentation: Examining the influence of price dispersion on travelers' hotel preference", *Journal of Travel Research*, Vol. 59, No. 4.
- Kim, J., Kim, S., Jhang, J., Lee, J.-S., and Koo, C. (2023) "Effects of price sorting display on extreme option choice aversion: The role of ease of comparison in multiple option displays", *Tourism Management*, Vol. 97, p. 104741.
- Krishnan, B.C., Dutta, S.K., and Jha, S. (2013) "Effectiveness of exaggerated advertised reference prices: The role of decision time pressure", *Journal of Retailing*, Vol. 89, No. 1, pp. 105–113.

- Kumar, A. and Shankar, A. (2023) "Why do consumers forgive online travel agencies? A multi-study approach", *Australasian Marketing Journal*.
- Law, R., Leung, R., Lo, A., Leung, D., and Fong, L.H.N. (2015) "Distribution channel in hospitality and tourism", *International Journal of Contemporary Hospitality Management*, Vol. 27, No. 3, pp. 431–452.
- Leung, X.Y., Sun, J., and Bai, B. (2017) "Bibliometrics of social media research: A co-citation and co-word analysis", *International Journal of Hospitality Management*, Vol. 66, pp. 35–45.
- Li, C., Deng, L., and Law, R. (2023) "Double blades: Does a sharing platform benefit from integration to a popular OTA platform?", *Journal of Travel & Tourism Marketing*, Vol. 40, No. 1, pp. 1–20.
- Li, T., and Zhu, Z. (2022) "A meta-analysis of online travel booking services adoption: The moderating effects of national or regional economic development level and culture differences", *Aslib Proceedings*, Vol. 75, No. 6, pp. 1209–1234.
- Li, X., Cui, W., and Chee, W.M. (2023) "Investigating tourism experiences and attention allocation of outbound tourists through the lens of the two-factor theory: A grounded theory analysis of Chinese tourists' travelogues in Malaysia", *Heliyon*, Vol. 9, No. 7, p. e17896.
- Ling, L., Dong, Y., Guo, X., and Liang, L. (2015) "Availability management of hotel rooms under cooperation with online travel agencies", *International Journal of Hospitality Management*, Vol. 50, pp. 145–152.
- Ling, L., Guo, X., and Yang, C. (2014) "Opening the online marketplace: An examination of hotel pricing and travel agency online distribution of rooms", *Tourism Management*, Vol. 45, pp. 234–243.
- Litvin, S.W., Goldsmith, R.E., and Pan, B. (2008) "Electronic word-of-mouth in hospitality and tourism management", *Tourism Management*, Vol. 29, No. 3, pp. 458–468.
- Liu, J.N.K., and Zhang, E.Y. (2014) "An investigation of factors affecting customer selection of online hotel booking channels", *International Journal of Hospitality Management*, Vol. 39, pp. 71–83.
- Liu, T., Ma, C., Xue, J., Li, G., and Lu, Q. (2023) "The impact of tourist operant resources on online citizenship behavior in sustainable tourism", *Sustainability*, Vol. 15, No. 23, p. 16148.
- Long, Y., & Shi, P. (2017). Pricing strategies of tour operator and online travel agency based on cooperation to achieve O2O model. *Tourism Management*, 62, 302–311.
- Lv, X., Li, N., Xu, X. and Yang, Y. (2020) "Understanding the emergence and development of online travel agencies: a dynamic evaluation and simulation approach", *Internet Research*, Vol 30, No. 6, pp. 1783–1810.
- Mariani, M.M. and Baggio, R. (2021) "Big data and analytics in hospitality and tourism: a systematic literature review", *International Journal of Contemporary Hospitality Management*, Vol 34, No. 1, pp. 231–278.
- Martin-Fuentes, E., Mellinas, J.P. and Parra-Lopez, E. (2020) "Online travel review rating scales and effects on hotel scoring and competitiveness", *Tourism Review*, ahead-of-print(ahead-of-print).
- Mokhtari, H., Barkhan, S., Haseli, D. and Saberli, M.K. (2020) "A bibliometric analysis and visualization of the Journal of Documentation: 1945–2018", *Journal of Documentation*, Vol 77, No. 1, pp. 69–92.
- Munn, Z., Peters, M.D.J., Stern, C., Tufanaru, C., McArthur, A. and Aromataris, E. (2018) "Systematic review or scoping review? Guidance for authors when choosing between a systematic or scoping review approach", *BMC Medical Research Methodology*, Vol 18, No. 1.
- Oumayma, L. and Ez-Zohra, B. (2023) "Predicting the antecedents of travelers purchase behavior through OTAs – A hybrid structural equation modeling with fuzzy set qualitative comparative analysis", *Scientific African*, Vol 20, e01618.
- Pan, B. (2013) "Bias error reduction of digital image correlation using Gaussian pre-filtering", *Optics and Lasers in Engineering*, Vol 51, No. 10, pp. 1161–1167.
- Pan, B., Zhang, L. and Law, R. (2012) "The Complex Matter of Online Hotel Choice", *Cornell Hospitality Quarterly*, Vol 54, No. 1, pp. 74–83.
- Parasuraman, A., Zeithaml, V.A. and Berry, L.L. (1988) "SERVQUAL: A Multiple-Item Scale for Measuring Consumer Perceptions of Service Quality", *Journal of Retailing*, Vol. 64, No. 1, pp. 12–40.
- Parasuraman, A., Zeithaml, V.A. and Malhotra, A. (2005) "E-S-QUAL: A Multiple-Item Scale for Assessing Electronic Service Quality", *Journal of Service Research*, Vol 7, No. 3, pp. 213–233.
- Qiu, L., Chen, X. and Lee, T.J. (2021) "How Can the Celebrity Endorsement Effect Help Consumer Engagement? A Case of Promoting Tourism Products through Live Streaming", *Sustainability*, Vol 13, No. 15, 8655.
- Rianthong, N., Dumrongsiri, A. and Kohda, Y. (2016) "Improving the multidimensional sequencing of hotel rooms on an online travel agency web site", *Electronic Commerce Research and Applications*, Vol 17, pp. 74–86.
- Shin, H.H., Shin, S. and Gim, J. (2022) "Looking back three decades of hospitality and tourism technology research: a bibliometric approach", *International Journal of Contemporary Hospitality Management*, Vol 35, No. 2, pp. 563–588.
- Son, H. and Park, Y.E. (2023) "Predicting user engagement with textual, visual, and social media features for online travel agencies' Instagram post: evidence from machine learning", *Current Issues in Tourism*, pp. 1–15.
- Son, Y., Kang, K., Choi, I. and Kim, J. (2022) "The Determinants of Helpful Hotel Reviews: A Social Influence Perspective", *Sustainability*, Vol 14, No. 22, 14881.
- Statista Search Department (2024, January 10th) "Online travel market - statistics & facts", *Statista*. <https://www.statista.com/topics/2704/online-travel-market/#topicOverview>
- Sun, C., Chai, X., Fan, Q. and Zhang, W. (2023) "The Impact of Hygiene Factors on Online Hotel Consumption in China during the COVID-19 Pandemic", *Sustainability (Basel)*, Vol 15, No. 4, 3537.
- Sun, S., Law, R. and Tse, T. (2015) "Exploring price fluctuations across different online travel agencies", *Journal of Vacation Marketing*, Vol 22, No. 2, pp. 167–178.

- Talwar, S., Dhir, A., Kaur, P. and Mäntymäki, M. (2020) "Why do people purchase from online travel agencies (OTAs)? A consumption values perspective", *International Journal of Hospitality Management*, Vol 88, 102534.
- Tsang, N.K., Lai, M.T.H., and Law, R. (2010) "Measuring e-service quality for online travel agencies", *Journal of Travel & Tourism Marketing*, Vol. 27, No. 3, pp. 306–323.
- Vermeulen, I. and Seegers, D. (2009) "Tried and tested: The impact of online hotel reviews on consumer consideration", *Tourism Management*, Vol 30, No. 1, pp. 123–127.
- Viglia, G., Minazzi, R. and Buhalis, D. (2016) "The influence of e-word-of-mouth on hotel occupancy rate", *International Journal of Contemporary Hospitality Management*, Vol 28, No. 9, pp. 2035–2051.
- Wu, H., Ke, X., Hu, T., He, B. and Xie, D. (2023) "'Instant Noodle Crisis': understanding tourist and public sentiments towards collective tourist environmentally irresponsible behaviour in a tourist destination in China", *Current Issues in Tourism*, pp. 1–19.
- Xie, K., Xiong, L., Chen, C. and Hu, C. (2015) "Understanding Active Loyalty Behavior in Hotel Reward Programs Through Customers' Switching Costs and Perceived Program Value", *Journal of Travel & Tourism Marketing*, Vol 32, No. 3, pp. 308–324.
- Yang, Y. and Leung, X.Y. (2018) "A better last-minute hotel deal via app? Cross-channel price disparities between HotelTonight and OTAs", *Tourism Management*, Vol 68, pp. 198–209.
- Ye, Q., Law, R., Gu, B. and Chen, W. (2011) "The influence of user-generated content on traveler behavior: An empirical investigation on the effects of e-word-of-mouth to hotel online bookings", *Computers in Human Behavior*, Vol 27, No. 2, pp. 634–639.
- Yin, C.H., Goh, E. and Law, R. (2019) "Developing inter-organizational relationships with online travel agencies (OTAs) and the hotel industry", *Journal of Travel & Tourism Marketing*, Vol 36, No. 4, pp. 428–442.
- Zeithaml, V.A., Berry, L.L. and Parasuraman, A. (1996) "The behavioral consequences of service quality", *Journal of Marketing*, Vol 60, No. 2, pp. 31.
- Zhu, Y., Zhang, R., Zou, Y. and Jin, D. (2023) "Investigating customers' responses to artificial intelligence chatbots in online travel agencies: the moderating role of product familiarity", *Journal of Hospitality and Tourism Technology*, Vol 14, No. 2, pp. 208–224.

Non Academic Papers

Titanic Challenge: Ethical Dilemmas in Deep Sea Exploration

Melvin Marsh

Extreme Environments Psychology and Medicine Consulting, LLC, Hollywood, Florida, USA
Alabama State University, Montgomery, Alabama, USA

mmarsh@alasu.edu

Abstract: Deep sea tourism, which offers unparalleled access to the ocean's abyss, presents a complex ethical and environmental challenge. Certainly, the allure of exploring the unknown is undeniable, but the potential consequences for marine ecosystems are profound. Commercialization, driven by profit motives, can overshadow the delicate balance required for responsible exploration. Submersible operations, while essential for exploration, introduce risks of habitat disturbance, pollution, and various contamination. The potential for human error, equipment malfunction, and accidents, as tragically illustrated by the Titan submersible disaster, highlights the need for rigorous safety protocols and emergency preparedness. Moreover, the psychological impact of operating in extreme environments on both tourists and crew members is a critical yet often overlooked concern. Ethical considerations extend beyond environmental protection and human safety. The distribution of benefits from deep sea tourism must be equitable, with local communities and conservation efforts receiving their fair share. Questions arise regarding the rights of future generations to experience and benefit from pristine marine environments. Additionally, the commercialization of such unique experiences may raise concerns about accessibility and affordability.

Keywords: Extreme tourism, Deep sea tourism, Ethics, Deep sea exploration, Environmental science

1. Introduction

Deep-sea diving, while sharing the inherent risks of high costs and danger common to other extreme tourism activities, carries additional unique concerns. These include a heightened risk of habitat disturbance, pollution, and other forms of contamination, as well as the potential to damage or destroy valuable scientific and historical sites.

All of this was made clearer by the tragic implosion of Oceangate's Titan submersible in June 2023, which serves as a stark reminder of the potential for catastrophic consequences when safety is compromised. The Titan's catastrophic failure was largely attributed to CEO Stockton Rush's disregard for safety concerns, allegedly calling them "pure waste" (Smith-Schoenwalder, 2023). This disregard for safety ultimately led to the tragic loss of five individuals, including Rush himself. While Oceangate is only just starting to face legal repercussions, the intense public scrutiny has ignited crucial conversations about safety regulations and ethical considerations within the deep-sea diving sector.

Deep-sea diving falls under the umbrella of "adventure tourism," a rapidly growing niche sector encompassing a range of activities with varying levels of risk. "Soft adventure" activities, such as snorkelling and hiking, pose relatively low risks, while "hard adventure" activities, including rock climbing and polar exploration, demand higher skill levels and carry greater inherent dangers (Janowski et al., 2021, Zaid et al., 2023). Deep-sea diving, with its immense pressures and the potential for equipment malfunctions, undeniably resides within the "hard adventure" category even if one is in a craft such as a submersible.

Despite the burgeoning popularity of adventure tourism, the ethical and legal frameworks surrounding its riskier aspects remain largely underdeveloped. Deep-sea diving, with its inherent dangers and the potential for catastrophic outcomes, warrants significant academic attention, yet it remains largely understudied. While some research has explored the ethical dilemmas of space tourism (Marsh, 2006, Marsh, 2010) and general extreme tourism in general (Marsh, 2024), a comprehensive examination of the ethical and legal considerations specific to deep-sea diving is urgently needed.

2. Ethical Considerations

2.1 Human Safety

While the risks of self contained underwater breathing apparatus (SCUBA) diving are well known, and include decompression sickness, nitrogen narcosis, equipment malfunctions, barotrauma, and cold water exposure (Germonpré, 2006), fewer individuals may consider the challenges of deep sea diving in a submersible.

Deep-sea submersible operations present a unique set of risks. Similar to SCUBA, equipment failures, such as malfunctions in life support systems, propulsion, or communication systems, pose a significant threat. The extreme pressure and unforgiving environment of the deep sea can exacerbate these risks, making even minor

malfunctions potentially catastrophic. Accidents, including collisions with underwater objects, entanglement in debris, or unforeseen environmental factors, can have devastating consequences. The remote nature of deep-sea operations often complicates rescue efforts, increasing the potential for loss of life. The psychological impact on both tourists and crew members must not be underestimated. The confined space, the isolation, and the constant awareness of the immense pressure surrounding the submersible can induce anxiety, claustrophobia, and even panic attacks (Marsh, 2024). However, unlike SCUBA divers who must go through training and classes to be aware of these risks, passengers on a submersible are simply that... passengers which may or may not have experience in high stress environments.

2.2 Environmental Impacts

Deep-sea tourism also raises concerns about its potential impact on the environment in general and in scientific and archaeological research in particular. Submersible operations, while offering unparalleled access to the deep sea, also carry a heightened risk of environmental impact.

Deep-sea tourism activities, such as submersible dives and recreational scuba diving, can inadvertently disturb habitats which also serve as delicate research sites (Milazzo et al., 2002). These sites may contain valuable scientific data, including information on biodiversity, geological processes, and climate change. The presence of tourist vessels, the deployment of equipment, and even the subtle effects of light and noise pollution may disrupt ongoing research and compromise the integrity of scientific findings. The very act of human presence, whether it's recreational divers stirring up sediment (Milazzo et al., 2002) or deep sea mining (Willaert, 2021) can disrupt delicate deep-sea communities. These ecosystems, often characterized by slow growth and long lifespans, are particularly vulnerable to disturbance.

Deep-sea ecosystems harbour a remarkable diversity of life, many of which are yet to be discovered. The presence of tourists, even with the best intentions, can inadvertently disturb or even harm these unique organisms. The risk of accidental contact, entanglement in equipment, or the introduction of diseases are all potential threats to deep-sea biodiversity. The sheer size of submersibles and the potential for mechanical failures increase the risk of physical damage to fragile habitats like deep-sea coral reefs or hydrothermal vents. Additionally, the noise generated by submersibles can disrupt the communication and behaviour of marine animals, potentially impacting their feeding, mating, and navigation patterns.

Pollution which could spread further than the original location can pose another significant threat. Small submersibles, despite technological advancements, can still release minute amounts of particles or fluids into the water when conducting science or during a catastrophic event such as an implosion (Schmaltz et al., 2020). Implosions, of course will also contribute to a buildup of debris, further impacting the delicate balance of these ecosystems. Larger vehicles like nuclear submarines, may further leak radiation into the ocean (Diniz Costa, 2017).

Deep-sea tourism can compete with scientific research for access to limited resources, such as research vessels, specialized equipment, and skilled personnel. This competition can hinder scientific progress and limit our understanding of the deep sea. The deep sea also harbours numerous archaeological sites, including shipwrecks and ancient human settlements. Oceangate's Titan was going to explore the wreck of the Titanic before it imploded. Deep-sea tourism activities can inadvertently damage these sites, destroying valuable historical and cultural artifacts.

2.3 Equity and Accessibility

Another ethical consideration of deep-sea tourism includes the equitable distribution of benefits and the preservation of these unique environments for future generations. It is important to assure that the economic benefits of deep-sea tourism are fairly distributed among local communities and ensure that local businesses and residents receive a fair share of the economic gains. This can be achieved through initiatives like employing local guides, sourcing local supplies, and reinvesting tourism revenue into community development projects.

Additionally, it may also be important to consider accessibility and affordability. Deep-sea tourism, particularly submersible expeditions, can be expensive, effectively excluding most people. Efforts should be made to explore innovative models for making these experiences more accessible, such as developing more affordable options, offering scholarships and subsidies, and promoting community-based tourism initiatives.

Finally, the ethical imperative to protect the rights of future generations to experience and benefit from pristine marine environments cannot be overstated. Deep-sea tourism must be conducted in a sustainable

manner that minimizes environmental impact and preserves the integrity of these unique ecosystems for future generations. This requires a commitment to responsible tourism practices, including minimizing disturbance to marine life, preventing pollution, and supporting marine conservation efforts.

3. Regulatory Framework

3.1 Environmental Regulations - BBNJ Agreement

Until recently, there were no environmental regulations which regulated the environmental impact of high

Seas (200 miles or more from the coast) and the international deep seabed. Monitoring and mitigating environmental damage in the deep sea can present significant challenges.

In June 2023, the international community came together to pass the “Agreement under the United Nations Convention on the Law of the Sea on the Conservation and Sustainable Use of Marine Biological Diversity of Areas Beyond National Jurisdiction” (Lothian, 2023). The BBNJ Agreement, as it is known more commonly, is aimed at protecting the biodiversity of the high seas, the vast areas of the ocean beyond national jurisdiction. By providing a legal framework for the conservation and sustainable use of marine biodiversity in the high seas, it offers hope for the long-term health of our oceans and the many benefits they provide to humanity and tackles legally some of the ethical concerns mentioned above.

The following are the four key elements in the BBNJ Agreement

- **Marine Genetic Resources Including the Fair and Equitable Sharing of Benefits:** The Agreement establishes a mechanism for sharing both monetary and non-monetary benefits, including access to research and technology, capacity building, and support for sustainable development in developing countries.
- **Establishing Marine Protected Areas (MPAs):** The agreement enables the creation of MPAs in the high seas to conserve and protect vulnerable marine ecosystems.
- **Environmental Impact Assessments:** It requires countries to conduct Environmental Impact Assessments for activities that may have significant adverse impacts on marine biodiversity. This includes deep sea diving, submersible operations, and deep sea mining
- **Capacity Building and Technology Transfer:** The agreement emphasizes the importance of supporting developing countries in implementing the treaty through capacity building and technology transfer.

The BBNJ Agreement represents a significant step towards a more sustainable and equitable use of the high seas, ensuring their conservation for present and future generations.

3.2 Safety Standards

Deep-sea submersible operations demand the highest safety standards to mitigate the inherent risks associated with operating in the extreme and unforgiving deep-sea environment, however, there are few requirements in this often self-regulating industry. These standards should encompass a multifaceted approach encompassing equipment maintenance, comprehensive crew training, and well-defined emergency procedures. Some of these protocols should include but not limited to the following:

- **Meticulous Equipment Inspections:** Regular and thorough inspections of all critical components, including the pressure hull, life support systems, propulsion systems, and communication systems, are paramount. This includes non-destructive testing, material analysis, and functional checks to ensure the integrity and reliability of all equipment. Due to their usual presence in the high seas and being oftentimes designated as an “experimental” craft, can allow submersibles to forgo recommended, but not required, certifications. Manned submersibles, particularly carrying passengers, should be certified to the intended depth or should not be permitted to continue.
- **Preventative Maintenance:** A proactive maintenance schedule is important to identify and address potential issues before they can escalate. This may involve regular servicing, component replacements, and system upgrades to incorporate the latest safety technologies.
- **Extensive Training Programs:** Pilots, crew members, and even passengers should undergo rigorous and comprehensive training programs in the even of an emergency. This training should cover:
- **Submersible Systems:** *In-depth knowledge of the submersible's systems, including navigation, communication, life support, and emergency procedures.*
- **Emergency Response:** *Comprehensive training on emergency procedures, including fire, flooding, loss of power, and medical emergencies. Included in this is medical preparedness, which means ensuring*

adequate medical supplies and trained personnel on board is crucial. The remote nature of deep-sea environments necessitates a high degree of self-reliance in medical emergencies. This is important even if the trip is only expected to be a few hours in length.

- **Psychological Preparedness:** Addressing the psychological challenges of operating in a confined and potentially stressful environment, such as claustrophobia and anxiety.
- **Contingency Plans:** Developing and regularly reviewing comprehensive contingency plans for various emergency scenarios, including loss of communication, equipment malfunctions, and medical emergencies.
- **Emergency Communication Systems:** Ensuring reliable and redundant communication systems to facilitate timely emergency response. Establishing clear and concise communication protocols between the dive team, surface support personnel, and emergency response agencies includes the use of redundant communication systems, designated emergency frequencies, and pre-arranged contact procedures
- **Rescue and Recovery Protocols:** Establishing clear and well-rehearsed rescue and recovery protocols in collaboration with relevant authorities and other stakeholders. This should include access to trained and equipped emergency response teams, including skilled divers, medical personnel, and specialized rescue vessels, is critical. These teams should be readily available and capable of responding swiftly to incidents.
- **Technological Advancements:** Continuous research and development of advanced safety technologies, such as real-time monitoring systems, improved communication systems, and more robust hull designs, are crucial for mitigating risks before they become problematic. Further, utilizing advanced technologies such as underwater acoustic positioning systems, remotely operated vehicles (ROVs), and underwater communication systems can significantly enhance search and rescue efforts.
- **Collaboration and Coordination:** Effective coordination among various stakeholders, including government agencies, maritime authorities, and private operators, is essential for successful rescue operations. This requires clear lines of communication, shared information, and a unified command structure.

4. Conclusion

Deep-sea diving, while sharing the inherent risks of high costs and danger common to other extreme tourism activities, carries additional unique concerns. These include a heightened risk of habitat disturbance, pollution, and other forms of contamination, as well as the potential to damage or destroy valuable scientific and historical sites. All of this was tragically underscored by the implosion of Oceangate's Titan submersible in June 2023, highlighting the potential for catastrophic consequences when safety is compromised. This event ignited crucial conversations about safety regulations and ethical considerations within the deep-sea diving sector.

Deep-sea submersible operations present a unique set of risks. Equipment failures, accidents, and the psychological impact on both tourists and crew members, including anxiety, claustrophobia, and potential for panic attacks, pose significant threats. While the risks of SCUBA diving are well-known, the unique pressures and confined space of a submersible create a distinct set of psychological challenges for passengers who may not be used to confined environments. Addressing these challenges requires a multifaceted approach. Robust safety regulations are crucial, encompassing rigorous equipment maintenance, comprehensive crew training, and well-defined emergency procedures. Continuous research and development of advanced safety technologies, such as real-time monitoring systems and improved communication systems, are essential.

Deep-sea tourism activities can also have significant environmental impacts. Submersible operations can disturb delicate ecosystems, damage research sites, and contribute to pollution. The presence of tourists can disrupt marine life and potentially damage archaeological sites. The BBNJ Agreement, while primarily focused on the conservation and sustainable use of marine biodiversity in the high seas, provides a valuable framework for responsible ocean stewardship. Its provisions for environmental impact assessments and the equitable sharing of benefits from marine genetic resources can inform the development of regulations for deep-sea tourism. Furthermore, conducting thorough and independent Environmental Impact Assessments is crucial to assess potential impacts and implement appropriate mitigation measures. Prioritizing scientific research and conservation efforts is essential to ensure the long-term sustainability of deep-sea ecosystems.

Raising public awareness about the unique and fragile nature of the deep sea and the importance of responsible tourism is crucial. Engaging the public through educational programs, media outreach, and citizen

science initiatives can foster a deeper understanding and appreciation for the ocean and empower individuals to become active participants in ocean conservation efforts.

Finally, fostering ongoing dialogue and collaboration among governments, researchers, industry stakeholders, and conservation organizations is vital for effective regulation, research, and the development of best practices for sustainable deep-sea tourism assuming it is permitted to continue. By addressing these challenges and implementing a comprehensive framework for responsible and sustainable deep-sea tourism, we can strive to ensure that these unique and awe-inspiring experiences are enjoyed responsibly while safeguarding the health of our oceans for future generations.

References

- Diniz Costa, E. P. L. 2017. Brazil's Nuclear Submarine: A Broader Approach To The Safeguards Issue. *Revista Brasileira De Política Internacional*, 60, 1-20.
- Germonpré, P. 2006. The Medical Risks Of Underwater Diving And Their Control. *International Sportmed Journal*, 7, 1-15.
- Janowski, I., Gardiner, S. & Kwek, A. 2021. Dimensions Of Adventure Tourism. *Tourism Management Perspectives*, 37, 100776.
- Lothian, S. 2023. The Bbnj Agreement: Through The Prism Of Deep-Sea Vulnerable Marine Ecosystems. *Ocean Development & International Law*, 54, 469-499.
- Marsh, M. S. 2006. Ethical And Medical Dilemmas Of Space Tourism. *Advances In Space Research*, 37, 1823-1827.
- Marsh, M. S. 2010. Ethical Issues Regarding Informed Consent For Minors For Space Tourism. *Aip Conference Proceedings*, 1208, 438-442.
- Marsh, M. S. 2024. Ethical And Medical Dilemmas Of Extreme Tourism. In: Balkaran, R. & Hattingh, C., Eds. 7th International Conference On Tourism Research., March 18 - 19 2024 Cape Town, South Africa. 197-202.
- Milazzo, M., Chemello, R., Badalamenti, F., Camarda, R. & Riggio, S. 2002. The Impact Of Human Recreational Activities In Marine Protected Areas: What Lessons Should Be Learnt In The Mediterranean Sea? *Marine Ecology*, 23, 280-290.
- Schmaltz, E., Melvin, E. C., Diana, Z., Gunady, E. F., Rittschof, D., Somarelli, J. A., Virdin, J. & Dunphy-Daly, M. M. 2020. Plastic Pollution Solutions: Emerging Technologies To Prevent And Collectmarineplastic Pollution. *Environment International*, 144, 106067.
- Smith-Schoenwalder, C. 2023. Despite 'Titan' Submersible's Fatal Wreck, Extreme Tourism Among The Ultra Wealthy Isn't Going Away. *U.S. News & World Report - The Report*, C8-C11.
- Willaert, K. 2021. Protest At Sea Against Deep Sea Mining: Lawfulness, Limits And Remedies. *International Journal Of Marine & Coastal Law*, 36, 672-683.
- Zaid, S., Abadi, S. Y. & Kamaluddin, M. 2023. Adventure Tourism Risk, Environmental Image, And Revisit Intention: An Empirical Study Of Underwater Cave Diving Tourism In Buton Island, Indonesia. *Tourism And Hospitality Management*, 29, 15-24.

Work in Progress Paper

Adopting Social Media Influencers in Boutique Hotel Marketing: A Case Study

Norman Au and Hailey Shin

School of Hotel and Tourism Management, The Hong Kong Polytechnic University, Kowloon, Hong Kong

norman.au@polyu.edu.hk

hailey.shin@polyu.edu.hk

Abstract: Opinions posted by popular social media influencers (SMI) impose significant influences on brand equity and subsequent purchases. From the in-depth interview with Hotel A, the current practises between the hotel and SMI were explored. It provides a useful background for developing effective instruments for the next stage of study.

Keywords: Social media influencer, Hotel marketing, Boutique hotel, Hong Kong

1. Introduction

Travelers nowadays are increasingly seeking travel-related information from various social media channels such as YouTube (Kapoor et al., 2021). Following the trends, many tourism service providers are increasingly adopting social media channels for their product promotion and relationship building with their current and potential customers (Szymkowiak et al., 2021). Tourism industry is heavily affected by influencer marketing due to the intangible nature of tourism products, which cannot be tested or felt before their purchase and consumption. Hence, using influential people in social media, so-called social media influencers (SMI), to recommend products and brands is evidently more effective in persuading followers or prospective customers to share information with others or make subsequent purchases than using traditional advertising formats (Colliander & Dahlén, 2011).

It is not necessarily true that information disseminated by sponsored SMI is less credible than that of those who are not sponsored. When the contents contain no negative views on the product or service concerned, it may often be perceived by viewers as sponsored posts. As SMI stamp their posts also with their personal aesthetic touches and personality twists, whether the “informative” value of the post will affect the credibility of the influencer remains controversial. It is also not yet clear how the design and contents of the post will be more persuasive to viewers in affecting their subsequent behavior. Depending on the local cultural environment of a destination and the agreement between the SMI and the hotel company, the charisma of the SMI may be good enough to override everything, and his or her endorsement alone on specific product aspects could be sufficient to influence purchasing behavior of followers. The main objectives of the research are to firstly explore the normal practice of the hotels with SMI, then identify what elements in the SMS content design post and evaluate how these elements might affect perceived information credibility and their subsequent behavior.

2. Literature Review

2.1 Characteristics of SMI

Social media influencers (SMIs), or sometimes called key opinion leaders (KOLs), refer to people who have built a reputation for their knowledge and expertise on a specific topic. SMIs are independent third-party endorsers who shape audience attitudes by creating and sharing brand-related content on their personal social media channels (Ge & Gretzel, 2018). Influencers can be divided into different types. The most common methods are by follower numbers, types of content, and level of influence. SMIs’ messages can be sponsored or non-sponsored, depending on whether SMIs receive monetary or other forms of compensation from a company. Social media influencer marketing is becoming more popular in the hospitality industry due to its high return on investment provided appropriate influencers are selected (Sun et al., 2021). Many of these posts are sponsored by a brand, while others are in the form of genuine advice. Influencers might choose to add a disclosure (“this is not sponsored content”) in non-sponsored product posts that highlight their impartiality. It is also often preferred by independent restaurant owners because of its low cost, wide reach, and high interactivity (Needles and Thompson, 2013). By providing free meals, these influencers endorse the restaurants by sharing their experiences with their followers via social media platforms, though it is expected the posted comments would normally be positive (Leung et al. 2022).

2.2 Impact of SMI marketing on Hotel and Restaurant Business

The rise of SMI has significantly transformed the landscape of marketing, particularly within the hotel and restaurant businesses. Hotels and restaurants have increasingly leveraged the reach and persuasive power of influencers to enhance brand visibility through visually appealing content, engage with potential customers, and drive sales. Such practice is particularly valuable for smaller establishments seeking to compete with larger chains. Prior research by De Veirman et al. (2017) suggests that influencer endorsements can lead to higher conversion rates, as followers are more likely to trust and act upon recommendations from influencers they admire. As such, spending on influencer campaigns has surged significantly worldwide since 2016, and is expected to reach a global total of 22.2 billion U.S. dollars by 2025 (Statista, 2024). Nevertheless, Bentley (2024) discovered that partnering with SMIs in social media posting (as opposed to posts originated from the brand) could be perceived as a norm violation for consumers with a high brand attachment, which negatively impacts brand equity and consumption intentions.

2.3 Social Media Posting Contents and its Impacts

Though SMIs have the potential to spread awareness and stimulate the purchase intention of viewers and followers, not all posts are equally effective. The visual design, such as high-quality images and videos with appealing aesthetics, is likely to enhance viewers' engagement more than just presented in pure textual information. A study by Cascio Rizzo (2024) revealed that high-arousal language triggers positive responses with micro-influencers, yet it backfires with macro-influencers. For macro-influencers, using overly high-arousal language such as "totally amazing" will be perceived as less trustworthy and less "genuine." The message is more associated with advertisement intention. Apart from the wording used, it is discovered the information disclosure types (sponsorship information) also affects the perceived credibility of the message content and resulting purchase intention (Stubb and Colliander, 2019).

3. Research Methods

The whole study involves two main stages. In this first stage, one-hour in-depth interview was conducted with a hotel marketing manager of a boutique hotel (named Hotel A) in Hong Kong with 250+ rooms to explore the current practice on how the hotel works with SMI in product promotion. In the next stage, the study will conduct scenario-based between-subject experiments. After filtering questions, the participants will be asked to think of a specific influencer they follow during the online survey. They will be randomly assigned to one of the scenarios, which will be developed based on actual influencers' postings learned from the stage one interview. Once the participants read through the given scenario, a series of manipulation check items will be provided, followed by the measurement items for the constructs of interest. The survey will end with questions asking about the participants' socio-demographic information. Descriptive statistics will be assessed to ensure the assumptions. Once the results show a satisfactory manipulation of the constructs, the main hypotheses will be tested through a series of omnibus tests and post-hoc analyses using R.

4. Findings and Discussion

4.1 Selection of SMI

In Hotel A, SMI marketing is mainly adopted in the promotion of "rooms" and "food and beverage" selling. For the former, international influencers are normally employed to attract non-local customers. Whereas local influencers are used in the later in order to target local customers. On average, a total of 20 influencers are invited each month. Apart from scanning from the international influencer list provided by the Hong Kong Tourism Board, the source of international SMI often based on self-searching from various popular social media sites, such as Instagram. For local SMI, preferences will be given to those that the hotel has employed before or referrals from other hotels. In some cases, referral could come from other SMI met in other various hotel events. Usually, SMI with similar backgrounds such as age group, cultural characteristics, style etc. with the target customer group are considered for invitation. Other selection criteria include the number of likes/followers/engagements/views", style of the influencer, and history of posted contents. Tools such as Social Blade are used to check the authenticity of the contents. The aim of using SMI is mainly for soft promotion in creating product awareness rather than hard sales.

4.2 Arrangements with SMI

SMIs are generally given creative freedom, with no rigid guidelines on the photos they should take, the language they should use, what contents they should cover in their posts, post length, or the timing and method of

promotion. This approach allows influencers to maintain their unique style, which is crucial for attracting their audience. SMIs are usually provided with general information about the hotel, either through press releases or a hotel tour. They might be encouraged to highlight specific features such as the sea view from rooms, sustainability practices, and taste and pricing of food. Food and beverage promotions often require more urgent attention to avoid missing promotional deadlines. There may be some negotiation regarding content format, especially for room promotions. This is due to the limited availability of rooms at Hotel A and the restricted opportunities for influencers to visit multiple times. Such negotiations might involve the number of posts to be uploaded. SMIs are provided with specific hashtags to use in their posts.

Interestingly, no formal contracts are signed, and no monetary compensation is offered, which means influencers do not need to declare their content as "sponsored." Despite the lack of financial incentives, influencers are expected to promote the hotel in exchange for the usual perks. Failure to do so might lead to being "blacklisted," although this is rare due to influencers' concerns about maintaining their reputation. The hotel manually checks the content posted by invited influencers to ensure compliance. The primary benefit for influencers in promoting hotel products is the enhancement of their profiles, which can aid in future promotions. While restaurants and other product influencers are typically paid for social media promotions, with fees ranging from several thousand to over ten thousand HK dollars, hotels often have greater bargaining power. This allows them to forgo providing financial incentives to influencers.

5. Conclusion

Overall, using SMI as a marketing tool is very important to Hotel A due to the high popularity of Instagram in affecting potential customers. There is no strict KPI on SMI evaluation, as the purpose for hiring SMI is for "soft" promotion rather than ROI focus. Occasionally, the hotel will ask customers directly on the attractiveness of SMI posted contents.

Acknowledgements

This project is fully supported by Hotel ICON Research Fund (Project ID/Account: P0043569/4ZZNS)

References

- Bentley, K., Rajagopal, P. & Kulow, K. (2024) "Unfaithful Brands: How Brand Attachment can Lead to Negative Responses to Influencer Marketing Campaigns", *Journal of Consumer Psychology*. <https://doi.org/10.1002/jcpy.1432>.
- Cascio Rizzo, Giovanni Luca, et al. (2024) "How High-Arousal Language Shapes Micro- Versus Macro-Influencers' Impact." *Journal of Marketing*, Vol. 88, No. 4, pp 107–28.
- De Veirman, M., Cauberghe, V., & Hudders, L. (2017) "Marketing Through Instagram Influencers: The Impact of Number of Followers and Product Divergence on Brand Attitude", *International Journal of Advertising*. Vol 36, No. 5, pp 798-828.
- Ge, J., & Gretzel, U. (2018) "Emoji Rhetoric: A Social Media Influencer Perspective", *Journal of Marketing Management*, Vol 34, No 5-16, pp 1272-1295.
- Leung, Xi Y., et al. (2022) "Attractive Females versus Trustworthy Males: Explore Gender Effects in Social Media Influencer Marketing in Saudi Restaurants", *International Journal of Hospitality Management*, Vol 103, pp. 103207-.
- Needles, A. & Thompson, G. (2013) "Social Media Use in the Restaurant Industry: A Work in Progress", *Cornell Hospitality Report*. Vol 13, No 7, pp 6-16.
- Statista. (2024). *Global Influencer Market Size from 2020 to 2025*. Statistical Research Department. February 20.
- Stubb, Carolina, and Jonas Colliander (2019) "'This Is Not Sponsored Content' – The Effects of Impartiality Disclosure and e-Commerce Landing Pages on Consumer Responses to Social Media Influencer Posts." *Computers in human behavior*, Vol 98, pp 210–222.
- Sun, J., Leung, X.Y., Bai, B., 2021 "How Social Media Influencer's Event Endorsement Changes Attitudes of Followers: The Moderating Effect of Followers' Gender", *International Journal of Contemporary Hospitality Management*, Vol 33, No 7, pp 2337–2351.
- Szymkowiak, A., Gaczek, P. & Padma, P. (2021) "Impulse Buying in Hospitality: The Role of Content Posted by Social Media Influencers", *Journal of Vacation Marketing*, Vol 27, No 4, pp 385-399.

The Role of B-Corp's in the Development of Tourism Businesses in South Africa

Christopher Moon

Marketing, Enterprise and Tourism, Middlesex University, London, UK

c.moon@mdx.ac.uk

Abstract: This paper explores the significance of the B-Corp certification to the development of tourism businesses in South Africa. The paper draws on two case examples of B-Corp's that already operate in South Africa, that of Intrepid Travel, the world's largest travel B-Corp, and Nawiri Group, the first B-Corp in Sub-Saharan Africa. Background is provided on the impact of climate change on the South African tourism industry, and the impact that B-Corp's can and do have. The role of B-Corp certification on climate change resilience, adaptation and governance is explored in relation to both Intrepid and Nawiri, as exemplars to other tourism organisations in the region. The paper is based on reported practices rather than purely theoretical insights. However, analysis of B-Corp Disclosure Reports offers insights to their B-Corp status and progress that will assist tourism students learning about the role of B-Corps and B-Tourism, and for tourism organisations to get a more detailed perspective on the processes involved.

Keywords: B-Tourism, B-Corp, South Africa, Tourism industry, Climate change

1. Introduction

Saarinen et al (2023) 'explore the nature of climate change in southern Africa, it impacts on tourism, and the resilience, adaptation, and governance needed in various tourism operations and environments. These authors point out that there have been at least 57 publications on climate change and tourism in southern Africa as of 2022 (Scopus and Google Scholar) and climate justice has become a significant issue. Thus, much of the global tourism literature is about the Global North and the unique context of areas such as southern Africa is often overlooked. There is a call now for more research on how tourism companies are anticipating climate change impacts rather than just reacting to change, and indications of how tourism can contribute to the UN SDGs is highlighted in this regard.

The above also indicates that tourism companies need to be Responsible i.e., proactive rather than passive and Reactive to the climate change emergency, and the place of travel and tourism certification provides a case in point where the industry can benefit from learning about best practices through networks and consumers will have more information to decide on which companies to use.

2. The Place of B Corp

Travel by B Corp is a collective of B-certified companies founded in 2021 by Intrepid Travel and Pura Aventura (Travel by B Corp, 2023) with members from hotel groups to holiday parks, tailor-made travels to large tour operators. Context is important in translating any global standards into local policies. However, by sharing best practices through the Travel by B Corp network, B-Travel Corps can improve practices towards a more Responsible Tourism Industry. By sharing best practices through other networks, they can impact other industries as well.

B-lab began in 2006 on the premise that business could lead the way towards a new, stakeholder-driven model (B-lab, 2023). B-Lab thus started designating 'B Corporations' based on audits and certifications to verify high standards of social and environmental performance, accountability, and transparency.

According to B-Corp (2023) "B Corp Certification is a designation that a business is meeting high standards of verified performance, accountability, and transparency on factors from employee benefits and charitable giving to supply chain practices and input materials. To achieve certification, a company must:

1. Demonstrate high social and environmental performance by achieving a B Impact Assessment score of 80 or above and passing our risk review. Multinational corporations must also meet baseline requirement standards.
2. Make a legal commitment by changing their corporate governance structure to be accountable to all stakeholders, not just shareholders, and achieve benefit corporation status if available in their jurisdiction.
3. Exhibit transparency by allowing information about their performance measured against B Lab's standards to be publicly available on their B Corp profile on B Lab's website. "

The B-Impact Assessment management tool is used by over 50,000 businesses worldwide including over 3,000 Certified B Corporations, and helps companies assess their impact on various stakeholders, including their workers, community, customers, and the environment (B-Corp, 2023).

This paper reviews the impact of two certified B-Corp tourism businesses operating in South Africa and discusses the significance of the B-Corp movement to the development of other tourism businesses in South Africa.

3. Comparison of Nawiri and Intrepid

Nawiri Group (2023) was founded in 2022 as a new umbrella company of safari travel businesses operating in sub-saharan Africa including Asilia Africa (formed in 2004 and B-Corp certified in 2021), Bazaruto (formed in 2018), and Go2Africa (formed in 1998). Figure 1 details Nawiri's latest B-Corp Impact Scores.

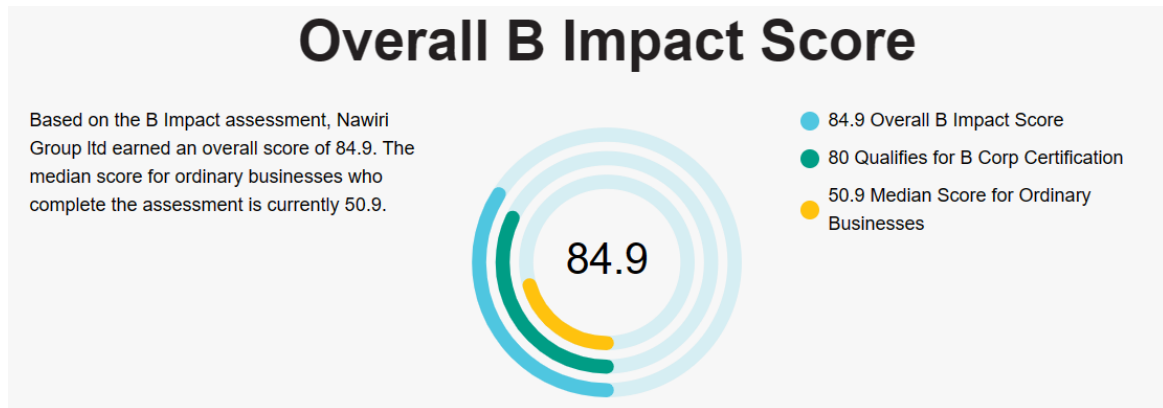


Figure 1: Nawiri B-Corp scores (B-Corp 2023a)

Intrepid Travel (2023) was founded in 1989 as a tour operator and became a B-Corp in 2018 (see Figure 2). The founders were two Australian travellers. Intrepid Group describe themselves as the world's largest adventure travel group (Intrepid DMC, 2021) and cites 28 destination management companies (DMCs) in the group across Africa, Asia, Europe, and Latin America. Intrepid B-Corp Impact Scores are in Figure 2.

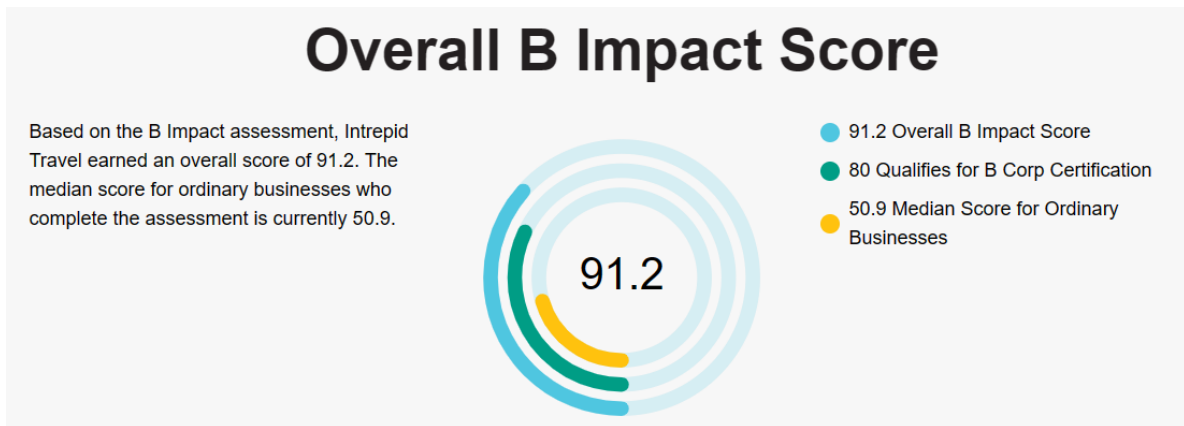


Figure 2: Intrepid Travel B-Corp scores (B-Corp 2023b)

4. Findings and Discussion

Both travel companies score highly on B impact with Nawiri scoring an overall 84.9 and Intrepid 91.2. Comparisons of individual scores are in Figure 3.

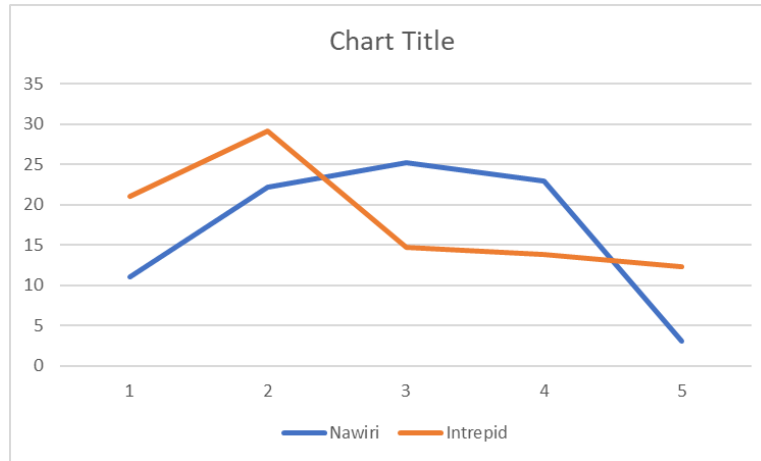


Figure 3: Comparison of B-Corp scores for Nawiri and Intrepid (Author graph based on B-Corp data)

At first sight the scores for Intrepid and Nawiri provide a confusing picture when compared. Thus, Nawiri score higher than Intrepid for Community and Environment, and Intrepid score higher for Governance, Workers, and Customers (see Figures 4 and 5 for the raw data). By understanding these differences both companies can learn from each other's practices.

Governance 11.1 Governance evaluates a company's overall mission, engagement around its social/environmental impact, ethics, and transparency. This section also evaluates the ability of a company to protect their mission and formally consider stakeholders in decision making through their corporate structure (e.g. benefit corporation) or corporate governing documents.	
Mission & Engagement	3.2
Ethics & Transparency	5.4
+ Mission Locked	2.5
What is this? A company with an Impact Business Model is intentionally designed to create a specific positive outcome for one of its stakeholders - such as workers, community, environment, or customers.	
Workers 22.2 Workers evaluates a company's contributions to its employees' financial security, health & safety, wellness, career development, and engagement & satisfaction. In addition, this section recognizes business models designed to benefit workers, such as companies that are at least 40% owned by non-executive employees and those that have workforce development programs to support individuals with barriers to employment.	
Financial Security	3.6
Health, Wellness, & Safety	8.7
Career Development	2.8
Engagement & Satisfaction	4.2
Community 25.2 Community evaluates a company's engagement with and impact on the communities in which it operates, hires from, and sources from. Topics include diversity, equity & inclusion, economic impact, civic engagement, charitable giving, and supply chain management. In addition, this section recognizes business models that are designed to address specific community-oriented problems, such as poverty alleviation through fair trade sourcing or distribution via microenterprises, producer cooperative models, locally focused economic development, and formal charitable giving commitments.	
Diversity, Equity, & Inclusion	4.5
Economic Impact	4.6
Civic Engagement & Giving	4.0
Supply Chain Management	6.1
+ Supply Chain Poverty Alleviation	3.6
What is this? A company with an Impact Business Model is intentionally designed to create a specific positive outcome for one of its stakeholders - such as workers, community, environment, or customers.	

Environment 23.0 Environment evaluates a company's overall environmental management practices as well as its impact on the air, climate, water, land, and biodiversity. This includes the direct impact of a company's operations and, when applicable its supply chain and distribution channels. This section also recognizes companies with environmentally innovative production processes and those that sell products or services that have a positive environmental impact. Some examples might include products and services that create renewable energy, reduce consumption or waste, conserve land or wildlife, provide less toxic alternatives to the market, or educate people about environmental problems.	Environmental Management	3.1
	Air & Climate	7.9
	Water	2.9
	Land & Life	6.5
Customers 3.1 Customers evaluates a company's stewardship of its customers through the quality of its products and services, ethical marketing, data privacy and security, and feedback channels. In addition, this section recognizes products or services that are designed to address a particular social problem for or through its customers, such as health or educational products, arts & media products, serving underserved customers/clients, and services that improve the social impact of other businesses or organizations.	Customer Stewardship	3.1

Figure 4: Nawiri B-impact scores in five domains (B-Corp, 2023a)

Governance 21.0 Governance evaluates a company's overall mission, engagement around its social/environmental impact, ethics, and transparency. This section also evaluates the ability of a company to protect their mission and formally consider stakeholders in decision making through their corporate structure (e.g. benefit corporation) or corporate governing documents.		
Workers 29.2 Workers evaluates a company's contributions to its employees' financial security, health & safety, wellness, career development, and engagement & satisfaction. In addition, this section recognizes business models designed to benefit workers, such as companies that are at least 40% owned by non-executive employees and those that have workforce development programs to support individuals with barriers to employment.		
Community 14.7 Community evaluates a company's engagement with and impact on the communities in which it operates, hires from, and sources from. Topics include diversity, equity & inclusion, economic impact, civic engagement, charitable giving, and supply chain management. In addition, this section recognizes business models that are designed to address specific community-oriented problems, such as poverty alleviation through fair trade sourcing or distribution via microenterprises, producer cooperative models, locally focused economic development, and formal charitable giving commitments.		

Environment 13.8

Environment evaluates a company's overall environmental management practices as well as its impact on the air, climate, water, land, and biodiversity. This includes the direct impact of a company's operations and, when applicable its supply chain and distribution channels. This section also recognizes companies with environmentally innovative production processes and those that sell products or services that have a positive environmental impact. Some examples might include products and services that create renewable energy, reduce consumption or waste, conserve land or wildlife, provide less toxic alternatives to the market, or educate people about environmental problems.

Customers 12.3

Customers evaluates a company's stewardship of its customers through the quality of its products and services, ethical marketing, data privacy and security, and feedback channels. In addition, this section recognizes products or services that are designed to address a particular social problem for or through its customers, such as health or educational products, arts & media products, serving underserved customers/clients, and services that improve the social impact of other businesses or organizations.

Figure 5: Intrepid B-impact scores in five domains (B-Corp, 2023b)

The following table outlines the areas for improvement for each company. However, this does not mean that both companies do not need to improve in all five areas.

Table 1: Areas for improvement on B-Corp scores

	Nawiri	Intrepid
1 Governance	*	
2 Workers	*	
3 Community		*
4 Environment		*
5 Customers	*	*

Intrepid (2023b) Disclosure Report points to more detail on some areas that can be improved. For example, Intrepid report 12 legal actions arising from 5 accidents with 6 of 12 lawsuits ongoing and 6 resolved. On-trip accidents which have resulted in fatalities include: A rhino charge in Nepal in 2013 resulting in the fatality of a local guide travelling with an intrepid group, A vehicle accident in Kenya in 2014 resulting in 2 traveller fatalities, A vehicle accident in Peru resulting in 1 fatality, altitude related illness resulting in 1 staff member fatality in Nepal in 2017, and possibly 1 traveller fatality in Tanzania in 2017, and a presumed hit and run traveller fatality in Vietnam in 2018. Intrepid Group state they have comprehensive safety processes in place.

Nawiri (2023b) Disclosure Report points to various risks associated with the company's operations such as camp hazards (fuel, water, waste, pollution) and that 88% of its operations are carried out in protected land conservatories in several locations, the majority of which are in Tanzania and Kenya, plus some protected areas across Southern Africa, such as the Kruger National Park in South Africa and Chobe National Park in Botswana. In Kenya, the conservancies are protected by agreement with local landowners (mostly local Masai). Nawiri Group states that the wildlife and natural habitat in these areas is often under threat and its operations are subject to yearly audits to minimise any negative impacts. This includes monitoring of energy, water, and waste, with off-setting of emissions if mitigation is not possible.

Clearly, Intrepid has challenges managing its operations across multiple continents with different legal requirements in various countries. Governance and the overseeing of local workers is thus a significant challenge. Nawiri appear to work well with local partners but has challenges in conserving sensitive ecosystems. Both organisations can share best practices, and the B-Corp certification with disclosure requirements does allow for this knowledge transfer to take place. Both organisations regard themselves as responsible travel and

tourism companies. In fact, Intrepid has become a Harvard case study on sustainability leadership (Intrepid, 2021) published jointly with the World Travel and Tourism Council. This case study though lacks critical insight.

Based on the B-Corp scoring and Disclosure Report, Intrepid could be said to need to improve in the following ways: Governance – Intrepid needs to ensure that its safety policies and procedures are regarded as an ethical commitment in training, development, and performance management, and not just a rules-based system for checking annually. Workers - This is especially significant for any outsourced or subcontracted staffing. Are these workers fully engaged and empowered, and do they receive clear guidance on identifying and preventing risks?

Further, based on the B-Corp scoring and Disclosure Report, Nawiri could be said to need to improve in the following ways: Environment – Nawiri can set more specific environmental targets (energy, water, waste), emissions reduction (CO2) targets, and conservation targets (such as the area of land to be regenerated each year), and practical projects that make a real impact on local flora, fauna, and wildlife. The Nawiri support of the Usangu Wetlands Research Project, the Conservancy Operating Fund, and the Wildlife Tourism College of Maasai Mara, are all excellent initiatives which can all be more clearly related to the UN SDGs to ensure that more stakeholders are engaged, and the knowledge transferred.

5. Conclusions

This paper has provided two examples of B-Corp tourism businesses operating in southern Africa and discussed their B-Corp Impact Scores in comparison to each other and in relation to broader climate change issues and impacts affecting the region.

The paper does not provide a fully documented B-Impact analysis and recommendations, nor fully researched case studies, but does indicate areas that both companies can improve in. The benefits of the B-Corp movement for tourism businesses operating in South Africa are highlighted, and that increasing the network of certified B-Corp's will provide a larger network to share best practices and resolve issues. This is important given the increasing pace and intensity of climate change impacts and the need for tourism businesses to more adequately plan for increasing risks so that they can take a more preventative approach to risk management.

The relative scores for two B-Corps were highlighted and compared including their respective Disclosure Reports. The results are limited to these two B-Corps. However, as they both operate in southern Africa the review provides a useful overview of the benefits of B-Corp certification to the tourism industry in southern Africa and more widely.

Acknowledgements

This is a working paper and builds on the prior research of Batle et al (2018), Moon and Batle (2018), Moon et al (2020) highlighting eco and social innovations in the tourism industry. These were all papers presented as part of the special track on Sustainable Tourism and Circular Economy at the International Conference Tourism Research. If you have an interest in B-Corps, B-Travel, etc., please contact the author of this paper for potential collaboration towards publication.

References

- Acevedo-Duque, Á., Gonzalez-Diaz, R., Vega-Muñoz, A., Fernández Mantilla, M. M., Ovalles-Toledo, L. V., & Cachicatari-Vargas, E. (2021). The Role of B Companies in Tourism towards Recovery from the Crisis COVID-19 Inculcating Social Values and Responsible Entrepreneurship in Latin America. *Sustainability*, 13(14), 7763. <https://doi.org/10.3390/su13147763>
- Batle, J., Orfila-Sintes, F. and Moon, C.J., 2018. Environmental management best practices: Towards social innovation. *International Journal of Hospitality Management*, 69, pp.14-20.
- B-Corp. 2023. B-Corp Certification. <https://www.bcorporation.net/en-us/certification/>
- B-Corp. 2023a. Impact scores for Nawiri Group Ltd. Available at: <https://www.bcorporation.net/en-us/find-a-b-corp/company/nawiri-group-ltd/>
- B-Corp. 2023b. Impact scores for Intrepid Travel. Available at: <https://www.bcorporation.net/en-us/find-a-b-corp/company/intrepid-group-ltd/>
- Diez-Busto, E., Sanchez-Ruiz, L., & Fernandez-Laviada, A. (2021). The B Corp Movement: A Systematic Literature Review. *Sustainability*, 13(5), 2508. <https://doi.org/10.3390/su13052508>
- Edwards, K. 2023. What is a B Corp™? Meet the travel operators becoming a force for good. What does it mean to be 'certified B Corp™'? And who should we be looking out for when booking ethical trips? *Wanderlust*. Available at: <https://www.wanderlustmagazine.com/inspiration/b-corp-travel-operators/>

- Intrepid. 2021. Sustainability Leadership Case Studies. Intrepid Travel: Certified B Corp. Available at: https://www.intrepidtravel.com/sites/intrepid/files/basic_page/files/WTTC%20Case%20Study%20-%20Intrepid%20Travel.pdf
- Intrepid DMC. 2021. Intrepid Destination Management Company. Available at: <https://www.intrepiddmc.com/>
- Intrepid. 2023a. Intrepid Travel. Available at: <https://www.intrepidtravel.com>
- Intrepid. 2023b. Intrepid Travel Disclosure Report. Available at: <https://s3.amazonaws.com/blab-impact-published-production/public/egiAo7OPISqXHGzzk4rGGEBvXtEDf7xEQJvinUwU>
- Intrepid Group Ltd. Disclosure Report. 2021, 2025. B-Lab Global. Available at: <https://www.bcorporation.net/en-us/find-a-b-corp/company/intrepid-group-ltd/>
- Mahlatini Luxury Travel Disclosure Report. 2024. B-Lab Global. Available at: <https://www.bcorporation.net/en-us/find-a-b-corp/company/mahlatini-luxury-travel/>
- Market Data Forecast, 2024, Global Ecotourism Market Research Report – Segmentation By Traveler Type (Solo and Group), By Sales channel (Travel agents and Direct) and Region (North America, Europe, Asia Pacific, Latin America, and Middle East & Africa) - Industry Analysis (2024 to 2032). Available at: <https://www.marketdataforecast.com/market-reports/ecotourism-market>
- Moon, C.J. and Batle, J., 2018. Mass Tourism vs. Sustainable Tourism in the Balearic Islands? Measuring Social and Environmental Impact in Mallorca. In International Conference on Tourism Research (pp. 104-VIII). Academic Conferences International Limited.
- Moon, C., Batle, J. and Morales, M., 2020. Eco-innovation in the hotel industry: A review of seven hotels using the UNWTO 2030 sustainability guidelines. In International conference on tourism research (pp. 365-VI). Academic Conferences International Limited.
- Nawiri. 2023a. Nawiri Group Ltd. Available at: www.nawirigroup.com
- Nawiri. 2023b. Nawiri Group Disclosure Report. Available at: <https://s3.amazonaws.com/blab-impact-published-production/rVcxhXLqDNA9u1z4WRdmSMUTl4klqvq8>
- Nawiri Group Ltd Disclosure Report 2023. B-Lab Global. Available at: <https://www.bcorporation.net/en-us/find-a-b-corp/company/nawiri-group-ltd/>
- O'Regan, M, 2019. B Corp certification won't guarantee companies really care for people, planet and profit. Available at: <https://www.bournemouth.ac.uk/news/2019-10-08/opinion-b-corp-certification-wont-guarantee-companies-really-care-people-planet-profit>
- Saarinen, J., Fitchett, J. and Hoogendoorn, G., 2022. Climate change and tourism in southern Africa. Routledge.
- Travel by B Corp. 2023. Travel by B Corp. Available at: <https://www.travelbybcorp.com/>
- Tuppen, H, 2024. B Corps can help us travel more responsibly—but what are they? National Geographic. Available at: <https://www.nationalgeographic.com/travel/article/what-are-b-corps-responsible-travel>

Tourism Through Pop Culture: A Conceptual Model Rooted in Japanese Cultural Events

Filipe Segurado Severino

Escola Superior de Hotelaria e Turismo do Estoril (ESHTE), Estoril, Portugal

CiTUR - Centre for Tourism Research, Development and Innovation, Estoril, Portugal

RESILIENCE – Centre for Regional Resilience and Sustainability, Setúbal, Portugal

filipe.severino@eshte.pt

Abstract: This paper examines the generalization of a conceptual model that positions emerging events featuring exotic popular content as catalysts for tourism development. Originally developed through an analysis of Japanese pop culture events, such as anime conventions, the model underscores the pivotal role of these cultural events in attracting international tourists and fostering cross-cultural engagement. The framework focuses on three core components: the relationship between tourism and events, the direct and indirect impacts on the host destination and the culture destination origin, and strategic communication and differentiation efforts that enhance a destination's global appeal. To broaden the applicability of this model to other emerging cultural phenomena, five essential criteria are identified: cultural distinction and exoticism, the multiplicity of content catering to diverse demographic segments, authenticity in representing cultural narratives, the cultivation of personal connections through cultural themes, and the active participation of audiences in generating secondary content, such as cosplay or fan-produced media. These criteria, validated through the analysis of Japanese pop culture events, are critically examined for their potential application to other global cultural trends, with particular emphasis on South Korean pop culture. Through an in-depth case study of South Korean pop culture, the paper illustrates the adaptability of the model to other global cultural movements. K-pop events, noted for their exceptional fan interaction, digital engagement, and innovative performances, meet many of the established criteria, particularly in terms of cultural distinction and audience immersion. However, certain limitations in the diversity of cultural offerings at these pop events suggest opportunities for further development to fully realize the model's potential across different cultural contexts. Finally, the paper discusses the strategic implications for tourism destinations, advocating that through robust digital strategies and the promotion of culturally distinctive events, destinations can effectively position themselves as prominent hubs for global tourism. The generalized model provides a practical framework for leveraging cultural events to boost destination visibility, foster cross-cultural appreciation, and stimulate long-term tourism growth.

Keywords: Cultural events, Tourism, Pop culture events, Destination development, Japanese pop culture

1. Introduction

Events are essential drivers of tourism, acting as catalysts for attracting visitors and fostering intercultural exchange (Getz and Page, 2020). Particularly, events featuring exotic popular content with strong cultural distinction and niche appeal are effective in boosting tourism and promoting development in host destinations (Seaton et al., 2017; Severino and Silva, 2023). These events increase cultural visibility and global recognition, enhancing tourist numbers and fostering cultural appreciation.

This paper presents a conceptual model based on Japanese pop culture events, which feature Japanese animation (anime), comic books (manga), fashion (cosplay), and more (Kawamata et al., 2017). These events exemplify how diverse cultural experiences drive tourism, generating economic benefits and promoting cultural exchange (Tajima et al., 2018). The model highlights the interaction between tourism and events, impacts on host destinations and on the culture of origin destination, and strategic communication practices that distinguish these events globally (Severino et al., 2024).

To extend the model's application, this study explores its use for other emerging cultural trends, particularly South Korea's K-pop. As K-pop gains global prominence, its events offer interactive experiences through music, digital platforms, and fan engagement (Kim et al., 2021). This paper examines the potential to generalize the model to diverse cultural contexts, focusing on how these events can enhance destination appeal and promote sustainable tourism growth.

2. Conceptual Model of Japanese Pop Culture Events and Tourism

Severino et al. (2024) model explores the relationship between tourism and cultural events, with Japanese pop culture events serving as prime examples of how culturally distinctive experiences attract tourists and elevate host destinations.

The model identifies three key components that facilitate the interaction between tourism and cultural events:

1. Tourism and events: The model highlights the synergy where cultural events stimulate tourism by offering unique experiences (Negruşa et al., 2016). Japanese pop culture events, featuring animation, music, and fashion, appeal to a wide audience and stimulate economic activity tied to tourism (Tajima et al., 2018).
2. Impacts on the host destination and on the destination of culture origin: Beyond immediate economic benefits, these events enhance international visibility and long-term tourism growth for both destinations, from the host destination of the event and the destination of culture origin (Kawamata et al., 2017). "Contents tourism", where tourists explore locations featured in media, further enriches the destination's cultural landscape (Seaton and Yamamura, 2015).
3. Communication and differentiation strategies: The model underscores the importance of digital marketing, storytelling, and user-generated content, such as cosplay, in promoting cultural uniqueness and engaging audiences (Masterman and Wood, 2006; Lamerichs, 2013).

This model fosters tourism development while promoting "otaku tourism", encouraging international visitors to explore Japan's cultural elements featured in media (Okamoto, 2015). The framework's adaptability allows its application to various contexts, maintaining core principles of cultural distinction and strategic communication.

3. Model Generalization Requirements

To generalize the conceptual model of Japanese pop culture events to other cultural contexts, five essential criteria are identified. These ensure that distinct cultural phenomena can effectively leverage event tourism for growth and development:

- Cultural distinction and exoticism: The culture must be perceived as unique and intriguing, offering experiences that differ from mainstream global culture. Japanese pop culture achieves this through captivating aesthetics and a blend of traditional and modern elements, attracting international tourists (García, 2011; Otmazgin and Otmazgin, 2016). The model can be applied to other cultures that offer similarly distinct characteristics.
- Diversity of experiences for varied audiences: Events should provide diverse experiences to appeal to different demographics. Japanese pop culture spans multiple forms, such as anime, manga, and music, attracting a broad audience (Craig, 2020; Freedman and Slade, 2018). A similar diversity of experiences is necessary in other cultural contexts to ensure broad tourism appeal.
- Authenticity of cultural representation: Events must authentically represent the culture, reinforcing emotional connections for participants (McCartney and Osti, 2007). Japanese pop culture events integrate contemporary and traditional elements, adding cultural value (Seaton and Yamamura, 2015). Generalizing the model requires maintaining authenticity in representing the target culture.
- Imagination and re-creation of ideologies: Events should offer immersive experiences that allow participants to engage deeply with cultural themes (Gjorgievski and Trpkova, 2012). Japanese pop culture events create environments for strong personal connections through narratives and characters (Tajima et al., 2018). The model is adaptable to other cultures that offer similar engagement opportunities.
- Active participation and creative engagement: Active fan participation, such as cosplay, adds depth to the cultural experience (Reysen et al., 2018). This aspect enhances the tourism appeal of Japanese pop culture events (Kawamata et al., 2015). To generalize the model, other cultures must promote opportunities for fan creativity and interaction.

These criteria allow culturally distinctive events to drive tourism growth, enhance visibility, and promote cross-cultural understanding. Figure 1 illustrates how the model can be adapted to different cultural contexts while maintaining core characteristics that support tourism growth and cultural identity.

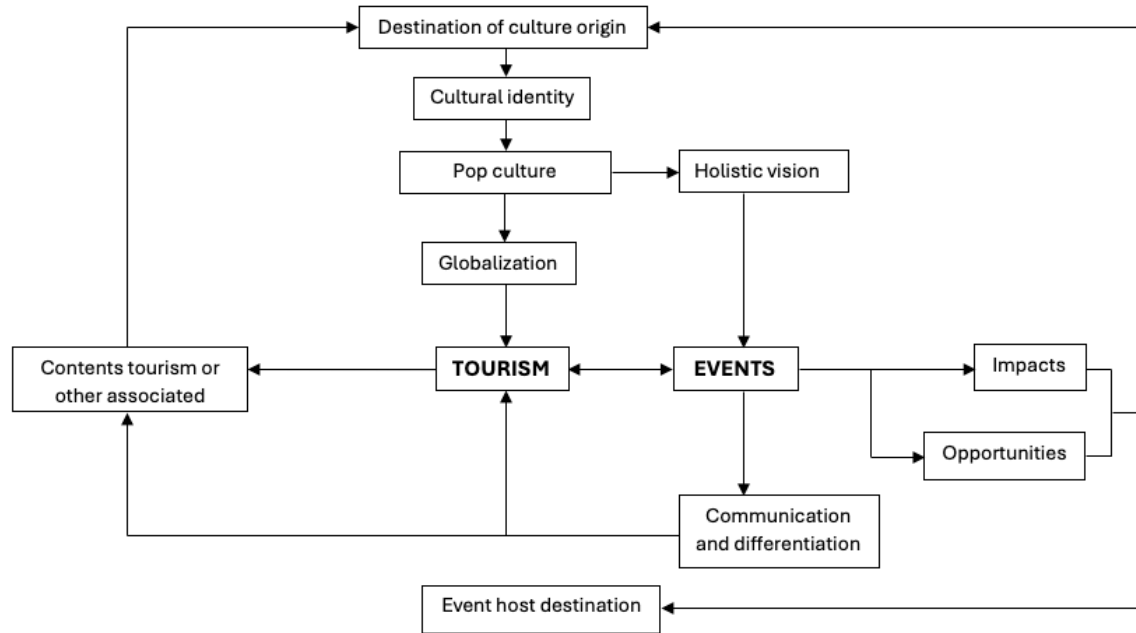


Figure 1: Generalized Model of Cultural Events and Tourism

4. The Case of South Korea Pop Culture and Application of the Generalized Model

The global success of K-pop in events, an element of South Korean pop culture, illustrates how the conceptual model can apply to other emerging cultural phenomena. K-pop events, such as concerts, attract large international audiences and share characteristics with Japanese pop culture events, including cultural distinction, audience engagement, and authentic storytelling (Kim et al., 2022). K-pop leverages digital platforms like social media to connect with global fans, enhancing its reach and fostering a sense of community (Kim et al., 2021).

While K-pop's focus on music-centric activities may limit event diversity, it still aligns with the model's criteria for cultural distinction and exoticism (Messerlin and Shin, 2017). Expanding into other facets of South Korean pop culture could diversify the experiences offered, enhancing appeal to a broader audience.

K-pop plays a key role in promoting tourism in South Korea, with fans frequently visiting sites linked to their favourite stars (Oh et al., 2015). The "Korean Wave" or "Hallyu" reflects the rise of South Korean pop culture, expanding beyond music into films, television series, and online gaming, further solidifying South Korea's status as a global hub for cultural experiences. This phenomenon has fostered a distinct cultural identity that is widely recognized and could easily be leveraged in events featuring multivariate themes (Sunyogita, 2024).

K-pop's digital engagement and active fan participation align with the theoretical framework, demonstrating its capacity to adapt to diverse cultural contexts, provided that its unique features are strategically leveraged and supported by effective marketing efforts. Thus, investing in a diversity of experiences and fostering creative engagement can further maximize the cultural potential and its global appeal.

5. Conclusion

The analysis of Japanese pop culture and K-pop demonstrates the potential to extend the conceptual model to other cultural phenomena, as long as key criteria, as cultural distinction, diverse experiences, authenticity, personal connection, and active participation, are met. The model's flexibility allows its application across cultural contexts, attracting international audiences through the unique appeal of these trends.

Generalizing the model provides a valuable framework for promoting cultural tourism globally, enabling emerging cultural trends to replicate the success of Japanese pop culture and K-pop. By adhering to established criteria, destinations can leverage cultural events to attract tourists, foster intercultural understanding, and support sustainable tourism growth (Severino et al., 2024).

However, validating the model's applicability across different contexts remains essential. Pilot projects will help test its effectiveness, with continuous adaptation and empirical research ensuring its relevance in an increasingly dynamic global tourism landscape.

References

- Craig, T. (2020), *Cool Japan: Inside Japan's cultural and creative industries*, Bluesky Publishing, Ashiya.
- Freedman, A. and Slade, T. (2018) *Introducing Japanese Popular Culture*, Routledge, New York.
- García, H. (2011) *A Geek in Japan: Discovering the land of manga, anime, zen, and the tea ceremony*, Tuttle Publishing, Singapore.
- Getz, D. and Page, S. (2020) *Event Studies: Theory, Research and Policy for Planned Events*, Routledge, New York.
- Gjorgievski, M. and Trpkova, S. (2012) "Movie Induced Tourism: A new tourism phenomenon", *UTMS Journal of Economics*, Vol 3, No. 1, pp 97-104.
- Kawamata, K., Tajima, N., Kuroiwa, K. and Miura, T. (2017) *Some Preliminary Notes on the Evolution and Development Process of Japanese Pop Culture Events*, JSPS KAKENHI Grant Number, Tokyo.
- Kim, J., Kim, K., Park, B. and Choi, H. (2022) "The Phenomenon and Development of K-Pop: The Relationship between Success Factors of K-Pop and the National Image, Social Network Service Citizenship Behavior, and Tourist Behavioral Intention", *Sustainability*, Vol 14, No. 6, <https://doi.org/10.3390/su14063200>.
- Kim, S., Hwang, S. and Kim, J. (2021) "Factors influencing K-pop artists' success on V live online video platform", *Telecommunications Policy*, Vol 45, No. 3, <https://doi.org/10.1016/j.telpol.2020.102090>.
- Lamerichs, N. (2013) "The Cultural Dynamic of Doujinshi and Cosplay: Local Anime Fandom in Japan, USA and Europe", *Participations*, Vol 10, No. 1, pp 154-176.
- Masterman, G. and Wood, E. (2006) *Innovative Marketing Communications: Strategies for the Events Industry*, Butterworth-Heinenmann, Oxford.
- McCartney, G. and Osti, L. (2007) "From Cultural Events to Sport Events: A Case Study of Cultural Authenticity in the Dragon Boat Races", *Journal of Sport Tourism*, Vol 12, No. 1, pp 25-40, <https://doi.org/10.1080/14775080701496750>.
- Messerlin, P. and Shin, Wonkyu (2017) "The Success of K-pop: How Big and Why so Fast?", *Asian Journal of Social Science*, Vol 45, No. 4-5, pp 409-439.
- Negrușă, A., Toader, V., Rus, R. V. and Cosma, S. (2016) "Study of perceptions on cultural events' sustainability", *Sustainability*, Vol 8, No. 12, <https://doi.org/10.3390/su8121269>.
- Oh, S., Ahn, J. and Baek, H. (2015) "The Effects of Social Media on Music-induced Tourism: A Case of Korean Pop Music and Inbound Tourism to Korea", *Asia Pacific Journal of Information Systems*, Vol 25, No. 1, pp 121-143, <http://dx.doi.org/10.14329/apjis.2015.25.1.121>.
- Okamoto, T. (2015) "Otaku tourism and the anime pilgrimage phenomenon in Japan", *Japan Forum*, Vol 27, No. 1, pp 12-36, <https://doi.org/10.1080/09555803.2014.962565>.
- Otmazgin, K. and Otmazgin, N. (2016) "Japan imagined: popular culture, soft power, and Japan's changing image in Northeast and Southeast Asia", *Contemporary Japan*, Vol 24, No. 1, pp 1-19, <https://doi.org/10.1515/cj-2012-0001>.
- Reysen, S., Plante, C., Roberts, S. and Gerbasi, K. (2018) "Motivations of Cosplayers to Participate in the Anime Fandom", *The Phoenix Papers*, Vol 4, No. 1, pp 29-40, <https://doi.org/10.17605/OSF.IO/UT4FB>.
- Seaton, P. and Yamamura, T. (2015) "Japanese Popular Culture and Contents Tourism – Introduction", *Japan Forum*, Vol 27, No. 1, pp 1-11, <https://doi.org/10.1080/09555803.2014.962564>.
- Seaton, P., Yamamura, T., Sugawa-Shimada, A. and Jang, K. (2017) *Contents Tourism in Japan – Pilgrimages to "Sacred Sites" of Popular Culture*, Cambria Press, New York.
- Severino, F.S. and Silva, F. (2023) "The trend of Japanese pop culture and its differentiating approach through event tourism", *International Journal of Event and Festival Management*, Vol 14, No. 4, pp 475-487, <https://doi.org/10.1108/IJEFM-01-2023-0001>.
- Severino, F.S., Silva, F. and Simões, J.M. (2024) "Turismo e eventos de cultura pop Japonesa: Impactes e sinergias interculturais", *Finisterra*, Vol 59, No. 126, <https://doi.org/10.18055/Finis33348>.
- Sunyogita, S. (2024) "Harnessing Cultural Soft Power: A Study of South Korea's Global Influence through the Korean Wave", *Asian Journal of Language, Literature and Culture Studies*, Vol 7, No. 2, pp 261-268.
- Tajima, N., Kawamata, K. and Miura, T. (2018) *The process of the development and evolution of Japanese pop culture events: Case of the World Cosplay Summit*, [Conference presentation], 10th Midterm Conference of the Research Networks, 4–7 September 2018, Department of Sociology at the University of Malta, Valletta.

Late Submissions

How Destination Narratives Influence Visit Intention

Luísa Augusto¹, Sara Santos¹, Sónia Ferreira² and Pedro Espírito Santo³

¹CISED, Polytechnic Institute of Viseu, Portugal

²CIDEI, Polytechnic Institute of Viseu, Portugal

³CARME, Polytechnic Institute of Leiria, Portugal

laugusto@esev.ipv.pt

ssantos@esev.ipv.pt

sonia.ferreira@esev.ipv.pt

pedro.m.santo@ipleiria.pt

Abstract: The competitive environment of the tourism sector requires new strategies for constructing engaging narratives to stimulate interest, raise awareness and create an emotional connection with visitors, allowing for greater involvement that can influence their visit to the destination. The conceptual model of this study aims to analyse how destination narratives promote the intention to visit, exploring the influence of narrative structure and immersion on tourists' positive emotions, attitudes and behaviours. This study uses a quantitative approach based on structural equation modelling structural equations using the AMOS software. Considering a sample of 901 respondents, this research allowed us to conclude that the narratives influenced positive emotions and attitudes towards regions, conditioning the intention to visit the destination. In this way, this study brings contributions to academia and the professional world, as it allows for a deeper understanding of effective tourism marketing strategies and their practical implications.

Keywords: Narratives, Attitudes, Positive emotions, Intention to visit, Destinations

1. Introduction

Narratives play a key role in how tourist destinations are promoted and perceived by potential visitors. The ability to tell engaging and emotionally resonant stories can significantly influence tourists' intention to visit. According to Wong et al. (2016), narratives communicate legends or stories stimulating tourists' interest in visiting the destination. Brechman and Purvis (2015) argue that while traditional advertising media limits creativity, storytelling through video ads allows for deeper understanding. Therefore, understanding how narrative structure and immersion affect tourists' emotions, attitudes, and intentions to visit is essential for developing effective marketing strategies. Thus, this study analyses the influence of narrative on the intention to visit and engage with tourist regions.

2. Literature review

2.1 The Narratives and Emotions Associated With Destination

Brechman and Purvis (2015) highlight that traditional advertising media limit creativity, while video ads allow for greater narrative complexity, as van Laer et al. (2014) noted. Narratives include plots of incidents, conflicts, and final resolutions, as Chang (2009) stated. Brechman and Purvis (2015) add that well-structured narratives include chronology and causality, facilitating causal inference. Dessart (2018) corroborates that narrative immersion can generate positive emotions, influencing attitudes. The literature shows that tourist experiences are linked to positive psychological outcomes and well-being (Filep & Laing, 2019). Kwortnik and Ross (2007) show that holiday planning evokes positive emotions such as comfort and pleasure. Hosany and Gilbert (2010) created the "Destination Emotion Scale" to measure emotions associated with tourist destinations, focusing on joy, love and positive surprise. Positive emotions increase well-being and general happiness (Sirgy, 2010), making tourism vital for mental and emotional health.

2.2 Attitudes, Feelings and Engagement With Destination

Attitude is a learned and experiential predisposition that shapes consumers' consistent responses towards something, whether favourably or unfavourably (Pereira et al., 2019). In the context of tourism, attitude refers to tourists' feelings and predispositions towards holiday destinations and the services offered by these destinations (Bresciani et al., 2015). Several researchers have considered the study of engagement in the tourism industry as a relevant topic (Mariani, Mura, & Di Felice, 2018). Tourist engagement is both a psychological and interactive process, and these cognitive and emotional processes, as well as interactions with the destination, result in greater loyalty to the destination and the tourist site, thus motivating the tourist to consider revisiting the destination (Bowden, 2009; Bryce et al., 2015). Therefore, destination engagement is shaped by a combination of knowledge, impressions, perceptions, prejudices and thoughts about the place

(Jenkins, 1999), both from an emotional (Pike and Ryan, 2004) and rational (Baloglu and McCleary, 1999) perspective. Several studies consider the concept of consumer/tourist engagement in a tourist destination as an essential factor influencing tourist loyalty, satisfaction, and revisit intentions (Patterson, Yu, & de Ruyter, 2006; Vivek, Beatty, & Morgan, 2012).

2.3 Attitudes, Emotions and Visit Intention

Several recent studies have demonstrated the relevance of attitude and behavioural intention to visit a destination (Ryu et al., 2010; Phillips et al., 2013). This intention reflects the predisposition of a potential tourist to visit a particular destination based on various internal and external factors (Su et al., 2020). It can manifest in different ways, such as visit intention or word-of-mouth. Visit intention measures an individual or group's psychological predisposition and intention to travel to a specific destination or participate in particular activities (Lu et al., 2016). Emotions, as subjective factors, significantly influence tourists' visit intentions. Santos et al. (2022) demonstrate that emotions are related to satisfaction, willingness to recommend and the general perception of the destination image, which, in turn, affect changes in tourists' visit intention. Furthermore, advertising can influence tourists' attitudes, beliefs, purchasing behaviours, and visiting intentions (Byun, Jang & Shawn, 2015; Weng et al., 2021).

2.4 Research Hypotheses

Based on the literature review, this research will analyse the following research hypotheses:

H1: Narrative structure positively influences narrative immersion.

H2: Narrative immersion positively influences positive emotions.

H3: Positive emotions positively influence attitudes toward the region described in the narrative.

H4: Attitudes toward the region influence the intention to visit that region.

H5: The intention to visit the region influences engagement with the region.

H6: Narrative immersion positively influences engagement with the region.

3. Methodology

To analyse the determining effects of the intention to visit and involvement with the tourist region, it was decided to choose Portugal as the study's unit of analysis. It is considered a relevant country for studies in the tourism area due to its geographical and cultural diversity. The country offers many tourist attractions ranging from stunning beaches in the Algarve to historic and urban landscapes in cities such as Lisbon and Oporto. This variety makes it possible to explore different types of tourism (cultural, sporting, gastronomic, etc.) and comprehensive studies in this area.

3.1 Questionnaire Design and Data Collection

This research was conducted quantitatively, using a self-administered questionnaire, to which participants, who were invited via email to participate in the study, responded after watching a video about a region of Portugal. To obtain comprehensive answers, videos were shown randomly about different regions of Portugal (Algarve, Alentejo, Centro region, Interior region, city of Lisbon and city of Oporto).

The questionnaire measurement items were assessed on a 5-point Likert scale, ranging from 1 = "strongly disagree" to 5 = "strongly agree", and were constructed based on scales from previous studies. To measure, we used three items adapted from Santos et al. (2023) to measure the structure of the narrative; immersion in the narrative was based on the three items from Augusto et al. (2021); to measure the concept of positive emotions, we followed the 4-item scale from Augusto et al. (2023); attitudes were measured using the 4-item scale from Carlson et al. (2020); visit intention was measured by adapting the 3-item scale from Bianchi et al. (2017); and engagement with the region was measured using the items from Santos and Santo (2019). In this study, a non-probability sampling method was used to collect data from tourists, an approach widely used in social science research that has been documented as a robust data collection method. A total of 915 responses were obtained, of which 68.3% were women. Regarding age, the majority were between 18 and 29 years old (65.2%), followed by those between 30 and 49 years old (20.6%).

3.2 Preliminary Data Analysis

Initially, we conducted a preliminary data analysis and applied several regression models to the different constructs to determine each item's Variance Inflation Factor (VIF). We found that all VIF values are below the threshold recommended by the literature ($VIF < 5$), which leads us to conclude that multicollinearity does not represent a concern (Hair et al., 2018). Regarding the analysis of skewness (Sk) and kurtosis (Ku), the results indicate that the items are aligned with normality ($Sk < 3$; $Ku < 7$) (Hair et al., 2018). We also calculated the Kaiser-Meyer-Olkin (KMO) value and performed Bartlett's sphericity test to assess the adequacy of our sample. The KMO value is 0.903 (> 0.7), and the sphericity test was significant ($p < 0.05$), rejecting the null hypothesis and indicating that the data are suitable for factor analysis. Furthermore, following the guidelines of Podsakoff et al. (2003), we proceeded with the Harman single-factor test, which revealed six factors, with the first factor explaining 18.57% of the variance. Based on this, we assess that common method bias is not problematic in this study.

4. Results

This study used the structural equation modelling (SEM) approach using AMOS software (Anderson & Gerbing, 1988; Bagozzi & Yi, 1988). First, we used confirmatory factor analysis (CFA). We found that the measurement model consists of all latent factors and the 24 measurement items denote the fit indices as showing a reasonable fit of the measurement model [$\chi^2 = 856.540$; $df = 174$, $\chi^2/df (4.923)$; comparative-fit-index [CFI] = 0.955; normative-fit index (NFI) = 0.944; Tucker-Lewis Index [TLI] = 0.946; goodness-of-fit-index [GFI] = 0.914, and root-mean-square-error-of-approximation [RMSEA] = 0.066] (Hair et al., 2018).

4.1 Construct Validity and Reliability

The measurement model was analysed for reliability and validity. First, Cronbach's Alpha values were calculated for all factors, which ranged from 0.817 to 0.936, all above the recommended threshold value of 0.70 (Hair et al., 2018). Then, to assess convergent validity, we observed the standardised item loadings and the average extracted values (AVE) of the constructs in Table 1. All constructs' standardised item loadings (Table 2) are above the minimum value of 0.70, indicating adequate convergent validity.

Table 1: Measurement Model

Latent variable	Items Code	Λ	t -values	R^2	CR	AVE	Alpha
NaSt	NaSt1	0.822	(a)	0.675	0.813	0.593	0.813
	NaSt2	0.77	23.945	0.593			
	NaSt3	0.714	22.021	0.51			
NaTx	NaTx1	0.711	(a)	0.506	0.876	0.705	0.870
	NaTx2	0.887	25.202	0.787			
	NaTx3	0.907	25.553	0.823			
EMPOS	EMPOS1	0.96	(a)	0.922	0.934	0.780	0.936
	EMPOS2	0.955	64.351	0.913			
	EMPOS3	0.803	36.771	0.645			
	EMPOS4	0.802	36.65	0.643			
ATT	ATT1	0.866	(a)	0.75	0.924	0.753	0.924
	ATT2	0.841	32.873	0.706			
	ATT3	0.885	36.011	0.783			
	ATT4	0.878	35.519	0.771			
INTVIS	INTVIS1	0.877	(a)	0.769	0.865	0.682	0.857
	INTVIS2	0.882	30.539	0.778			
	INTVIS3	0.707	23.853	0.5			
ENG	ENG1	0.86	(a)	0.74	0.922	0.748	0.917
	ENG2	0.924	38.838	0.855			

Latent variable	Items Code	Λ	t-values	R ²	CR	AVE	Alpha
	ENG3	0.901	37.255	0.813			
	ENG4	0.766	28.171	0.587			

Source: Own elaboration

Notes: λ = Standardized coefficients; (a) the value one was defined to obtain the item metric; CR – Composite reliability, AVE = Average Variance Extracted, NaSt = Narrative Structure, NaTx = Narrative Immersion, EMPOS = Positive Emotions, ATT = Attitude, INTVIS = Visit Intention, ENG = Engagement.

Additionally, we confirmed that the composite reliability (CR) values for the constructs are the values recommended in the literature (CR > 0.70), ranging between 0.813 and 0.934, as shown in Table 1 (Fornell & Larcker, 1981). In this follow-up, we also assessed discriminant validity using the criteria of Fornell and Larcker (1981). Table 2 demonstrates that the AVE of the constructs (presented on the diagonal of Table 3) is higher than the squared inter-construct correlations between them, thus confirming the discriminant validity in this study.

Table 2: Discriminant Validity

Construct	NaSt	NaTx	EMPOS	ATT	INTVIS	ENG
NaSt	0.593					
NaTx	0.582	0.705				
EMPOS	0.389	0.391	0.780			
ATT	0.298	0.183	0.191	0.753		
INTVIS	0.089	0.075	0.099	0.334	0.682	
ENG	0.065	0.076	0.147	0.048	0.056	0.748

Source: Own elaboration

Note: Values marked in bold indicate the average variance extracted. Values off the diagonal are the squared inter-construct correlations NaSt=Narrative Structure, NaTx=Narrative Immersion, EMPOS=Positive Emotions, ATT=Attitude, INTVIS=Visit Intention, ENG=Engagement

Table 3: Hypothesis testing

Hypothesis	β	t value	p-value	
NAST → NATX	0.781	18.196	0.000	Corroborated
NATX → EMPOSI	0.654	18.323	0.000	Corroborated
EMPOSI → ATT	0.449	13.655	0.000	Corroborated
ATT → INTVIS	0.582	16.94	0.000	Corroborated
NATX → ENG	0.245	6.559	0.000	Corroborated
ATT → ENG	0.128	3.55	0.000	Corroborated

Source: Own elaboration

β =Path Coefficients, NaSt=Narrative Structure, NaTx=Narrative Immersion, EMPOS=Positive Emotions, ATT=Attitude, INTVIS=Visit Intention, ENG=Engagement

The six research hypotheses were verified in the model presented, and the structural model under study presents an adequate adjustment $X^2=1064.959$; $df=183$; $p=.000$; $X^2/df=5.819$; $GFI=0.900$; $CFI=0.942$; $NFI=0.931$; $IFI=0.942$; $TLI=0.933$; $RMSEA=0.073$) (Hair et al., 2018).

5. Discussion of Results and Conclusion

The narrative structure can significantly impact narrative immersion by providing a coherent and engaging plot that facilitates the immersion of readers or viewers in the story. Hypothesis H1 was confirmed by this study

($\beta_{\text{NAST} \rightarrow \text{NATX}} = 0.781$; $p < 0.05$), which suggests, in line with the literature, that structural elements such as chronology (beginning, middle, and end), causality (causal relationships between events), and character development are crucial to creating a transportive narrative experience (Grigsby et al., 2023). Thus, a well-structured narrative helps individuals visualise events vividly and leads them to become deeply involved with the plot, resulting in greater immersion and empathy (Ryu et al., 2019).

Narrative immersion positively influences emotions by deeply involving individuals in the story, allowing them to experience the characters' emotions as if they were their own. In this context, hypothesis H2 was corroborated ($\beta_{\text{NATX} \rightarrow \text{EMPOS}} = 0.654$; $p < 0.05$). Studies show that immersion in a well-structured narrative increases empathy and identification with the characters, intensifying positive emotional responses (Grigsby et al., 2023). Therefore, the ability of a narrative to transport its recipients not only facilitates immersion but also amplifies the positive emotions experienced during the narrative.

Hypothesis H3 was confirmed, following what the literature suggests. ($\beta_{\text{EMPOS} \rightarrow \text{ATT}} = 0.449$; $p < 0.05$). Previous studies, such as those by Kwortnik and Ross (2007), show that tourists experience positive emotions when planning trips, which provides well-being even before the trip. The literature also highlights that positive emotions directly influence emotions in forming positive attitudes (Sirgy, 2010; Hosany et al., 2015). To confirm with the literature that attitudes towards a region indicate an intention to visit a destination, we can use studies highlighting the relationship between attitudes and tourist behaviours. For example, Phillips et al. (2013) and Ryu et al. (2010) demonstrate that positive attitudes towards a destination significantly predict the intention to visit. In this investigation, attitude also directly influences the decision to see a tourist destination, which is why hypothesis H4 was also confirmed ($\beta_{\text{ATT} \rightarrow \text{INTVIS}} = 0.582$; $p < 0.05$).

To confirm hypothesis H5 with the literature ($\beta_{\text{ATT} \rightarrow \text{ENG}} = 0.128$; $p < 0.05$), we can refer to several studies that explore the relationship between attitudes, involvement and loyalty to the destination. Bowden (2009) and Bryce et al. (2015) highlight that positive attitudes towards a tourist destination encourage greater participation of tourists, both in psychological and interactive processes. Thus, positive attitudes influence the decision to visit and strengthen tourists' bonds and continuous involvement with the destination. In addition to attitudes towards the region, immersion in narratives promotes participation in the area, which leads us to confirm hypothesis H6 ($\beta_{\text{NATX} \rightarrow \text{ENG}} = 0.245$; $p < 0.05$). Narrative immersion significantly influences engagement as narratives attract individuals' attention and create a strong emotional connection with the characters and the plot, promoting more intense and lasting engagement (Grigsby et al., 2023).

6. Limitations and Suggestions for Future Research

This study has some limitations that should be considered. Firstly, the sample used is predominantly composed of young adults, which may not represent the age diversity of tourists in general. In addition, the data were collected through a self-administered questionnaire, which may introduce response bias. Therefore, for future research, it is suggested that the sample be expanded to include a broader and more diverse age range and tourists from different regions and countries. Furthermore, future studies could explore the impact of various narratives, such as stories told by digital influencers or through augmented reality, which could offer valuable contributions to tourism marketing strategies.

Acknowledgement

This work is funded by National Funds through the FCT – Foundation for Science and Technology, I.P., within the scope of the project Ref. UIDB/05583/2020. Furthermore, we would like to thank the Research Centre in Digital Services (CISeD) and the Instituto Politécnico de Viseu for their support.

References

- Albarq, A. N. (2013). "Measuring the Impacts of Online Word-of-Mouth on Tourists' Attitude and Intentions to Visit Jordan: An Empirical Study", *International Business Research*, 7(1), 14-22
- Ali, F. (2016). "Hotel website quality, perceived flow, customer satisfaction and purchase intention", *Journal of Hospitality & Tourism Technology*, 7(2), 213–228. <https://doi.org/10.1108/JHTT-02-2016-0010>
- Anderson, J. C. & Gerbing, D. W. (1988). "Structural Equation Modeling in Practice: A Review and Recommended Two-Step Approach" *Psychological Bulletin*, 103(3), 411–423. <https://doi.org/10.1037/0033-2909.103.3.411>
- Augusto, L., Santos, S. & Espírito Santo, P. M. (2023). "How Endorser Promotes Emotional Responses in Video Ads", *Smart Innovation, Systems and Technologies*, 531-542
- Augusto, L., Santos, S. & Santo, P. E. (2021). "Youtube as a means of immersing consumers in brand narratives" [Article], *RISTI - Revista Iberica de Sistemas e Tecnologias de Informacao*, 2021(E46), 518-530.

- <https://www.scopus.com/inward/record.uri?eid=2-s2.0-85128773355&partnerID=40&md5=12ef17f37730ed8bac3fb1b070450be8>
- Bagozzi, R. P. & Yi, Y. (1988). "On the evaluation of structural equation models", *Journal of the Academy of Marketing Science*, 16(1), 74–94. <https://doi.org/10.1007/BF02723327>
- Baloglu, S. & McCleary, K.W. (1999). "A model of destination image formation", *Annals of Tourism Research*, 26 (4), 868–897
- Bianchi, C., Milberg, S. & Cúneo, A. (2017). "Understanding travellers' intentions to visit a short versus long-haul emerging vacation destination: The case of Chile", *Tourism Management*, 59, 312–324. <https://doi.org/https://doi.org/10.1016/j.tourman.2016.08.013>
- Bigné, J. E., and L. Andreu (2004). "Emotions in Segmentation: An Empirical Study", *Annals of Tourism Research*, 31 (3), 682–96
- Bowden, J. L.-H. (2009). "The process of customer engagement: A conceptual framework", *The Journal of Marketing Theory and Practice*, 17(1), 63–74. <https://doi.org/10.2753/MTP1069-6679170105>
- Bachman, J., & Purvis, S. (2015). "Narrative, transportation and advertising", *International Journal of Advertising*, 34(2), 366–381.
- Bresciani, S., Thrassou, A., & Vrontis, D. (2015). "Determinants of performance in the hotel industry - an empirical analysis of Italy", *Global Business and Economics Review*, 17(1), 19. <https://doi.org/10.1504/gber.2015.066531>
- Bryce, D., Curran, R., O'Gorman, K., & Taheri, B. (2015). "Visitors' engagement and authenticity: Japanese heritage consumption", *Tourism Management*, 46, 571–581. <https://doi.org/10.1016/j.tourman.2014.08.012>
- Byun, J., & Jang, S. S. (2015). "Effective destination advertising: Matching effect between advertising language and destination type", *Tourism Management*, 50, 31–40.
- Carlson, B. D., Donavan, D. T., Deitz, G. D., Bauer, B. C. & Lala, V. (2020). "A customer-focused approach to improve celebrity endorser effectiveness", *Journal of Business Research*, 109, 221–235. <https://doi.org/https://doi.org/10.1016/j.jbusres.2019.11.048>
- Chang, C. (2009). "Being Hooked by Editorial Content: The implications for processing Narrative Advertising", *Journal of Advertising*, 38, 21–34.
- Dessart, L. (2018). "Do ads that tell a story always perform better? The role of character identification and character type in storytelling ads", *International Journal of Research in Marketing*, 35(2), 289–304.
- de Rojas, C., and C. Camarero (2008). "Visitors' Experience, Mood and Satisfaction in a Heritage Context: Evidence from an Interpretation Center", *Tourism Management*, 29 (3), 525–37.
- Mariani, M. M., Mura, M., & Di Felice, M. (2018). "The determinants of Facebook social engagement for national tourism organisations' Facebook pages: A quantitative approach", *Journal of Destination Marketing & Management*, 8, 312–325.
- Filep, S., & Laing, J. (2019). "Trends and directions in tourism and positive psychology", *Journal of Travel Research*, 58(3), 343–354. <https://doi.org/10.1177/0047287518759227>
- Filo, K., & Coghlan, A. (2016). "Exploring the positive psychology domains of well-being activated through charity sport event experiences", *Event Management*, 20(2), 181–199. <https://doi.org/10.3727/152599516X14610017108701>
- Fornell, C. & Larcker, D. F. (1981). "Evaluating Structural Equation Models with Unobservable Variables and Measurement Error", *Journal of Marketing Research*, 18(1), 39–50. <https://doi.org/10.2307/3151312>
- Graburn, N. (2001). "Secular ritual: A general theory of tourism", In V. L. Smith & M. Brent (Eds.), *Hosts and guests revisited: Tourism issues of the 21st century*, New York: Cognizant Communications.
- Green, M. C. & Brock, T. C. (2000). "The role of transportation in the persuasiveness of public narratives" [Article], *Journal of Personality and Social Psychology*, 79(5), 701–721. <https://doi.org/10.1037/0022-3514.79.5.701>
- Grigsby, J. L., Jewell, R. D. & Zamudio, C. (2023). "A Picture is Worth a Thousand Words: Using Depicted Movement in Picture-Based Ads to Increase Narrative Transportation", *Journal of Advertising*, 52(4), 594–612. <https://doi.org/10.1080/00913367.2022.2077267>
- Hair, J., Black, W., Babin, B. & Anderson, R. (2018) *Multivariate Data Analysis: Global Edition* (8th ed.). Annabel Ainscow.
- Hosany, S. Prayag, G., Deesilatham, S., Causevic, S., Oden, K. (2015). "Measuring Tourists' Emotional Experiences: Further Validation of the Destination Emotion Scale", *Journal of Travel Research* 54 (4), 482–95
- Hosany, S., & D. Gilbert. (2010). "Measuring Tourists' Emotional Experiences toward Hedonic Holiday Destinations", *Journal of Travel Research*, 49 (4), 513–26
- Jenkins, O.H. (1999). "Understanding and measuring tourist destination images", *International Journal of Tourism Research*, 1 (1), 1–15.
- Kim, J.-E., Lloyd, S. & Cervellon, M.-C. (2016). "Narrative-transportation storylines in luxury brand advertising: Motivating consumer engagement", *Journal of Business Research*, 69(1), 304–313. <https://doi.org/https://doi.org/10.1016/j.jbusres.2015.08.002>
- Kwortnik, R. J., & W. T. Ross. (2007). "The Role of Positive Emotions in Experiential Decisions", *International Journal of Research in Marketing*, 24, 324–35.
- Lee, W., Sung, H., Suh, E., & Zhao, J. (2017). "The effects of festival attendees' experiential values and satisfaction on re-visit intention to the destination: The case of a food and wine festival", *International Journal of Contemporary Hospitality Management*, 29(3), 1005–1027. <https://doi.org/10.1108/IJCHM-10-2015-0559>
- Lu, J., Hung, K., Wang, L., Schuett, M. A., & Hu, L. (2016). "Do perceptions of time affect outbound-travel motivations and intention? An investigation among Chinese seniors", *Tourism Management*, 53, 1–12.

- Muller, T. E., D. K. Tse, and R. Venkata Subramaniam (1991). "Post-Consumption Emotions: Exploring Their Emergence and Determinants", *Journal of Customer Satisfaction, Dissatisfaction and Complaining Behavior*, 4, 13-20
- Patterson, P., Yu, T., & de Ruyter, K. (2006, December 4-6) "Understanding customer engagement in services", In *Advancing Theory, Maintaining Relevance: Proceedings of ANZMAC 2006 Conference*. Brisbane, Vol. 4, No. 6
- Pereira, V., Jyoti, J., & Hussain, S. (2019). "Impact of travel motivation on tourist's attitude toward destination: Evidence of Mediating Effect of destination image", *Journal of Hospitality & Tourism Research*, 46(5), 946-971.
<https://doi.org/10.1177/1096348019887528>
- Phillips, W.J., Wolfe, K.L., Hodur, N.M., & Leistritz, F. (2013). "Tourist Word of Mouth and Revisit Intentions to Rural Tourism Destinations: A Case of North Dakota, USA", *International Journal of Tourism Research*, 15, 93-104.
- Pike, S. & Ryan, C. (2004). "Destination positioning analysis through a comparison of cognitive, affective, and conative perceptions", *Journal of Travel Research*, 42 (4), 333-342.
- Podsakoff, P., MacKenzie, S., Lee, J.-Y. & Podsakoff, N. (2003). "Common Method Biases in Behavioral Research: A Critical Review of the Literature and Recommended Remedies", *The Journal of Applied Psychology*, 88, 879-903.
<https://doi.org/10.1037/0021-9010.88.5.879>
- Ryu, K., Han, H., & Jang, S. (2010). "Relationships among hedonic and utilitarian values, satisfaction and behavioural intentions in the fast-casual restaurant industry", *International Journal of Contemporary Hospitality Management*, 22(3), 416-432.
- Ryu, K., Lehto, X. Y., Gordon, S. E. & Fu, X. (2019). "Effect of a brand story structure on narrative transportation and perceived brand image of luxury hotels", *Tourism Management*, 71, 348-363.
<https://doi.org/https://doi.org/10.1016/j.tourman.2018.10.021>
- Santos, S. & Santo, P. E. (2019). "The effects of collectivism and social network self-congruity on engagement", *Multi Conference on Computer Science and Information Systems, MCCSIS 2019 - Proceedings of the International Conferences on ICT, Society and Human Beings 2019*
- Santos, S., Santo, P. E. & Ferreira, S. (2023). "Video Ad Informativeness and Narrative Structure and Transportation as Antecedents of Brand Choice: A Portuguese Brand Case Study", In *Springer Series in Design and Innovation* (Vol. 27, pp. 553-565). Springer Nature. https://doi.org/10.1007/978-3-031-20364-0_47
- Santos, V.; Ramos, P.; Sousa, B.; Almeida, N.; Valeri, M. (2022) "Factors influencing touristic consumer behaviour", *Journal of Organizational Change Management*, 35(3), 409-429.
- Sirgy, M. J. (2010). "Toward a Quality-of-Life Theory of Leisure Travel Satisfaction", *Journal of Travel Research*, 49 (2), 246-60.
- Su, L., Lian, Q., & Huang, Y. (2020). "How do tourists' attribution of destination social responsibility motives impact trust and intention to visit? The moderating role of destination reputation". *Tourism Management*, 77, Article 103970.
- Van Laer, T., Feiereisen, S. & Visconti, L. M. (2019). "Storytelling in the digital era: A meta-analysis of relevant moderators of the narrative transportation effect", *Journal of Business Research*, 96, 135-146.
<https://doi.org/https://doi.org/10.1016/j.jbusres.2018.10.053>
- Vivek, S. D., Beatty, S. E., & Morgan, R. M. (2012). "Customer engagement: Exploring customer relationships beyond purchase", *Journal of Marketing Theory and Practice*, 20(2), 122-146. <https://doi.org/10.2753/MTP1069-6679200201>.
- Vo Thanh T, Cam Tran T, Dang R (2018). "Satisfaction as a bridge to loyalty in a tourist destination", *Tourism Analysis*, 23(1), 45-60
- Weng, L., Huang, Z., & Bao, J. (2021). "A model of tourism advertising effects", *Tourism Management*, 85, Article 104278
- Wong, J. Y., Lee, S. J., & Lee, W. H. (2016). "Does it affect me? Tourism destination narratives, destination image, and the intention to visit: Examining the moderating effect of narrative transportation", *International Journal of Tourism Research*, 18(5), 458-468.
- Zeng, K. J., Yu, I. Y., Yang, M. X., & Chan, H. (2022). "Communication strategies for multi-tier loyalty programs: The role of progress framing", *Tourism Management*, 91, Article 104460.

Use of online Space and Social Media in Hotel Resorts

Kamil Pícha, Roman Švec and Petra Martišková

University of South Bohemia, Faculty of Economics, Department of Trade and Tourism, Czech Republic

kpicha@ef.jcu.cz

rsvec@ef.jcu.cz

martiskova@ef.jcu.cz

Abstract: The aim of the paper is to verify the individual aspects of hotel online communication by analysing the online activities of hotel resorts and their online activities. The subjects of the research were hotel resorts, which are defined as accommodation facilities that meet the requirements for the hotel category of classification level 3* - 5*. The individual resorts were identified using the Booking.com portal, followed by mapping data. The subject of the investigation was the website content, online activities and services of the website and social media activities. We used content analysis and statistical tests, in particular the correlation coefficient, coefficient of determination or R^2 reliability value, Pearson's correlation coefficient and Spearman's rank. We looked at the intensity of online activity, aspects of social media activity, and other aspects of online communication. The most significant conclusion is the importance and impact of communication messages on social networks. We have concluded that the increased frequency of posts leads to a higher number of followers. We have also confirmed that video posts are more successful in attracting subscribers/followers than other posts.

Keywords: Online communication, Hotel resorts, Social media, e-Marketing

1. Introduction

The importance of online communication of companies, their brand and their products has been gradually growing since the widespread use of corporate websites. This is no different in the hotel industry (Law, 2019; Ibrahim, 2016; Schmidt, Cantalopsand dos Santos, 2008). Then, in the last ten to fifteen years, the importance of social networking and social media has gradually increased. The fact that in the hospitality segment, word of mouth (Litvin, Goldsmith and Pan, 2008; Kandampully and Suhartanto, 2000) is one of the main aspects that play a role in a customer's decision underlines the importance of online communication and social media in this field of business. Social networks have facilitated the rapid production and dissemination of information (Gao and Keller, 2023). Hotels can achieve certain goals through online communication, mainly increasing hotel awareness, improving their image, and increasing customer satisfaction and trust, or brand loyalty (Krizanova et al, 2019). The content and presence in the online environment and social networks may vary according to the hotels' classification levels (stars) and the type of social network (Cunha, Correia and Costa, 2021).

1.1 Tourist behaviour

The evolution of the tourists' behaviour is a main driver of the hotels' activity, of course. Self-organised trips are an increasing phenomenon (Fernández-Herrero, Hernández-Maestro and González-Benito, 2019). That phenomenon, together with several enabling aspects, is changing the sales pattern in the hotel industry (Blal, Singal and Templin, 2018; Rishi and Gaur, 2012) and placing more emphasis on direct presentation to and communication with consumers (see, e.g., Cunha et al, 2021; Krizanová et al, 2019; Christou, 2011). Travel agencies are preferred rather by off-season tourists with longer stays (Boto-García, Zapico, Escalonilla and Pino, 2021).

Online booking availability has secured valuable competitive advantages for the tourism industry, such as lower distribution costs, increased tourist delight, and efficiency (Ghaedi, 2022). The frequency of online booking is rising, even if there are still some barriers or perceived risks related to online payments (San-Martin, Jimenez and Liebana-Cabanillas, 2020). Tourists who use 'new' technologies, such as the internet, SMART phones and social media, strongly prefer online booking (Boto-García et al, 2021).

1.2 Social Media and e-Marketing in the Hotel Industry

Some authors still consider email marketing efficient for addressing many potential customers (Araújo, Pires, Delgado and Santos, 2023; Florićić, 2018; Tse, 2017). However, this depends on the frequency of the messages sent and the willingness of the recipients to open and read the mail (Chaparro-Peláez, Hernández-García and Lorente-Páramo, 2022). According to Lithuanian researchers (Labanauskaitė, Fiore and Stašys, 2020), tourists consider websites, e-mail and social media as the most important communication tools for hotels.

Hotels use social media often only as a promotional instrument rather than to create an interaction (Sánchez-Casado, Artal-Tur, and Tomaseti-Solano, 2019), which is not considered the right way (Garrido-Moreno, García-Morales, Lockett and King, 2018). Using social media networks to interact with hotel guests and facilitate interaction among them at any time and anywhere is an important component of future marketing strategies (Jung, Tom Dieck and Chung, 2018). Interactive media could enhance the attractiveness and effectiveness of the company's relationship marketing effort (Chan and Guillet, 2019). According to Sánchez-Casado et al (2019), relational e-marketing tools open new avenues for marketing policies in hospitality.

Social media influence the way consumers search, decide, and book hotels (Varkaris & Neuhofer, 2017). For hotels, they can play an important role in enhancing customer engagement (Sánchez-Casado et al, 2019). We should admit that the hotels' activities in social medias do not automatically increase traveler satisfaction and purchase intentions (Aluri, Slevitch and Larzelere, 2015). Yet, social media marketing is increasingly seen as one of the main ways of communicating with consumers (Silva, Silva and Rodrigues, 2024).

2. Methods

2.1 Data Collection

The subjects of the research were hotel resorts, which are defined as accommodation facilities that meet the requirements for the hotel category of classification level 3* - 5*. The identification of the resorts was based, among others, on their designation in the offer or on their own websites. It was based on the definition of a hotel resort as a full-service lodging facility that provides access to or offers a range of amenities and recreation facilities to emphasise a leisure experience (Brey 2011) and on the Official Unified Classification of Accommodation Facilities of the Czech Republic. The surveyed hotel resorts are located in the Bohemian part of the Czech Republic. A full statistical survey (investigation) was carried out in the defined area. The individual resorts were identified using the Booking.com portal, followed by map data. Entities that did not meet the definition of a hotel resort were not included in the study population. The analysis set included 77 cases. The subject of the study was website content, online activities and services of the website, and social media activities.

Data on the surveyed hotel resorts was collected from the resorts' websites and social media profiles. The analysis took place over six months in 2024. Namely, data was collected on the booking option on the resort's website, the newsletter subscription option and the basis for potentially identifying the focus on specific market segments. We analysed activity on Facebook and Instagram as the most frequently used social networks in the hotel industry (Zavistic, Zavistic and Bernardic, 2022). The social media profiles were evaluated mainly to determine the number of followers/subscribers and the frequency of posts. For this analysis, post frequencies were calculated as an average value per month.

2.2 Data Analysis

The content analysis method was used to analyse the content of the websites and communication posts. Based on this method, the target customer segments of the studied hotel resorts were identified. In identifying the target segments, the following eleven groups were considered: businesses; young and single; families with children; groups of friends; families without children of higher economic standards; individuals of higher social groups; individuals of higher social groups; senior citizens; women's groups; men's groups; extended families (weddings). The target segments were identified either by specific messages on the website, by the products offered or by the content of messages on social media. Microsoft Excel spreadsheet and R Commander tool were used for statistical analysis. In particular, the correlation coefficient, coefficient of determination or R^2 reliability value, Pearson correlation coefficient and Spearman's rank were used to test the effect of the frequency of hotel resort social media posts on the number of followers.

3. Results

3.1 Hotel Resorts' Online Activities

All explored hotel resorts have their websites. 91% of the resorts surveyed offer online booking. 66% allow online booking on their website. Another 25% allow online booking through a partner entity. 30% of resorts allow newsletter subscriptions (NL). 87% of resorts that have a newsletter offer online booking. 83% of resorts have a Facebook profile, 69% of resorts have an Instagram profile, 62% of resorts have both a Facebook and Instagram profile. The correlation of resort location with post frequency was not confirmed. The overall analysis revealed

a focus on up to nine customer segments. The correlation of targeting with the possibility of receiving newsletters or the frequency of social media posts was not proven.

3.2 Frequency of Facebook Posts And Number of Followers

In the case of the posts on Facebook, we have identified a significant dependence of the number of subscribers on the number of published posts of any kind - $r = 0.43206$; $R^2 = 0.1867$ (see Figure 1). Similarly, we have confirmed the dependence of the number of subscribers on the number of published video posts on Facebook, showing an even closer dependence - $r = 0.69761$; $R^2 = 0.4867$ (see Figure 2).

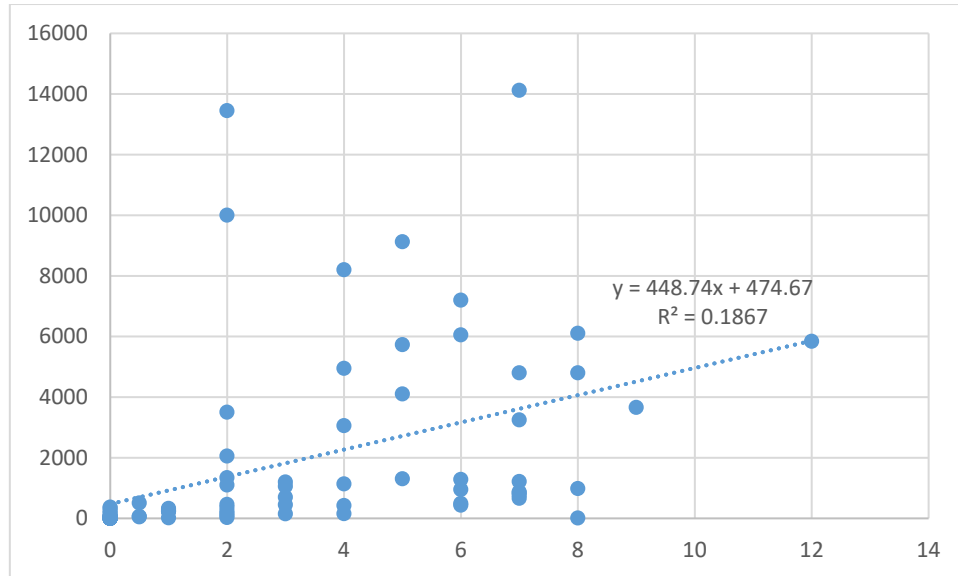


Figure 1: Facebook posts and number of followers

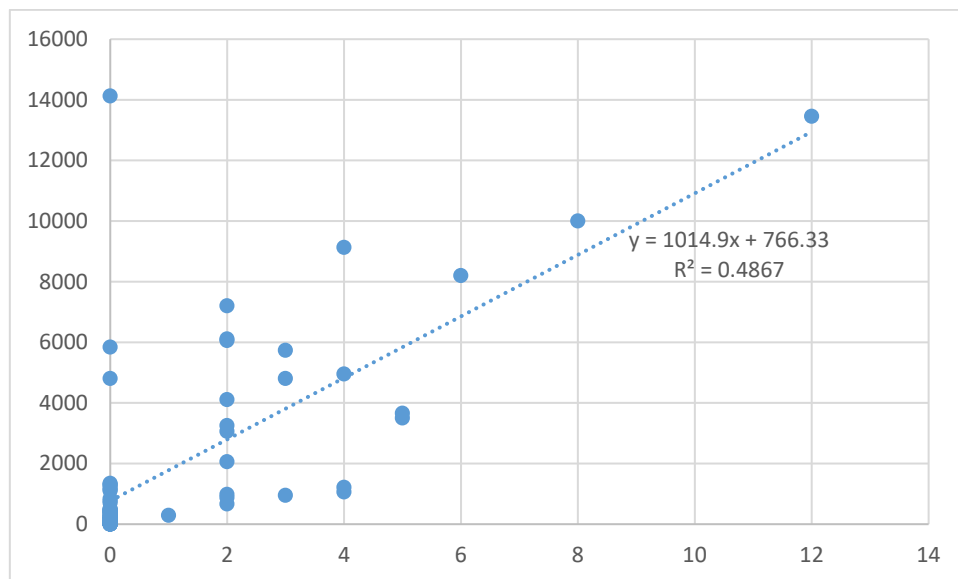


Figure 2: Facebook video posts and number of followers

3.3 Frequency of Posts on Instagram and Number of Followers

Regarding the posts on Instagram, we have identified a significant dependence of the number of followers on the number of published posts of any kind - $r = 0.41501$; $R^2 = 0.1722$ (see Figure 3). Similarly, we have confirmed the dependence of the number of followers on the number of published video posts on Facebook, showing an even closer dependence - $r = 0.60095$; $R^2 = 0.3611$ (see Figure 4).

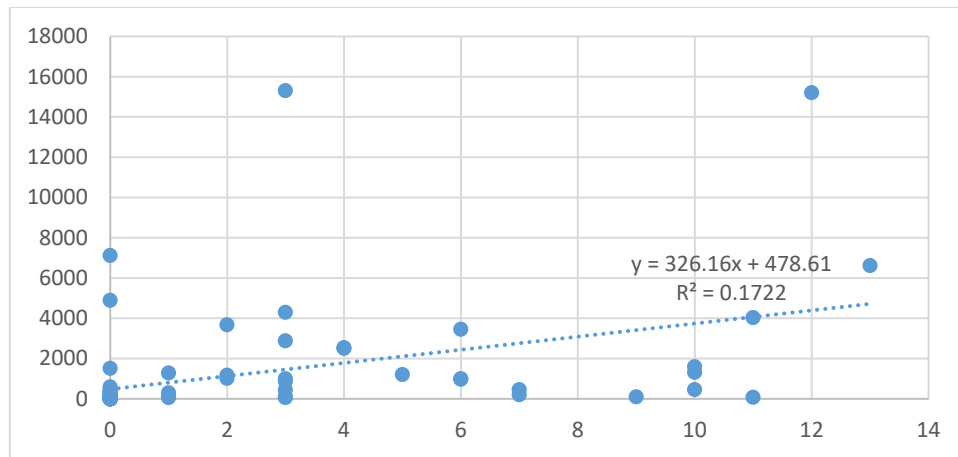


Figure 3: Instagram posts and number of followers

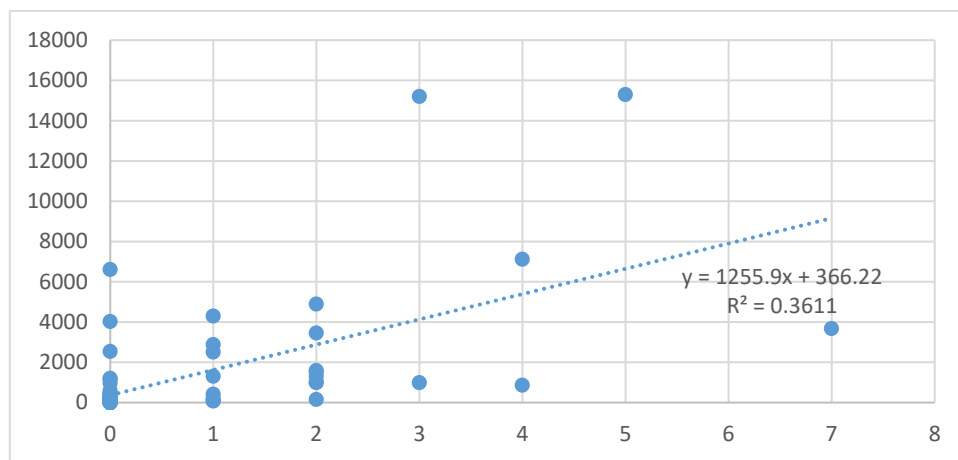


Figure 4: Instagram video posts and number of followers

4. Discussion and Conclusion

The surveyed hotel resorts make only limited use of email marketing in the form of sending a regular newsletter to subscribers. Email marketing and newsletters are considered to be important communication tools, as already mentioned above in the theoretical backgrounds) if sufficient attention is paid to design, size, content and other features (Hudak, Kianičková and Madleňák, 2017). While Aydin (2020) concluded (Mota, Borges, Braga and Brás, 2023; Labanauskaitė, Fiore and Stašys, 2020; Araújo, Pires, Delgado and Santos, 2023; Floričić, 2018; Tse, 2017) that facility location has an effect on overall interaction, in our case we did not confirm the effect of location on post frequency. The possibility of online booking for the vast majority of hotel resorts is consistent with the findings of a study of the benefits of online booking for hotels (Ghaedi, 2022) and the evolution of tourists' preferences (Boto-García et al, 2021).

Social media usage has a positive effect on brand loyalty and e-WOM (Dülek and Aydın, 2020; Seo, Park and Choi, 2020) and improve booking intention (Gomez-Suarez and Veloso, 2024). Aydin (2020) found out the 5-stars hotel had mostly not adopted social media in their communication. In our case, 90% of hotel resorts already have a social media profile. We have not analysed the regularity of posting on Facebook and Instagram and so omitted conclusion of several studies mentioned e.g. by Nummelin (2015) or Kostyk and Huhman (2021) that showed that too irregular posting lowers the Instagram followers' engagement. Iborra Meseguer (2023) suggested there is an optimal frequency of posting to increase customers' engagement levels. Moreover, this optimum varies among particular social media. In our case, we have only concluded that the increased frequency of posts leads to a higher number of followers. We have also concluded that video posts are more successful in attracting subscribers/followers than other posts, which is consistent with the findings of Wagner, Baccarella, and Voigt, (2015) on the text-image-video post attractiveness hierarchy and the suggestion the videos are preeminent among social media content in terms of cost, time and effectiveness (Coronel, 2023). They may also reinforce customers' interest in sharing their own short videos (Polat, Çelik, Ibrahim and Köseoglu, 2023). In further research, it would be useful to observe whether the low level of use of newsletters by hotels is an isolated

or more widespread phenomenon in view of the emphasised continuing importance of e-mail marketing. In light of some of the findings of previous research (e.g., Chaparro-Peláez, Hernández-García and Lorente-Páramo, 2022; Floričić, 2018), the influence of the regularity with which communications are sent must be taken into account. An increasing number of followers based on an increased frequency of posts implies higher customer engagement, but this observed experience needs to be linked to an examination of conversion to hotel bookings. The research should, of course, be extended to examine the impact of responses to customer reviews.

Hotel managers should not underestimate the impact of communication frequency. They should post regularly and pay attention to the possibility of reactions to follower posts. As the results show, video posts are more attractive. It is also advisable to encourage user-generated videos.

AI Statement: We have not used any AI tool in the development of this paper.

Ethics Statement: We did not need any ethical clearance for our research. All data used in the research is publicly available.

References

- Aluri, A., Slevitch, L. and Larzelere, R. (2015). The effectiveness of embedded social media on hotel websites and the importance of social interactions and return on engagement. *International Journal of Contemporary Hospitality Management*, 27(4), 670-689. <https://doi.org/10.1108/IJCHM-09-2013-0415>
- Araújo, C. R., Pires, P. B., Delgado, C. and Santos, J. D. (2023). Persuasive Determinants in the Hotel Industry's Newsletter Opening Rates. *Sustainability*, 15(4), 3358. <https://doi.org/10.3390/su15043358>
- Aydin, G. (2020). Social media engagement and organic post effectiveness: A roadmap for increasing the effectiveness of social media use in hospitality industry. *Journal of Hospitality Marketing & Management*, 29(1), 1-21. <https://doi.org/10.1080/19368623.2019.1588824>
- Blal, I., Singal, M. and Templin, J. (2018). Airbnb's effect on hotel sales growth. *International journal of hospitality management*, 73, 85-92. <https://doi.org/10.1016/j.ijhm.2018.02.006>
- Boto-García, D., Zapico, E., Escalonilla, M. and Pino, J. F. B. (2021). Tourists' preferences for hotel booking. *International Journal of Hospitality Management*, 92, 102726. <https://doi.org/10.1016/j.ijhm.2020.102726>
- Brey, E. T. (2011). A taxonomy for resorts. *Cornell Hospitality Quarterly*, 52(3), 283-290. <https://doi.org/10.1177/1938965510397537>
- Chan, N. L. and Guillet, B. D. (2011). Investigation of social media marketing: how does the hotel industry in Hong Kong perform in marketing on social media websites?. *Journal of Travel & Tourism Marketing*, 28(4), 345-368. <https://doi.org/10.1080/10548408.2011.571571>
- Chaparro-Peláez, J., Hernández-García, Á. and Lorente-Páramo, Á. J. (2022). May I have your attention, please? An investigation on opening effectiveness in email marketing. *Review of Managerial Science*, 16(7), 2261-2284. <https://doi.org/10.1007/s11846-022-00517-9>
- Christou, E. (2011). Exploring online sales promotions in the hospitality industry. *Journal of Hospitality Marketing & Management*, 20(7), 814-829. <https://doi.org/10.1080/19368623.2011.605038>
- Coronel, M. (2023). Destination Promotional Videos On Youtube: Assessing Audience Engagement. *Deturope*. 15(1), 47-65. <https://doi.org/10.32725/det.2023.003>
- Cunha, M., Correia, R. and Costa, A. (2021). Social networks relevance as a promotion tool in the hotel industry: the case of Porto hotels. In *37th International Business Information Management Association Conference (IBIMA)* (pp. 6194-6204). Ibima. <https://doi.org/10.5171/2021.871699>
- Dülek, B. and Aydın, İ. (2020). Effect of social media marketing on e-wom, brand loyalty, and purchase intent. *Bingöl Üniversitesi Sosyal Bilimler Enstitüsü Dergisi*, (20), 271-288. <https://doi.org/10.29029/busbed.734350>
- Fernández-Herrero, M., Hernández-Maestro, R. M. and González-Benito, Ó. (2019). Effects on the "self-organisation-satisfaction" relationship of changes in the economic context. *Asia Pacific Journal of Tourism Research*, 24(7), 658-668. <https://doi.org/10.1080/10941665.2019.1614082>
- Floričić, T. (2018). Digital tourism promotion and Email marketing. In *Innovation Management, Entrepreneurship and Sustainability (IMES 2018)* (pp. 317-331). Vysoká škola ekonomická v Praze.
- Gao, F., Keller, V. (2023). Analysis of Research Trends in Digital Media and Urban Branding: Insights from CiteSpace (2013-2023). *Deturope*. 16(1), 131-152. <https://doi.org/10.32725/det.2024.007>
- Garrido-Moreno, A., García-Morales, V. J., Lockett, N. and King, S. (2018). The missing link: Creating value with social media use in hotels. *International Journal of Hospitality Management*, 75, 94-104. <https://doi.org/10.1016/j.ijhm.2018.03.008>
- Ghaedi, M. (2022). Tourists' booking behavior: Online social media perspectives. *Journal of Promotion Management*, 28(6), 702-728. <https://doi.org/10.1080/10496491.2021.2015509>
- Gomez-Suarez, M. and Veloso, M. (2024). Enhancing social media engagement by the hospitality industry: The power of customer experience dimensions. *Journal of Vacation Marketing*, 30(2), 311-326. <https://doi.org/10.1177/13567667221135195>
- Hudak, M., Kianičková, E. and Madleňák, R. (2017). The importance of email marketing in e-commerce. *Procedia engineering*, 192, 342-347. <https://doi.org/10.1016/j.proeng.2017.06.059>

- Iborra Meseguer, M. (2023). Examining the relationship between engagement rate and frequency of posts in various sectors and its classification. Madrid, Comillas Pontifical University.
- Ibrahim, M. (2016). Evaluating hotel websites as a marketing communication channel: A dialogic perspective. *Information Development*, 32(3), 718-727. <https://doi.org/10.1177/0266666915570506>
- Jung, T. H., Tom Dieck, M. C. and Chung, N. (2018). Determinants of hotel social media continued usage. *International Journal of Contemporary Hospitality Management*, 30(2), 1152-1171. <https://doi.org/10.1108/IJCHM-02-2017-0068>
- Kandampully, J. and Suhartanto, D. (2000). Customer loyalty in the hotel industry: the role of customer satisfaction and image. *International journal of contemporary hospitality management*, 12(6), 346-351. <https://doi.org/10.1108/09596110010342559>
- Kostyk, A. and Huhmann, B. A. (2021). Perfect social media image posts: Symmetry and contrast influence consumer response. *European Journal of Marketing*, 55(6), 1747-1779. <https://doi.org/10.1108/EJM-09-2018-0629>
- Krizanova, A., Lăzăroiu, G., Gajanova, L., Klietkova, J., Nadanyiova, M. and Moravcikova, D. (2019). The effectiveness of marketing communication and importance of its evaluation in an online environment. *Sustainability*, 11(24), 7016. <https://doi.org/10.3390/su11247016>
- Labanauskaitė, D., Fiore, M. and Stašys, R. (2020). Use of E-marketing tools as communication management in the tourism industry. *Tourism Management Perspectives*, 34, 100652. <https://doi.org/10.1016/j.tmp.2020.100652>
- Law, R. (2019). Evaluation of hotel websites: Progress and future developments (invited paper for 'luminaries' special issue of International Journal of Hospitality Management). *International Journal of Hospitality Management*, 76, 2-9. <https://doi.org/10.1016/j.ijhm.2018.06.005>
- Litvin, S. W., Goldsmith, R. E. and Pan, B. (2008). Electronic word-of-mouth in hospitality and tourism management. *Tourism Management*, 29(3), 458-468. <https://doi.org/10.1016/j.tourman.2007.05.011>
- Mota, C., Borges, I., Braga, J. L. and Brás, S. (2023, November). The Importance of Digital Marketing in Hospitality: The Case of Hotel Fafense. In *International Conference on Tourism, Technology and Systems* (pp. 533-543). Singapore: Springer Nature Singapore. https://doi.org/10.1007/978-981-99-9758-9_42
- Nummelin, M. (2015). Instagram as a Marketing Tool-A Qualitative Study on Social Media Marketing for Swedish Interior Design SMEs. Jönköping University
- Polat, E., Çelik, F., Ibrahim, B. and Köseoglu, M. A. (2023). Unpacking the power of user-generated videos in hospitality and tourism: a systematic literature review and future direction. *Journal of Travel & Tourism Marketing*, 40(9), 894-914. <https://doi.org/10.1080/10548408.2023.2296655>
- Rishi, M. and Gaur, S. S. (2012). Emerging sales and marketing challenges in the global hospitality industry: A thematic analysis of customer reviews from the world's top two tourist destinations. *Worldwide Hospitality and Tourism Themes*, 4(2), 131-149. <https://doi.org/10.1108/17554211211217316>
- San-Martin, S., Jimenez, N. and Liebana-Cabanillas, F. (2020). Tourism value VS barriers to booking trips online. *Journal of Retailing and Consumer Services*, 53, 101957. <https://doi.org/10.1016/j.jretconser.2019.101957>
- Sanchez-Casado, N., Artal-Tur, A. and Tomasetti-Solano, E. (2019). Social media, customers' experience, and hotel loyalty programs. *Tourism Analysis*, 24(1), 27-41. <https://doi.org/10.3727/108354219X15458295631918>
- Schmidt, S., Cantallops, A. S. and dos Santos, C. P. (2008). The characteristics of hotel websites and their implications for website effectiveness. *International Journal of hospitality management*, 27(4), 504-516. <https://doi.org/10.1016/j.ijhm.2007.08.002>
- Seo, E. J., Park, J. W. and Choi, Y. J. (2020). The effect of social media usage characteristics on e-WOM, trust, and brand equity: Focusing on users of airline social media. *Sustainability*, 12(4), 1691. <https://doi.org/10.3390/su12041691>
- Silva, C., Silva, S. and Rodrigues, A. (2024). Instagram as a Digital Marketing Tool of a Hotel Brand. In *International Conference on Tourism Research* (Vol. 7, No. 1, pp. 390-400). <https://doi.org/10.34190/ictr.7.1.2103>
- Tse, C. M. (2017). *The effectiveness of Direct Marketing: A Survey of hotels in Hong Kong* (Doctoral dissertation, University of Derby).
- Varkaris, E. and Neuhofer, B. (2017). The influence of social media on the consumers' hotel decision journey. *Journal of Hospitality and Tourism Technology*, 8(1), 101-118. <https://doi.org/10.1108/JHTT-09-2016-0058>
- Wagner, T., Baccarella, C. and Voigt, K. I. (2015, December). Antecedents of brand post popularity in Facebook: The influence of images, videos, and text. In *Proceedings of the 15th International Marketing Trends Conference (2016)*.
- Zavistic, Z., Zavistic, S. and Bernardic, D. (2022, January). Social media as crisis communication platform in hotel industry. In *Economic and Social Development (Book of Proceedings)*, 77th International Scientific Conference on Economic and Social Development. pp. 95-107.