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Advances in Tourism, Technology and Systems

Selected Papers from ICOTTS 2023,
Volume 2

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Dália Liberato · José Angel Díaz Rebolledo
Editors

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Preface

This book—*Advances in Tourism, Technology and Systems: Selected Papers from ICOTTS 2023, Volume 2*—from the SIST Series is composed of the best-selected papers accepted for presentation and discussion at the 2023 International Conference on Tourism, Technology and Systems (ICOTTS'23). The ICOTTS is a multidisciplinary conference with a special focus on new technologies and systems in the tourism sector and was held between 2 and 4 November 2023. The ICOTTS'23 was supported by the Anáhuac University, Bacalar, Mexico, and by the International Association for Digital Transformation and Technological Innovation (IADITI).

The International Conference on Tourism, Technologies and Systems is an international forum for researchers and professionals in the tourism sector, which enables the discussion of the latest innovations, trends and concerns in several areas, in the tourism sector, associated with Information Technologies and Systems. It is an event for professionals in the sector, in search of technology solutions, where academics, IT experts and business managers meet to discuss new ideas that help them maximize the potential of tourism business through technology.

The ICOTTS'23 Scientific Committee is composed of a multidisciplinary group of 140 experts who assessed some 298 papers from 24 countries, received for each of the main topics proposed for the conference: (a) Tourism research in providing innovative solutions to social problems; (b) information and communication technologies in hospitality and tourism industry; (c) sustainable tourism; (d) tourism trends; (e) health and wellness tourism; (f) tourism management; (g) marketing strategies in hospitality and tourism industry; (h) hospitality, tourism and foodservice environment; (i) tourism in the different scientific areas; and (j) eTourism and Tourism 2.0.

The papers accepted for presentation and discussion at the conference are published by Springer and will be submitted for indexing by ISI, SCOPUS, EI-Compendex, Google Scholar and Springerlink.

We thank all those who contributed to the ICOTTS'23 conference (authors, committees, workshop organizers and sponsors). We deeply appreciate your involvement and support, which were crucial to the success of the conference.

Porto, Portugal
November 2023

João Vidal Carvalho
António Abreu
Dália Liberato
José Angel Díaz Rebolledo

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Chapter 1

Strategic Management of Cultural Projects—CIM DOURO Training



Ana Branca Carvalho , Susana M. S. R. Fonseca , Ana Guia ,
Miguel Mota , and Milene Carvalho

Abstract Considering the implementation of new forms of strategic management in organizations and the development of competencies, training in the area of cultural heritage has become a priority in the CIM (Inter-municipal Communities). The SMART methodologies and Start Up tools allow creating a commitment to the organization in a holistic vision, which is essential for local development. The 19 municipalities of the Douro region, part of the territorial structure of Intermunicipalities Community (CIMDOURO) have invested in the training of their employees with the aim of equipping them for the new technological realities in the strategic management of cultural projects. This training is based on simplification of processes and improvement of procedures, using digital platforms. The e-learning training took place from January to June 2023. Through online training, our goal is to identify the needs of organizations, particularly municipalities, and their territorial identities, developing strategies for managing cultural projects and creating their own action plans. Currently, employees of various municipalities have the task of developing action plans to study or explore new locations or create networks based on the cultural heritage of these places, promoting sustainability and diversity. This study aims to identify what strategic management of cultural projects is and the need for various territories to use different types of action plans to improve their performance. The case study is limited to the training of employees in the 19 municipalities of the Douro region. The case study was limited to the training of employees in the 19 municipalities of the Douro region. To achieve this objective, a non-probabilistic

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convenience sample of 16 employees was directly involved, representing various municipalities working in the field of heritage and culture.

1.1 Introduction

This article aims to reflect on the importance of strategic management of cultural projects in local municipalities. Local administrations, especially in municipal management, increasingly need to develop a period that is more favourable to the survival of territories and the people living in them, by investing in the training of their assets for the subsequent application of management strategies.

It is necessary to understand how to use new management strategies in the cultural heritage field, simplifying processes and procedures through SMART and Start UP methodologies and tools. With technological advancements and the development of integrations and APIs (Application Programming Interfaces), it is now possible to automatically collect different data and present it in visual format, providing support for strategic decision-making.

Investing in the training of assets, i.e. local administration employees, through e-learning, or distance learning, was one of the strategies used to implement this change with new tools and methodologies [2]. Thus, asset training aims to acquire skills in using tools that allow constant thinking in both short and long term. The goal is to achieve a greater commitment in terms of efficiency versus effectiveness. The difference between these two concepts can be summarized as the difference between “doing things well” (efficiency) and “doing the right things” (effectiveness). Often, managers/employees focus so much on doing things well that they forget to check whether they are doing the right things. The strategic perspective helps find a balance between efficiency and effectiveness.

In this regard, various mechanisms or tools that support action plans, essential for operationalizing asset training in terms of organizational change in the areas of culture and heritage, were analysed. Among these action plans, the 5W 2H tool is used in the SMART and Start UP methodologies, specifically known as Start Where, which has become the most widely used in the training processes. The 5W 2H tool, despite its objectivity and simplicity, is very useful for planning.

Due to the difficulty of providing training by physically gathering assets in one place, distance learning was employed, using both synchronous and asynchronous classes through platforms such as Zoom and Moodle.

The activities had two distinct moments, one focusing on the conceptual part and the other on practical application. To understand the purpose of this study, the article was divided into four parts, starting with the theoretical framework of new forms of strategic heritage and cultural management, highlighting the relevance of collaborative and economic platforms. In the second part, we mention the importance of asset training through e-learning, focusing on the case study of CIMDOURO and its 19 municipalities. It is crucial to see whether this strategy works, as it involves synchronous and asynchronous activities and training.

Subsequently, the methodology is presented, followed by the presentation and discussion of the results obtained, concluding with final considerations.

1.2 Strategic Management of Cultural Facilities—Concepts and Practices

The construction of organizational identity is a key point for successful management, depending on the alignment between organizational culture (“who we are”), stakeholders’ perception (“how we are seen”), and strategic vision (“who we want to be and how we want to be seen”) [10, 15].

1.2.1 Strategic Management of Cultural Facilities

Some research highlights the importance of identity, branding [5], national [13], or territorial identity context [3, 4].

One of the significant mistakes of local administration organizations is expending considerable effort on activities that are not relevant to their core business, neglecting the development of appropriate action plans.

A comprehensive strategic analysis is the foundation of strategy formulation, which can be subdivided into four levels: functional, business, organizational, and international. These levels arise from the fact that organizations/companies consist of businesses that, in turn, consist of functions. The international level exists in organizations/companies that have businesses in more than one country.

As mentioned earlier, formulating a strategy does not guarantee its realization. Strategy implementation is the process of transforming intended strategies into realized strategies, composed of integration, organizational structure, control, and leadership [6]. Achieving a complete strategy implementation requires various forms of integration. One of them is the integration of existing elements within the organization necessary for implementing the intended strategy. Another form of integration is linking functions to businesses, businesses to companies, and international operations to multinational enterprises. However, the most critical aspect is integrating short-term objectives with the long-term objectives described in the organization’s mission and vision. Strategy implementation demands certain prerequisites such as delegating responsibilities, establishing communication channels, etc. Based on these requirements, managers establish the necessary organizational structure for implementation [7]. During this process, control is necessary for two reasons: to maintain efforts focused on the same objective and to make adjustments whenever necessary due to unforeseen circumstances.

Strategic management of cultural facilities aims primarily to organize the contributions that various areas of cultural heritage have to offer to the organization, serving

as a guiding line for integrating the efforts developed by various specialists and collaborators dispersed throughout the organization.

To achieve this, it is essential to understand what Key Performance Indicators (KPIs) are. These management tools allow for the verification of the level of performance or success of an organization in a specific or overall goal, contributing to systematic monitoring of objectives so that managers/employees of an organization can assess whether they are on the right track.

The intended strategies should function as guiding principles for how the organization works to achieve its purposes. These guiding principles take the form of policies or plans. Policies are essentially guidelines that indicate limits or restrictions on what is desired to be achieved, while plans refer to the means used to reach certain ends. Due to the critical nature of time, it is often explicitly or implicitly mentioned.

One methodology for setting goals is called SMART—specific, measurable, attainable, relevant, and time-bound. SMART methodologies, combined with Start Up methodologies, promote a change in organizational culture and create more effective and efficient management strategies, with the sentence Where to Start.

The means used to manage action plans can be rules or even the organization's culture, which influences the behaviour of its collaborators (Fig. 1.1).

We can perceive that, increasingly, the management of cultural facilities is an activity that lies at the heart of practice and research within broader concerns about organizations, management, and the economy in the cultural and creative context [11, 14, 16].

These facilities are associated with territories and belong to local administration. In this sense, the territory represents, based on its material characteristics and relationships, not an unequivocal identity, but an identity potential that can be taken in various forms, according to the system of meanings (cultural relations) and the form of power organization (political relations) adopted by individuals.

The territory can present itself both as a physical environment, without which the development of social relations cannot be conceived, and as a product of these same social relations, in an uninterrupted and dynamic interrelationship between the concrete and the symbolic.

Territorial identity is conceived here as a social construction. It is related to ethnic, cultural, economic, political attributes, religious preferences, political choices, aesthetics, and sexuality, rather than being something fixed and defined. Territorial identity is built in the cultural and political relations that social groups establish in the territory.

Cultural organizations/structures associated with these territories are leveraging new information and communication technologies to reposition themselves and ensure their sustainability in a tourism industry governed by new patterns and scales of competition. In this context, technology becomes the vehicle that guarantees efficiency and motivation for people.

The work processes and organization of a given institution involve the systematic and permanent use of interconnected information systems. By doing so, it becomes easier to preserve and leverage the “identity” of the institution.



Fig. 1.1 Instruments and SMART methodologies associated with Start UP methodologies.
 Source In 5S-Work Flow Management on Enterprise Excellence Deployment, Rick Hepp, BPM Institute.Org. <https://www.bpminstitute.org/resources/articles/5s-work-flow-management-enterprise-excellence-deployment>

Thus, managing these organizations represents many territorial and identity challenges for their managers, as the information system can be the primary platform for knowledge transmission and performance evaluation, both individual and collective.

Today, there are platforms that utilize technology and open data, adopt more participatory and even cooperative governance models (“platform cooperativism”), measure their negative externalities (social, environmental), and are financed with ethical capital and/or collective participation funding.

Cultural facilities can be defined as “buildings intended for cultural practices” (theatres, cinemas, libraries, galleries, cultural centres, concert halls, museums, etc.) that play a relevant social, economic, and cultural role in creative territories.

Digital structures and collaborative platforms in the strategic management of cultural facilities need to simplify processes and procedures through efficient and effective management mechanisms and instruments.

1.2.2 The Platform Economy and Collaborative Economy

The objective of this work is to understand, discuss, and propose strategies for managing cultural facilities that fully consider the territory and its identity characteristics. The most simplified approach will be through the creation of action plans, that is, instruments and methodologies that allow the execution of these plans.

As mentioned in the previous section, it is relevant to structure information and communication networks capable of making management strategies work. One of the possible solutions is the use of platforms.

The common platform economy is an emerging model based on the collaboration of communities of contributors who, using digital platforms, develop common resources with shared ownership and become accessible as a public good.

The collaborative economy consists of production, consumption, or financing models based on intermediation between supply and demand generated in relationships between peers (P2P or B2B), or from individuals to professionals, through digital platforms that do not provide the underlying service, resulting in a better use of existing but underutilized assets and resources.

In this way, it is possible to do more with fewer resources by using them more efficiently. The principle that access is better than ownership is promoted, creating greater abundance in society (absolute when goods are digital and relative when goods or services are physical).

With these practices, the public administration can also do more with less, developing its own action plans and structuring networks [1].

Through digital platforms, citizens can generate income by using their assets and/or their time and skills discontinuously, without contracts, and with a different degree of subordination on each platform, which raises the question of the need for new regulatory frameworks to consider these new modes of production and employment.

Objetivo deste trabalho é perceber, discutir e propor estratégias de gestão de equipamentos culturais que consideram plenamente o território e as suas originalidades identitárias. A forma mais simplificada será através da criação de planos de ação, ou seja, instrumentos e metodologias que permitam a execução desses planos.

1.2.2.1 Action Plans and the 5W 2H Mechanism

An action plan is a mechanism that aims to simplify and expedite the processes of a project, while ensuring that no step is overlooked.

Action plans are essential for implementing strategies and objectives in an organization. They are detailed documents that describe specific steps that need to be taken to achieve goals and solve problems. Action plans typically include information such as the activities to be performed, the individuals responsible for each activity, deadlines for completion, required resources, and success indicators.

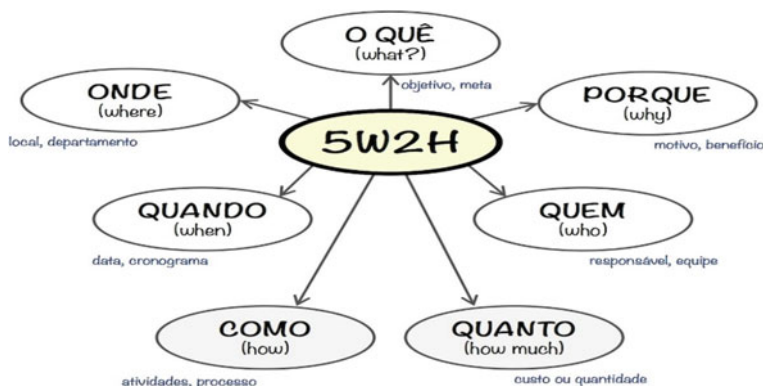


Fig. 1.2 Action plans and the 5W 2H mechanism. *Source* In 5S-Work Flow Management on Enterprise Excellence Deployment, Rick Hepp, BPM Institute.Org. <https://www.bpminstitute.org/resources/articles/5s-work-flow-management-enterprise-excellence-deployment>

With proper strategic planning, it is possible to know exactly where to start and which steps to follow. Therefore, it should be designed with a focus or objective that will guide the entire process.

The use of the 5W 2H helps in the practical definition of actions, and it serves to discard objectives that do not contribute to the maintenance and growth of the organization/company (Fig. 1.2).

The 5W 2H mechanism is a useful tool to assist in the creation of clear and comprehensive action plans. The terms 5W and 2H represent specific questions that should be answered when developing an action plan:

What (What will be done?): Clearly define the activity or task to be performed.

Why (Why will it be done?): Explain the purpose or reason why the activity is important and how it contributes to larger objectives.

Who (Who will do it?): Identify the individuals or teams responsible for executing the activity.

When (When will it be done?): Define the deadlines and sequence of activities to ensure the plan is implemented in a timely manner.

Where (Where will it be done?): Specify the location or context in which the activity will be carried out.

How (How will it be done?): Detail the methods or approaches for executing the activity.

How much (How much will it cost?): Provide information about the financial resources required to carry out the activity.

These answers provide a clear and comprehensive guide for the successful implementation of action plans.

1.2.2.2 The Advantages of 5W 2H

The advantages of using the 5W 2H mechanism in creating action plans are numerous:

Clarity: The 5W 2H mechanism provides a clear framework for developing action plans, ensuring that all essential information is addressed and understood straightforwardly.

Comprehensiveness: By answering the specific questions of what, why, who, when, where, how, and how much, the action plan becomes comprehensive, considering all relevant aspects for activity execution.

Precision: Through these questions, it is possible to detail activities, objectives, and responsibilities, making the plan more precise and specific.

Guidance: The 5W 2H mechanism guides the team in the right direction, avoiding deviations or unnecessary activities that do not contribute to the organization's larger objectives.

Decision-Making: Considering the necessary financial resources (how much), managers can make more informed and efficient decisions regarding budget and resource allocation.

Strategic Planning: Using 5W 2H is aligned with the organization's strategic planning, ensuring that action plans are in line with overall goals and objectives.

Effective Communication: The mechanism facilitates communication among team members, as everyone has clarity on what needs to be done, who is responsible, and when it should be accomplished.

Monitoring and Control: The answers provide parameters for evaluating progress and performance, enabling the monitoring and control of the action plan.

Efficiency: The structure provided by 5W 2H increases efficiency in planning and execution, saving time and resources.

In summary, the 5W 2H mechanism is a valuable tool that helps create action plans in an organized, comprehensive, and effective manner, contributing to the success and achievement of the organization's objectives.

The advantages of using the 5W 2H mechanism in creating action plans are numerous:

Application in different scenarios and departments of an organization, for operational, strategic, or tactical purposes

Extensive detailing of goals.

Allows constant adaptation and reinvention.

Optimizes time.

Provides agility, clarity, and guidance to the team involved in the project.

Reduces costs by eliminating excessive trial and error.

Decreases expenses by using company resources effectively.

The 5W 2H is versatile, and it can be combined with other management tools: SWOT analysis, Ishikawa diagram, etc.

1.3 Case Study

The case study was based on a proposal for the Recovery and Resilience Facility (RRF), followed by a protocol and project developed between CIMDOURO and the Polytechnic Institute of Viseu, Lamego School of Technology and Management. This proposal was founded on the phase of Prioritization and Strategic Definition carried out through a “Collaborative Online Operationalization Journey of the 2020–2023 Strategy”.

This project aims to measure the competitiveness of organizations by evaluating the value added and delivered to the customer or the target audience to whom the services or products offered in the CIMDOURO territory are directed. It was considered that acting on the components and decisive qualities of the intellectual capital ensures this competitiveness, which, in a way, is synonymous with competence—people, processes, and technologies—and agility.

We can say that the adaptability of organizations to the constantly changing external environment depends on how the “mix” of people, processes, and technologies is managed. Managing this “mix” will enable organizations to handle risk, while simultaneously planning for change, which is highly recommended in such cases.

1.3.1 Methodology

Analyses were conducted in the 19 municipalities belonging to CIMDOURO. CIM is an Intermunicipal Community that, according to the Legal Regime of Local Authorities and Intermunicipal Entities, coordinates the network of these 19 municipalities. Almost all projects with European funding go through this associative entity.

After an initial contact, the possibility of providing distance training to their employees in the areas of tourism, culture, and heritage was offered to the Municipal Councils. A pre-registration was conducted for the existing modules associated with a Short Course of 270 h, called “CIMDouro Active Training”. These 270 h included three modules and submodules (Table 1.1).

1.3.2 Results and Discussion

No Módulo de Gestão de Equipamentos e Projetos Culturais—Submódulo de Gestão Estratégica de Projetos Culturais, estiveram presentes 32 colaboradores pertencentes a 12 concelhos (Sabrosa, Alijó, S. João da Pesqueira, Vila Real, Lamego, Armamar, Santa Marta de Penaguião, Murça, Peso da Régua, Carraceda de Ansiães, Sernancelhe, Penedono) (Table 1.2).

Table 1.1 Modules and submodules

Módulos	Submódulos	Horas	Aulas
Informação Turística	M1—Planeamento Turístico	20	Online
	M2—Técnicas e Tecnologias de Aplicação	20	Online
	M3—Itinerários Turísticos	20	Online
		30	Saída de Campo
Gestão de equipamentos e de projetos culturais	M1—Desafios contemporâneos de programação cultural	20	Online
	M2—Gestão estratégica de projetos culturais	20	Online
	M3—Financiamento de equipamentos e projetos culturais	20	Online
		30	Saída de Campo
Técnicas de interpretação do património cultura	M1—Turismo e Património	20	Online
	M2—Interpretação do Património	20	Online
	M3—Técnicas de aplicação na Interpretação do Património	20	Online
		30	Saída de Campo

In 5S-Work Flow Management on Enterprise Excellence Deployment, Rick Hepp, BPM Institute.Org. <https://www.bpminstitute.org/resources/articles/5s-work-flow-management-enterprise-excellence-deployment>

Table 1.2 Municipalities and inscriptions

	MUNICÍPIOS	18	Moimenta da Beira
1	Lamego	19	Lamego
2	Lamego	30	Sabrosa
3	Lamego	21	Sabrosa
4	Santa Marta de Penaguião	22	Sabrosa
5	Santa Marta de Penaguião	23	Sabrosa
6	Santa Marta de Penaguião	24	Alijó
7	Sabrosa	25	Alijó
8	Sabrosa	26	Alijó
9	Sabrosa	27	Alijó
10	Vila Real	28	Alijó
11	Vila Real	29	Peso da Régua
12	Vila Real	30	Peso da Régua
13	Vila Real	31	Sernancelhe
14	Murça	32	Carrazeda de Ansiães
15	Penedono		
16	Penedono		
17	Moimenta da Beira		

In 5S-Work Flow Management on Enterprise Excellence Deployment, Rick Hepp, BPM Institute.Org. <https://www.bpminstitute.org/resources/articles/5s-work-flow-management-enterprise-excellence-deployment>

In this submodule, programmatic contents were worked on, resulting in the elaboration of action plans.

Five groups were created, associating municipalities, and several works and action plans were developed based on the implementation of the 5W 2H methodology.

The 5W 2H methodology was applied, using the seven key questions:

What: What needs to be done?

Why: Why does it need to be done?

Who: Who will do it?

Where: Where will it be implemented?

When: When should it be done?

How: How will it be carried out?

How much: How much will this project cost?

Other action plans resulted from the work carried out. As an example of the activity made by the trainees and developed based on the concepts acquired, methodologies, and tools of SMART and Start Up.

Municípios	Projeto	Plano de ação	Metodologia
	Cultura 4you	4 municípios	5W 2H

Plano de ação

O quê?	Criação da Agenda de Eventos entre 4 municípios limítrofes—Cultura 4you
Porquê?	Para evitar sobreposições de ações e racionalizar recursos
Onde?	Física e Online
Quando?	Com início no mês de outubro de 2023
Quem?	Municípios de Armamar, Tabuaço, Moimenta da Beira e Tarouca
Como?	Criação de um plano de atividades entre os 4 municípios no mês de outubro e gestão e respetiva gestão por técnicos de cada município
Quanto?	100.000 €

One of these action plans led to the implementation of a project in the municipality of Armamar called “Interpretative Center of the Women of the Douro”.

Other projects and action plans were implemented, and the creation of an inter-municipal network is projected. The applications and examples of 5W 2H can be used to propose action plans in different contexts. By employing this tool, employees will have more clarity on the necessary steps to achieve an objective, in addition to easily controlling each action.

1.4 Conclusions

The training of assets in the field of cultural equipment management is essential for the success and improvement of these institutions. Throughout this study, it became evident that strategic management is fundamental for the development and sustainability of these cultural facilities, especially when they are associated with territories and belong to local authorities.

The use of the 5W 2H methodology proved to be a valuable tool for creating clear, comprehensive, and effective action plans. By answering specific questions of what, why, who, when, where, how, and how much, the action plans become more precise and targeted, guiding the team in the right direction and contributing to effective communication and progress monitoring.

Moreover, the work carried out and the implemented action plans demonstrated the importance of applying the concepts acquired and the SMART and Start Up methodologies. These approaches provided a strategic vision and more efficient and effective management, enabling cultural organizations to adapt to the constantly changing external environment.

With the training of assets and the development of appropriate action plans, it is possible to measure and improve the competitiveness of cultural organizations, ensuring the delivery of value to customers and enhancing overall performance. Proper management of the mix of people, processes, and technologies is crucial for the adaptability and agility of institutions in the face of external challenges.

Looking to the future, the creation of an intermunicipal network for collaboration and cooperation among municipalities is a promising initiative. This network will allow continuous exchange of knowledge and experience, resource sharing, and joint implementation of cultural projects. Through this collaboration, cultural organizations in the region can reach a higher level of success and cultural impact.

In summary, the training of assets in the management of cultural equipment, combined with methodologies and tools such as 5W 2H, SMART, and Start Up, is a crucial path for the growth and strengthening of these institutions. The constant pursuit of excellence in strategic management and collaboration among municipalities promises to bring a prosperous future for the culture and heritage of the region.

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Chapter 2

Effects of Internet Access on Tourist Consumption in Mexican Households



Hazael Cerón Monroy, Carmen Lozano, and José Ángel Díaz Rebolledo

Abstract Internet has become a necessary tool for the Mexican tourism sector, providing travelers the ability to access a wide variety of services and enabling informed decision-making. This study analyzes the impact of tourism consumption in terms of internet access in Mexican households. The aim of this work is to evaluate the influence of internet on the process of tourism decision-making and its relationship with tourism consumption using a semi-logarithmic model with data from the National Survey of Household Income and Expenditure (ENIGH) carried out by the National Institute of Statistics and Geography (INEGI). The survey describes the availability and use of information and communications technologies in households and their use by individuals aged 6 and above in Mexico. The results indicate that households with a higher income show a progressive increase in tourism consumption, package tours, and internet expenditure. Thus, 90% of the population account for 59.1% of tourism consumption 37.5% of tour packages, and 77.9% of internet expenditure. Although tourism increases due to internet use, this rise is inelastic; that is, it does not proportionally increase along with internet access in households.

2.1 Introduction

In the past decades, tourism has expanded considerably and developed into one of the main drivers of global economy. The emergence of an industrial society has led to a transformation of the nature of tourism, which started as a mere vacation activity and has become a mass phenomenon. Simultaneously, globalization and

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post-modernism have contributed to an increase in segmentation, individualization, and tourism demand in a number of areas.

In this context, the Organization for Economic Cooperation and Development (OECD) has underlined the close relationship between globalization and tourism, emphasizing that international tourism has succeeded thanks to the progress of globalization. The OECD has identified a number of related key elements, among them the increased income, the appearance of more efficient and cost-effective means of transport, and the intensive use of information and communications technologies (ICT) [12]. Particularly, internet and e-commerce have been major tools in the tourism area by allowing for business management improvements and providing businesses in the sector more effective means to market and distribute products and services [4].

Therefore, the role of internet in the tourism and travel industry has experienced a significant increase. The development and expansion of internet have been crucial to the improvement of travelers' decision-making. As the use of internet has become increasingly popular, the platform has gradually become an instrumental channel to access information on tourism, services, and products.

Online tourism offers a wide arrange of services and added-value functions that are highly attractive to clients, thus creating a rich and diverse network of tourism services. Through the internet, users can access several options to plan and organize their trips, and they have the chance to obtain detailed information concerning destinations, accommodation, transport, and tourism activities.

This digital environment provides tourists with an interactive platform where they can compare pricing, read travelers' reviews and opinions, book services, and carry out transactions safely. Additionally, the internet has promoted the emergence of specialized services, such as online travel agencies and holiday accommodation platforms that offer greater flexibility and personalized options for travelers. As it does for the international market, the internet has become a necessary tool for the Mexican tourism sector, providing travelers with access to a number of services and promoting informed decision-making.

This interconnectivity has greatly enriched tourists' experiences by offering them a comprehensive platform to satisfy their needs and meet their preferences during the planning and enjoyment of their trips. Still, there is a significant digital gap between rural and urban areas in Mexico. Rural areas often face structural limitations in terms of telecommunications, which hamper access to high-speed and reliable internet service. The lack of connectivity might negatively impact the rural residents' capability to search for information on tourism destinations, online booking, and overall access to tourism services. Then, the following question arises: What is the relationship between internet usage during tourism decision-making process and tourism consumption, according to the data compiled in the National Survey of Household Income and Expenditure (Encuesta Nacional de Ingresos y Gastos de los Hogares, ENIGH) [5].

Therefore, the aim of this work is to analyze the influence of internet on the process of tourism decision-making and its relationship with tourism consumption, using a semi-logarithmic model based on data from ENIGH. We consider that there is a significant relationship between the level of internet usage in the process of tourism

decision-making and the behavior of tourism consumption. We also recognize that this relationship can be adequately modeled by a semi-logarithmic approach using data from ENIGH.

2.2 Literature Review

The tourism industry has experienced a significant transformation thanks to the internet, which has become an essential tool that has promoted the innovative integration of technologies within the sector [10]. The interconnectivity provided by this technology has enriched tourists' experience by providing access to a wide array of services and promoting informed decision-making during the planning and enjoyment of trips. However, there is a marked digital gap between urban and rural areas in Mexico.

According to the research by Martínez-Domínguez and Mora-Rivera [8], there is evidence of a digital gap in terms of internet penetration and usage in rural Mexico, which is in the early stages of internet expansion. It must be noted that internet access in rural areas of Mexico remains at a disadvantage. According to data from the National Survey on Availability and Use of Information Technologies in Households (ENDUTIH), internet users in rural areas of Mexico represent 62.3% of the population against 83.8% in urban areas [5]. These data clearly show the existing digital connectivity gap in rural areas, partially attributed to low population density and longer distances. These factors discourage market players from investing in telecommunications infrastructure [4].

The limited internet access in rural Mexico can affect tourism demand by limiting contact with tourism information, promotion and visibility of local attractions, and reducing the development of tourism infrastructure. Overcoming the digital gap in these areas is likely essential to stimulating tourism and taking advantage of the potential within rural areas as alternative destinations for visitors. The use of internet to obtain information mainly depends on the penetration degree of ICT in areas and the demographic characteristics of the population. According to Martínez-Domínguez and Mora-Rivera [8], there is a greater probability of using the internet among people with digital abilities and women. Furthermore, when analyzing internet usage patterns, it is observed that there are differences regarding age, educational level, type of employment, and geographical location.

In this context, the use of internet promotes the production of relevant information, such as tourists' geographical location, their evaluation of tourism destinations, and other factors linked to the tourism industry. In consequence, internet usage has led to tourism research mostly focused on three primary areas: tourists' movement patterns, their satisfaction and emotions experienced, and destination management [1, 6]

Xu et al. [14] carried out a study to examine the relationship between tourists' socioeconomic characteristics and their behavior. Through the data analysis, the study identified nine indicators of tourism mobility, including factors such as length of stay in a city, spatial extent of activities, locations visited, and travel patterns. In a

related context, Mariani and Baggio [7] proposed a mixed approach to analyze social networks in the context of hotel and tourism research. Their approach combines the analysis of quantitative data and qualitative methods to fully understand the dynamic of social networks within the industry.

Similarly, Aggarwal and Gour [1] propose a model to investigate tourists' perceptions and the underlying reasons to publish relevant content in traveling websites. Their model aims to find the motivations and influences behind tourists' online behavior, shedding light on the factors that drive their participation and information exchange activities on traveling platforms.

In the same context, Carrera and Falcón [2] found that the influence of internet on tourists' decisions can be summarized in four basic points: (a) diversity of available options to select products and services, (b) convenience provided by online payment, (c) delivery agility of services acquired, and (d) abundance of detailed and personalized information on tourism services.

The findings of these research works contribute to the tourism research field by exploring several aspects of tourists' behavior, social networks, and online engagement. They underline how internet usage has transformed the way in which tourists plan and make decisions on their trips. Information availability, easy booking, wide variety of options, and speed of service confirmation have turned the internet into an essential tool for modern travelers who look for more satisfactory and personalized tourism experiences.

2.3 Materials and Method

To evaluate the effect of internet on tourism, we used tourism consumption as dependent variable. According to the World Tourism Organization (UNWTO), it includes goods and services consumed and related to trips, covering a wide range of products from those inherent to the trip and stay to small purchases of durable goods for personal use and gifts for family and/or friends. As for the independent variable, household expenditure on internet service was selected and controlled by some household variables [11].

The information on household expenditure and income was obtained from the National Survey of Household Income and Expenditure (Encuesta Nacional de Ingresos y Gastos de los Hogares, ENIGH) carried out by the National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía, INEGI). This survey was carried out across the country bimonthly from 1998 to 2012. In this study, the new ENIGH construction from 2012 to 2020 was used. The sampling design of ENIGH ensures a representative sampling of Mexico nationwide.

Two measurements can be considered for household expenses regarding tourism. The first indicator is that related to tour package expenditure, classified with code N004. The second indicator is built from the sum of expenses related to characteristic activities of the sector, such as purchase of transport tickets, online stay reservation, and tourism activities and tour online booking, among others. These indicators were

considered to measure the impact of internet in households and how it prompts users during decision-making and consumption preferences in the tourism sector. The Gini index was used to assess the distribution of both types of expenditure.

To measure the effect of internet access in Mexican households on tourism consumption, we use a semi-logarithmic regression model where some control variables are included, and basically, the effect of access to tourism of households on tourism consumption is measured. It is known that a marginal impact in a linear regression model is usually understood as a change in the expected value of dependent variable Y induced by an additive increase in the explanatory variable of interest X . According to Morais and Thomas-Agnan [9], in nonlinear or semi-log models, the natural amount is the partial derivative of $E(Y)$ with respect to $\log(X)$ (if the logarithm is on the right side of the regression equation) or symmetrically the partial derivative of $E(\log(Y))$ with respect to X in the other case (if the logarithm is on the left side of the regression equation); in both cases, it is called semi-elasticity. Given that log-log and semi-logarithmic models are common in econometry, elasticities and semi-elasticities are often used to measure the impact of covariates. Regarding their application, Dardis et al. [3] state that the semi-logarithmic relationship is adequate to analyze product consumption according to income levels of the population.

The multiple regression analysis was used to estimate the relationship between the dependent variable (tourism consumption) and the independent variable (household internet expenditure) as follows:

$$Y = \exp\left(\sum_{i=1} \beta_i x_i + \varepsilon_i\right), \quad (2.1)$$

where Y represents tourism consumption in households i , X_i is the income of households, β_i represents other household variables, and ε_i is the error term [3].

Ordinary Least Squares (OLS) is a method used to minimize the sum of squared errors to obtain the best linear approximation of a random variable. The Gauss–Markov theorem specifies conditions under which the OLS estimator is the best linear unbiased estimator. These conditions include zero expected error, independence of error terms and independent variables, constant error variance (homoscedasticity), and zero correlation between error terms (no autocorrelation). These assumptions collectively imply that error terms are uncorrelated samples from a normal distribution with zero mean and constant variance (σ^2). In matrix form, we obtain:

$$\mathbb{E}[\varepsilon|X] = \mathbb{E}[\varepsilon] = 0$$

$$\text{Var}[\varepsilon|X] = \text{Var}[\varepsilon] = \sigma^2 I.$$

Testing for normality and homoscedasticity can be done through residual diagnostics after estimating a linear regression model. Methods like standardized normal probability plots and residual versus fitted values scatterplots help assess the distribution and variance of residuals.

To evaluate how well a linear regression model fits observed data, R-squared is a common measure. It quantifies the proportion of variance in observations explained by the model, with values ranging from 0 (no explanation) to 1 (perfect fit). Different formulas for calculating R-squared exist, including one based on the sum of squared differences between estimated and observed values.

Adjusted R-squared corrects standard R-squared for the number of regressors, typically resulting in a smaller value. However, it is not limited to the same range as standard R-squared and can be negative for models with many degrees of freedom [13].

2.4 Results

Tourism in Mexico remains a luxury good since it has been identified that not all the population has access to it. Between 2012 and 2018, an average of 24% of Mexican households presented tourism consumption. In 2020, the situation changed dramatically due to the effects of the pandemic: There was a 12.8% reduction in households; however, internet access is more democratic and is rising.

In 2016, there was a reduction in tourism access, which represented 23.4% of households taking part in tourism activities. However, internet access kept on growing and reached 27.7% of households. In 2018, while the number of households that consumed tourism remained relatively stable at 23.7%, internet availability continued its significant growth and reached 32.1%. Later, in 2020, there was a marked reduction, and only 12.8% of households were able to participate in tourism activities. On the other hand, internet access significantly increased to 45.4% of households (see Fig. 2.1).

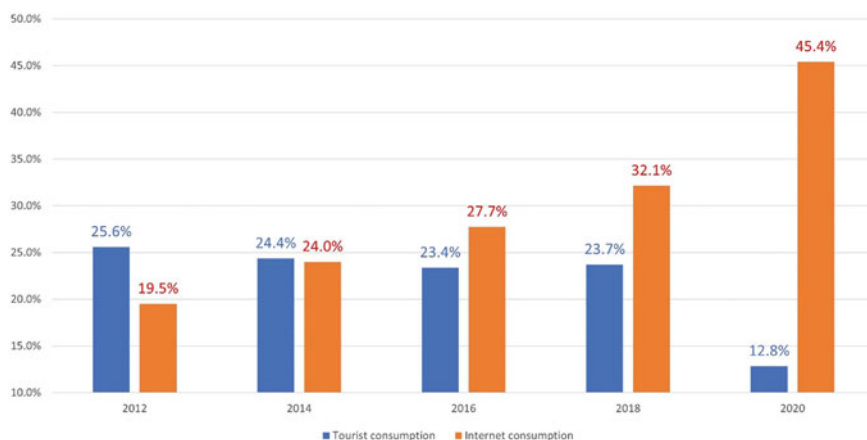


Fig. 2.1 Percentage of households in Mexico having in tourist consumption and internet. *Source* National Household Income and Expenditure Survey (ENIGH) 2012–2020

These data show that, along these years, access to tourism presented certain variability, as a marked reduction in 2020. Meanwhile, access to internet has grown constantly and significantly, especially between 2012 and 2020. This proves the increasing relevance of access to internet in Mexican households and its role in communication, information, and online activities.

A relevant aspect in the analysis is identifying expenditure per decile of household income. In 2012, when only tour packages were quantified, there was a concentration of 70.3% in decile X, which increased to 72.3% in 2014 and was reduced to 65.2% in 2016, 62.5% in 2018, and 62.5% in 2020. In addition, when expenditure in characteristic goods such as transport and entertainment is summed, most of the distribution is still found in decile X but at a lower percentage. In 2012, it was 53.1%, 54.1% in 2014, 50% in 2016, 52.2% in 2018, and 40.9% in 2020. Finally, internet expenses were 22.1% in decile X and 17.1% in decile IX. Therefore, the Gini index for tourism consumption was 0.96 and that of internet expenditure reached 0.64 in 2020 while the same values in 2012 were 0.93 and 0.85, respectively.

Table 2.1 includes only data from 2020 and shows population distribution according to income as well as the concentration of tourism consumption, tour packages, and internet expenditure per decile. The first decile represents the lowest 10% of the population in terms of income where tourism consumption is 2.2%; this shows that the group accounts for a relatively low total tourism consumption. In addition, 0.3% of expenditure on tour packages and 1.9% of internet expenses are consolidated in this bracket.

There is a progressive increase in tourism consumption, tour packages, and internet expenditure as higher deciles are reached. Then, 59.1% of tourism consumption, 37.5% of tour packages, and 77.9% of internet expenditure are concentrated in 90% of the population. Intermediate brackets show a gradual concentration of tourism consumption, tour packages, and internet expenditure as income increases.

Table 2.1 Distribution of tourist consumption, tourist packages, and internet expenses by decile

Population distributed by income level	Income threshold by decile (Dollar)	Tourism consumption (%)	Tourist packages (%)	Internet expenses (%)	Percentage of households with internet access (%)
Decile I	0–141.91	2.2	0.3	1.9	10.6
Decile II	141.95–216.41	2.8	0.4	3.4	18.4
Decile III	216.45–284.82	3.2	0.4	4.9	26.2
Decile IV	284.86–357.68	4.1	0.8	6.5	33.6
Decile V	357.72–442.64	5.3	2.6	8.1	41.0
Decile VI	442.68–543.95	6.4	2.6	9.9	48.4
Decile VII	544–678.82	8.1	6.3	11.9	56.3
Decile VIII	678.86–876.32	10.6	8.9	14.2	63.7
Decile IX	876.36–1248.50	16.4	15.2	17.1	72.7
Decile X	> 1248.50	40.9	62.5	22.1	83.5

This suggests that income levels can affect the consumer’s behavior related to tourism and internet.

It is observed that internet expenditure is progressively higher while tourism expenses keep a more moderate growth. To know whether tourism consumption has increased in households from their internet access, the results confirm a positive effect of both variables. Still, the effect is inelastic since, although more households have internet access, there is not necessarily a proportional increase. Table 2.2 below highlights the results of the regression. Then, Table 2.2 presents the results of the regression model where the dependent variable is tourist consumption. The results are interesting, starting with the effect of having internet at home on tourist consumption. It was found that the elasticity is 0.0804, indicating a positive effect in the relationship, but it is less than one which indicates an inelastic effect, meaning that while the number of households with internet access increases, tourist consumption only increases by 8.04%.

The results obtained from the regression parameters show a significant trend in the impact of the Internet on tourist consumption over time. In 2012, the parameter was 0.055, indicating a modest but positive effect of the Internet on tourist consumption at that time. However, as we move forward in time, there is a gradual increase in the effect of the Internet on tourist consumption.

In 2014, the parameter increased to 0.195, reflecting a higher positive impact of the Internet on tourist consumption. This pattern continued in 2016, with a parameter

Table 2.2 Results of estimation of semi-logarithmic regression model (2020)

Variable	Coefficient	p-value	Std. Err.	95% Conf. Interval	
Internet access	0.080454	0.008	0.0301476	0.0213	0.1395
Education of household head	0.027781	0.000	0.0054595	0.0170	0.0384
Credit card payments	0.128978	0.000	0.0336380	0.0630	0.1949
Government benefits	−0.156906	0.000	0.0278617	−0.2115	−0.1022
Decile II	0.088992	0.007	0.0332253	0.0238	0.1541
Decile III	0.109671	0.000	0.0223669	0.0658	0.1535
Decile IV	0.108091	0.000	0.0166959	0.0753	0.1408
Decile V	0.115130	0.000	0.0130668	0.0895	0.1407
Decile VI	0.107780	0.000	0.0108370	0.0865	0.1290
Decile VII	0.107961	0.000	0.0091635	0.0899	0.1259
Decile VIII	0.109122	0.000	0.0079281	0.0935	0.1246
Decile IX	0.111212	0.000	0.0069426	0.0976	0.1248
Decile X	0.138082	0.000	0.0062168	0.1258	0.1502

$R^2 = 0.1540$, adjusted $R^2 = 0.1529$, $n = 9694$

of 0.218, suggesting that the Internet was significantly contributing to the increase in tourist consumption in Mexican households.

By 2018, the effect of the Internet on tourist consumption remained considerable with a parameter of 0.176. However, in 2020, although the parameter decreased to 0.080, there still remains a positive effect of the Internet on tourist consumption, albeit to a lesser extent compared to previous years.

These results highlight the growing importance of the Internet as a factor influencing tourist consumption decisions in Mexican households. Access to information, ease of making reservations, and the ability to compare prices and travel options through the Internet have transformed the way tourist consumers plan and carry out their trips. Additionally, these findings suggest that the impact of the Internet on tourist consumption continues to evolve over time and is a crucial aspect to consider in the development of tourism promotion strategies and decision-making in the tourism industry in Mexico.

2.5 Conclusions

In summary, there has been a growing effect of internet on tourism consumption along time. The parameters associated to this influence have shown a progressive increase, except in 2020 due to extraordinary circumstances. These findings emphasize the importance of understanding and adapting to the changing dynamics of tourism consumption in the digital age and the increasingly key role that internet plays in travelers' decision-making processes.

The results highlight the importance of understanding how family dynamics affect the access and usage of Information and Communications Technologies (ICT), considering internet connectivity a family asset, while its use is perceived as individual capital. As related to interest and abilities, cost is the main obstacle for internet adoption when there are children under the age of 12 in rural and urban households.

It is observed that internet expenditure is constantly increasing while tourism expenses show a more moderate rise. To determine whether internet usage has led to an increase in tourism consumption among households, the results confirm a positive relationship between the two variables. However, the effect is inelastic, meaning that even though more households have internet access, this does not necessarily result in a proportional increase in tourism expenditure. Then, although internet usage can influence tourism consumption, other factors are also involved in the decision and limit the relationship between both variables.

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Chapter 3

Enhancing Tourist Experiences: Integrating ChatGPT and 360 VR Videos in Tourism and Tourist Psychology



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Abstract Emerging technologies are driving the Fourth Industrial Revolution, heralding a transformative paradigm that significantly reshapes people's daily lives and social interactions. Within the tourism industry, the integration of artificial intelligence (AI) technology and virtual reality (VR) presents promising opportunities to enhance tourist experiences. This conceptual article explores the potential of combining ChatGPT, an AI-powered chatbot, with 360 VR videos to revolutionize the way tourists engage with destinations and make travel decisions. Through this seamless fusion of personalized conversational interactions and immersive virtual experiences, the integration aims to evoke emotions, establish emotional connections, and ultimately enhance overall user satisfaction in the realm of tourism. By effectively implementing ChatGPT and VR technologies, the tourism industry can offer personalized, interactive, and gratifying travel experiences for fostering tourists' positive psychological engagement with destinations and facilitating more informed travel decisions.

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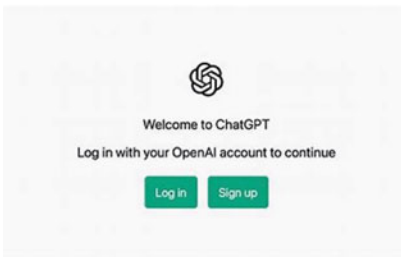
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3.1 Introduction

The tourism industry has witnessed notable advancements in the realms of artificial intelligence (AI) and virtual reality (VR) technologies, leading to significant potential for transforming the way travelers engage with destinations [1, 2]. AI, in particular, has gained prominence due to its capacity to provide personalized experiences. Within the tourism sector, AI-powered chatbots, such as ChatGPT (See Fig. 1a), have emerged as indispensable tools. These chatbots leverage AI algorithms to comprehend and respond to user queries, enabling conversational interactions and tailored recommendations. As travelers increasingly seek customized experiences, the role of AI-powered chatbots becomes significant in delivering personalized information and guidance.

In parallel, the immersive nature of 360 VR videos (See Fig. 1b) has captured the attention of the tourism industry. These videos offer viewers a comprehensive, 360° view of destinations and attractions, thereby providing an experiential journey that transcends traditional two-dimensional media. By enabling users to explore and navigate virtual environments, 360 VR videos possess the potential to profoundly enhance customer engagement and decision-making processes in tourism [3]. This immersive medium allows travelers to experience the sights and ambience of a destination virtually, fostering a sense of presence and enhancing their understanding and connection to the place [4, 5]. Consequently, 360 VR videos play a crucial role in shaping travelers' perceptions, influencing their choices, and enriching their pre-travel experiences.

Considering the dynamic landscape of the tourism industry, the convergence of AI-powered chatbots and 360 VR videos offers exciting prospects. The integration of these advanced technologies has the potential to revolutionize customer experiences by merging personalized assistance with immersive virtual environments. Through AI-powered chatbots, travelers can engage in natural language conversations, seeking information, recommendations, real-time assistance, and sharing travel reflections over the pre-, during, and post-travel stages [6]. Simultaneously, 360 VR videos



[a] ChatGPT official website



[b] 360 VR video*

Fig. 3.1 Screenshots of ChatGPT and 360 VR video. Source https://www.bilibili.com/video/BV1ft4y1Y7MG/?share_source=copy_web

provide a platform for delivering captivating visual experiences that transport users to diverse destinations and enable them to virtually visit the places of interest. The combination of ChatGPT and 360 VR videos holds the promise of transforming the way travelers engage with destinations, enabling them to make more informed decisions, enhancing their pre-travel experiences, and ultimately contributing to the overall satisfaction and enjoyment of their trips.

Based on the previous discussion, this paper illustrates how ChatGPT and 360 VR videos can be applied in tourism and tourist psychology. In the following, we provide readers with theoretical framework to support the implementation of the two emerging technologies in tourism. We also give some general guidelines in effectively using ChatGPT and 360 VR videos in the tourist psychology domain. The conclusion section offers the future research directions in the AI-powerful tourism industry.

3.2 Literature Review

3.2.1 *Tourist Psychology in Tourism Education*

In the context of tourism education, understanding tourist psychology represents one of the most important factors in promoting tourism [7]. Tourist psychology refers to the study of the psychological factors that influence tourists' behaviors, experiences, and decision-making processes. It explores the psychological aspects of tourism, including motivations for travel, tourist satisfaction, destination choice, and the impact of tourism on individuals and communities. The integration of ChatGPT and 360 VR videos in tourist psychology education offers potential benefits, including but not limited to enhanced engagement, increased interactivity, access to diverse perspectives, and opportunities for real-time feedback and guidance.

3.2.2 *Artificial Intelligence (AI) Chatbot*

The implementation of artificial intelligence (AI) technologies has become prevalent in daily lives and learning. The examples of the applications of AI technologies in daily lives include facial recognition, Internet of Things, big data, robots, and others. Large language models (LLMs) have led to a significant advancement in machine learning, specifically in the domain of natural language processing (NLP). NLP utilizes computational techniques for understanding and generating human language content, leading to mimicking humans' learning and thinking styles [8, 9]. In this regard, chatbots are trained using NLP to recognize humans' contextual requests and generate responses to the questions or give solutions to the problems, including the tourism domain [9–14].

One of the highly capable AI chatbots is ChatGPT, a text-based chatbot based on the GPT-3.5 (Generative Pre-trained Transformer) LLMs [15]. ChatGPT was developed by a U.S.-based AI company called OpenAI and was publicly launched in November 2022. It is trained to have text interactions with human beings in a conversational format, such as responding to questions in a prompted manner. According to the ChatGPT homepage (<https://chat.openai.com>), its capabilities include to “remember what user said earlier in the conversation,” to “allow user to provide follow-up corrections,” and to “decline inappropriate requests.” Through these features, ChatGPT has garnered widespread attention from various users in academia and industry sectors. Users are typically impressed by its powerful text-generating capabilities, such as writing stories, answering questions, and providing suggestions [16]. In addition to its robust capabilities, ChatGPT’s user-friendly interface is exceptionally easy to navigate. Users simply type a question or command into a text box at the following web link (<https://chat.openai.com/chat>) after logging in. An answer generated by ChatGPT will appear on the screen within seconds, tailored to your desired format or style. ChatGPT’s ability to respond to various types of questions or prompts has quickly positioned it as cutting-edge technology since its launch [17].

Furthermore, ChatGPT possesses unique capabilities that make it a valuable tool for tourist psychology education. These capabilities include NLP, context-aware responses, and the ability to draw from a vast knowledge base. Such features enable personalized and immersive learning experiences, supporting students in their exploration and understanding of tourist psychology concepts. For instance, Camilleri and Troise [18] highlighted the significance of personalized experiences in the tourism industry and emphasized the role of technology, including AI, in delivering tailored recommendations and services to travelers. They noted that personalized experiences can lead to increased customer satisfaction, loyalty, and positive word-of-mouth. Additionally, previous studies indicated that it is necessary to explore the integration of AI and tourist psychology in a human-centered approach [19, 20].

As discussed in the previous sections, ChatGPT has the potential to leverage individuals’ work efficiency in a variety of tasks and help them become more productive [11, 16]. This can not only augment work production, such as generating content and handling requests in the company but also enhance companies’ competitiveness to meet customers’ needs. Employees in a tourist company collaborate with ChatGPT to improve work efficiency in the fields of creativity, decision-making, and market research, leading to providing better services for customers [6, 18]. Furthermore, previous researchers have indicated the potentials of using AI in the tourism sector [11, 21, 22]. For example, Huang et al. [21] reported that students taking tourist psychology education via ChatGPT have more access to finding solutions, fostering critical thinking skills, developing AI literacy, and more.

Despite its powerful strengths, ChatGPT also has some limitations. First, ChatGPT has knowledge datasets until 2021, possibly resulting in outdated or inaccurate information in its output. Second, ChatGPT may potentially generate biased answers due to the training data [15, 23]. The biased answers offered by ChatGPT could result in the reinforcement of existing societal biases or discrimination. Third, the lack of

understanding human emotions is ChatGPT main limitation. Although ChatGPT is trained on human data, it can only generate output to simulate human languages. It lacks the capacity to understand and recognize the nuances of human emotions [15]. Fourth, ChatGPT sometimes generates false or misleading information, such as fictitious literature citations [24]. Finally, it is worth noting that ChatGPT lacks a voice interface for human–computer interactions. Given these considerations, users are strongly encouraged to cross-verify the information provided by ChatGPT with other reliable sources for the purpose of fact-checking [25]. Relying on additional information sources is essential for ensuring the accuracy of ChatGPT’s output. In the context of tourism, users can explore AI voice assistants as supplementary tools for customer service [8].

3.2.3 360 VR Videos

VR technology has been implemented to demonstrate its potentials in various education and industry settings [2, 4, 26, 27]. The features of VR enable users to create immersive engagement and simulate presence experiences. In educational contexts, students’ curiosity and motivation can be fostered through the participation in the immersive VR learning activities. This activated participation can be an opportunity for igniting students’ interest and involvement in learning and maximizing the potential of VR learning experiences [28]. Among different immersion levels of VR technologies, 360 VR videos offer users to have a sense of full immersion with wearing a head-mounted display (HMD) in a simulated context [29].

360 VR videos, being shot using an omnidirectional camera, are immersive video content that provides viewers with a 360°, panoramic view of their surroundings. That is, viewers can see photos or videos from different directions to create a 360° visual experience. 360 VR videos can be viewed on compatible devices such as smartphones, tablets, computers, and virtual reality headsets, which further enhance the immersive experience. While watching 360 VR videos, users feel part of the scene and experience a sense of immersion, such as feeling like they were walking through the viewed context [3, 30]. This can be achieved by using a 360 camera that captures videos in all angles, and viewers can wear a HMD to watch 360 video content for full immersion. The feeling of immersion or the sensation of “being there” allows viewers to generate a feeling of natural and realistic sense while watching 360 videos on a HMD [2].

360 VR videos are increasingly used in various industries, including tourism, entertainment, journalism, and education. In the tourism sector, 360 VR videos offer a unique way to showcase destinations, attractions, events, and experiences, enabling viewers to virtually visit places and feel as if they are physically present. Researchers have investigated the impact of 360 VR videos on customer engagement, destination marketing, and information recall [4, 5]. For example, previous studies, including by Buhalis et al. [3], Tom et al. [2] and Yung et al. [31], examined the effects of 360 VR videos on tourists’ destination evaluation and decision-making processes. They

found that the immersive nature of 360 VR videos significantly enhanced tourists' destination evaluations, leading to increased interest and intention to visit.

In addition, 360 VR videos have emerged as a powerful tool in evoking emotions and creating emotional connections between tourists and virtual destinations [31, 32]. The immersive and sensory nature of the VR experience allows tourists to engage with the virtual environment in a way that is more captivating and compelling than traditional forms of media [4, 5]. As a result, tourists may experience heightened emotions, such as excitement, awe, or relaxation, which can significantly contribute to a more memorable travel experience.

Furthermore, the immersive quality of 360 VR videos transports tourists to a different reality, enabling them to virtually explore and interact with various destinations, landscapes, and attractions. This heightened sense of presence and realism can evoke a wide range of emotional responses [31, 33]. For instance, while exploring a breathtaking natural wonder through a 360 VR video, tourists may feel a sense of awe and wonder as they witness the grandeur and beauty of the virtual environment. This emotional response can be powerful and leave a lasting impression on the tourists, shaping their positive perception and good memory of a destination [2, 3, 30].

3.3 Theoretical Framework

The Experiential Learning Theory, developed by David A. Kolb in the 1970s, has provided valuable insights into the learning process and has been widely applied in various educational contexts. This literature review explores the existing research related to the Experiential Learning Theory and its application in the context of using ChatGPT and 360 VR videos in tourism and tourist psychology.

3.3.1 *Experiential Learning Theory and Tourism*

The Experiential Learning Theory emphasizes the importance of hands-on experiences and active engagement in the learning process. In the context of tourism, this theory aligns well with the concept of experiential travel where tourists seek immersive and engaging experiences that can foster deep understanding and meaningful connections with destinations [5, 33]. Tourist experiences are not merely passive observations but dynamic interactions that involve both the physical and emotional aspects of exploration [20, 26]. This makes the integration of ChatGPT and 360 VR videos in tourism possible to provide a desired platform for applying the principles of experiential learning that can allow tourists to actively participate, reflect, and internalize their travel experiences.

3.3.2 360 VR Videos and Experiential Learning

Research on 360 VR videos in tourism has highlighted their potential to evoke emotions, enhance engagement, and create realistic and immersive experiences [5]. The multisensory nature of 360 VR videos enables tourists to explore virtual environments as if they were physically present, triggering a sense of presence and spatial cognition [30]. 360° virtual reality (VR) videos facilitate experiential learning by immersing tourists in virtual destinations. This immersive approach aligns with the Experiential Learning Theory, as it provides tourists with tangible and concrete experiences. Tourists actively interact with the virtual environments, making decisions, and acquiring firsthand insights into the destinations they are exploring.

3.3.3 ChatGPT and Personalized Experiences

The integration of ChatGPT, an AI-powered chatbot, with 360 VR videos can further enhance the experiential learning process in tourism. ChatGPT can provide personalized recommendations, real-time assistance, and customized information based on tourists' preferences and needs [11]. The interactive nature of ChatGPT's conversational interactions encourages reflective observation, as tourists engage in meaningful dialogues, analyze the provided information, and make decisions based on personalized insights [22]. This personalized assistance complements the immersive experiences of 360 VR videos, facilitating a holistic and tailored approach to the learning journey.

To sum it up, the Experiential Learning Theory provides a robust framework for understanding the learning process and its application in the context of using ChatGPT and 360 VR videos in tourism and tourist psychology. The literature review has highlighted the alignment of experiential learning principles with the immersive and personalized aspects of this integration. We will discuss the implications of using the two emerging technologies in the tourism sector in the next section.

3.4 Implications of Using ChatGPT and 360 VR Videos in Tourism and Tourist Psychology Education

As an emerging paradigm, the integration of ChatGPT and 360 VR videos shows great potential in enhancing tourist experiences and enriching tourist psychology education. Below are the implications of this novel integration, focusing on its capacity to revolutionize the way tourists engage with destinations and make travel decisions.

1. **Enhanced Personalization and Interactivity in Tourist Experiences:** By seamlessly integrating ChatGPT with 360 VR videos, the tourism industry can provide tourists with personalized and interactive travel experiences. ChatGPT's conversational capabilities enable dynamic interactions, allowing tourists to receive tailored recommendations, travel tips, and real-time assistance, thereby fostering a deeper connection with the destination. This heightened level of interactivity ensures that tourists feel more engaged and actively involved in shaping their travel experiences, resulting in greater overall satisfaction.
2. **Emotional Connections and Positive Psychological Engagement:** One of the most profound implications of this integration lies in its ability to evoke emotions and create emotional connections between tourists and destinations. The immersive nature of 360 VR videos enables tourists to virtually experience the sights, sounds, and ambiance of a destination, generating a sense of presence and emotional engagement. When combined with ChatGPT's conversational interactions, this immersive experience can elicit positive psychological engagement, enhancing tourists' emotional attachment to the destination and fostering lasting memories.
3. **Informed Decision-Making and Empowered Tourists:** The integration of ChatGPT's AI capabilities with 360 VR videos empowers tourists to make more informed travel decisions. As tourists virtually explore destinations through immersive videos, they can seek real-time information and receive personalized recommendations from ChatGPT. This combination of virtual experiences and AI-driven insights equips tourists with a comprehensive understanding of their destination, enabling them to plan their itineraries more effectively and make well-informed decisions, leading to greater satisfaction with their travel experiences.
4. **Enriching Tourist Psychology Education:** Integrating ChatGPT and 360 VR videos holds immense potential for enriching tourist psychology education. In academic settings, this innovative approach can be used to immerse students in real-life travel scenarios, exposing them to diverse tourist experiences and cultural contexts. Through interactive conversations with ChatGPT, students can explore theoretical concepts, apply critical thinking skills, and engage in problem-solving exercises. Such educational applications enable a deeper grasp of tourist psychology, preparing future professionals for the evolving demands of the tourism industry.

The above implications show that the integration of ChatGPT and 360 VR videos in tourism and tourist psychology education can open a promising avenue for transforming tourist experiences and enriching educational practices. As the tourism industry embraces the technological advancements of the Fourth Industrial Revolution, this innovative integration possesses the potential to fundamentally transform how tourists engage with destinations, make travel decisions, and experience personal growth through meaningful interactions. Additionally, this integration can also augment the learning process, equipping students with the necessary skills to navigate the dynamic terrain of the tourism industry and contribute to its sustainable growth and development in educational contexts.

3.5 Conclusion

By combining the use of ChatGPT and 360 VR videos, we focus on gaining a better understanding of integrating emerging technologies in the domains of tourism and psychology. The objective of this paper is to combine the power of AI-driven chatbots and immersive virtual reality experiences for creating more personalized and engaging travel experiences. This integration allows for greater engagement, interactivity, and a sense of personalization, which can contribute to increased customer satisfaction, loyalty, and positive word-of-mouth. Moreover, the two technologies have the potential to serve as an effective pre-travel tool, allowing tourists to explore destinations, make informed decisions, and create meaningful connections with their travel experiences. Through AI chatbots, travelers can receive real-time assistance, tailored recommendations, and engage in natural language conversations, while the immersive nature of 360 VR videos allows them to explore and experience destinations virtually.

In terms of potential avenues for future research, scholars may consider investigating the implementation of prompt strategy instruction to enhance students' proficiency in formulating appropriate questions. This, in turn, could contribute to the attainment of accurate and informative output generated by ChatGPT. Such newly acquired abilities may promote the students' communication skills and cognitive development. Additionally, it is expected to see that all students should possess the skills in properly using AI (AI literacy) for their future jobs, both locally and globally [34]. Despite the promising outcomes observed in the utilization of ChatGPT and 360 VR videos, it is imperative to address the technical, ethical, and privacy challenges that could potentially hinder user experiences. Such an approach is essential for optimizing the potential benefits of this integration within the realms of the tourism industry and education in tourist psychology. As the technology continues to advance and adoption increases, the future of ChatGPT and 360 VR videos in the tourism industry appears promising, reshaping the way travelers explore and experience the world.

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Chapter 4

Residents' Perceptions of Sustainable Tourism Development in an Emerging Destination: A Factor-Cluster Approach



Isabel Vieira , Ana Rodrigues , Elisa Alén , and Miguel Mota

Abstract Despite extensive research into the residents' perceptions of sustainable tourism development (STD) over the past few decades, there has been little exploration of emerging destinations in low-density regions. This study uses a bidirectional analysis to segment the residents of a historic town in the north of Portugal (Lamego), which is part of the Douro World Heritage delimitation. This study applies a factor-cluster analysis to a sample of 250 residents of this historic town on their perceptions of community involvement, local government management of tourism (LGMT), perceived risk, community attachment, tourism impacts, economic dependence, and support for STD. Residents were clustered according to their community involvement and their perceptions of the effectiveness of LGMT. The findings reveal that three clusters of residents were identified: 'Advocates,' 'Disinterested,' and 'Conditional supporters.' The findings support that these groups exhibit dissimilar levels of community attachment, perceived tourism benefits, economic dependence, and support for STD. The three clusters had no significant differences regarding perceived costs and perceived risk. Furthermore, there are significant differences between the three clusters based on almost every socio-demographic variable used. The results reinforce the importance of analyzing the residents' perceptions in the

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planning and decision-making policies for STD. Contributions of these findings to the body of knowledge and managerial implications are discussed.

4.1 Introduction

Several studies have been developed on the residents' perceptions of support for tourism development, community involvement and attachment, tourism impacts, and economic dependence based on sustainability principles (economic, socio-cultural, and environmental). Nevertheless, the studies have been, to some extent, limited in terms of approaches, namely concerning the contribution and participation of residents (community involvement) in the creation and implementation of sustainable tourism. A necessary prerequisite for developing more sustainable approaches to tourism lies in understanding how resident communities are involved and participate in implementing tourism programs and practices.

In this context, this study aims to evaluate residents' perceptions of sustainable tourism development (STD) and related concepts in an emerging destination located in a low-density region (a historic town in northern Portugal located in a World Heritage Site). This study has two main objectives. First, the study aims to segment residents based on their involvement in the community and their perception of the effectiveness of the management of tourism activity by the local government. Second, it intends to identify the extent to which those resident groups share similar/different levels of community attachment, perceived risk, perceived tourism impacts, economic dependence, and support for STD.

In addition to this introduction, the paper includes five additional sections: a brief literature review, an explanation of the methodological procedures, a presentation of the main results of the study, a discussion of the results, and a conclusion.

4.2 Literature Review

This section deals with the literature review of the study. It reviews the main constructs to be analyzed (STD; resident's support; community involvement; LGMT; perceived risk) and other variables commonly used in studies on residents' perceptions (community attachment; tourism impacts; economic dependence).

4.2.1 *STD and Resident's Support*

STD considers economic, social, and environmental impacts, the sector's needs, the receiving communities, visitors, and the environment [1]. In today's time, stakeholders such as local governments, politicians, and heritage managers, among others,

tend to view the integration of residents in destination management and planning as vital, as this group is considered a key pillar for STD [2]. In this sense, the rights and demands of local communities are increasingly considered. However, there is a long way to go in using innovative strategies that motivate the involvement of local people in tourism decisions, planning, and management [3]. Their support becomes indispensable for STD [4]: it depends significantly on how local people perceive tourism, their connection to the community, their trust in the various stakeholders, and mainly on the way local government manages the tourism sector [5].

4.2.2 Community Involvement

Community involvement is vital to building a sustainable tourism model [6]. Thus, many of the problems linked to management are related to the level of involvement of residents in the tourism development of a destination [7]. The importance of participatory planning involving all stakeholders, has been presented in several studies over the past decades [7–9]. The importance of local community involvement in planning and strategy setting are determining factors [10] and can lead the community to support STD [7].

4.2.3 Local Government Management of Tourism (LGMT)

Local authorities play a central role in STD as they assume essential functions, prepare and implement tourism development plans, and apply values and standards for tourism development according to sustainability prerequisites [11]. Effective management will allow an improvement in the economic, social, cultural, and environmental level of a region, which is why local government plays a leading role, being able to avoid many of the problems related to carrying capacity, one of the most significant issues linked to sustainability in destinations. Assante et al. [12] empirically confirmed the positive association between LGMT and perceived environmental impacts of tourism, arguing that when the local government manages the destination efficiently, residents tend to be more receptive to tourism impacts. On the other hand, a relationship between LGMT and residents' support for STD can also be expected. Assante et al. [12] state that government management and stakeholder cooperation should agree on managing future tourism developments. This study concluded that residents have a more positive attitude toward STD when management is done efficiently.

4.2.4 *Perceived Risk (Associated with COVID-19)*

Tourism is a very vulnerable activity sector since its activity varies according to the changes in external factors [13], and, for this reason, whenever some crisis is experienced, this is one of the activities that feels the impact the most [14]. From the theoretical point of view, this phenomenon can be analyzed bearing in mind the changes that occur in demand, where studies are carried out linked to crisis management and the perception of risk (individual) focused on the vision of tourists [15]. Much of the body of theory focuses on the tourists' perspective, concentrating more on visitors than the receiving communities. Hence, it is essential to carry out studies that address the local community's perceptions [15] since it is only with the contribution of this group that it is possible to create inclusive management plans that address STD principles. The number of studies exposing host population perceptions of tourism activities during or after a pandemic has been growing [16]. However, it is still understated [17].

4.2.5 *Other Relevant Variables Used in Studies on Residents' Perceptions*

Community Attachment: According to the literature, community attachment is related to the personal feelings established between an individual and their environment [18]. It is a sound concept that materializes the connection between people and their community, encompassing several components whose core elements are associated with: emotion, affection, meaning, the feeling of togetherness, and value relative to the community [19, 20]. The level of community attachment is fundamental in residents' influence, perception, and attitudes toward tourism development in their community [21]. The literature confirms the connection between community attachment, perceptions of tourism impacts, and residents' support for STD, using tourism impacts as a mediating variable between community attachment and support [7, 10]. The results of these studies, depending on various factors (such as life cycle of destinations, e.g.) show different results.

Tourism Impacts: As tourism demand increases in a territory, the impacts on the local community become more evident [22], so it is crucial to investigate the perceived benefits of tourism and the costs associated with tourism [7, 8, 19]. The perception of tourism impacts (economic, social, cultural, and environmental), both negative and positive, affects the support of residents to STD [23].

Economic Dependence: This variable assesses the level of economic dependence of the local community on the tourism sector [24]. According to Chen and Chen [25], the economic dependence variable has been used to gain insight into residents' involvement in the tourism sector and whether their income depends on this sector [26]. This is a crucial variable for understanding residents' perceptions of tourism

impacts and their support for STD, as residents' views may vary according to their greater or lesser economic dependence on tourism [27].

4.3 Methodology

This study is based on a quantitative approach in the form of a questionnaire applied to a sample of residents of the historic town of Lamego, Portugal. Due to cost and time constraints, the sample for the study was based on the convenience sampling technique. Only Lamego residents who had lived in the town for at least one year were selected for the survey. The questionnaire was filled out in an online format between April and August 2021. After eliminating the incomplete questionnaires, 250 valid questionnaires were obtained.

The applied questionnaire addresses the following aspects: community involvement, community attachment, perceived benefits and costs of tourism, economic dependence, LGMT, perceived risk, and support for STD. The scales used to measure the concepts were taken from the relevant literature with adaptations for the context. A five-point Likert scale was used with values ranging from "1" (strongly disagree) to "5" (strongly agree). The operationalization of the constructs can be seen in Table 4.1.

Statistical analysis was performed using IBM Statistical Package for the Social Sciences (SPSS), version 26 for Windows. Descriptive measures were used to characterize the variables under study: minimum, maximum, mean, and standard deviation (for quantitative variables) and absolute (n) and relative (%) frequencies for categorical variables. The internal consistency of the scales was assessed through Cronbach's Alpha.

Table 4.1 Concepts' operationalization

Concept/Definition	Scale proposed by
Community involvement (CI)	[7]. It is composed of 5 items
Community attachment (CA)	[7]. It is composed of 11 items
Perceived benefits (PB)	[28]. It is composed of 12 items: positive impacts (one of the items was divided into 2) = 13 items
Perceived costs (PC)	[28]. It is composed of 8 items: negative impacts
Economic dependence (ED)	[29]. It is composed of 4 items
Local government management of tourism (LGMT)	[12]. It is composed of 3 items
Support for sustainable tourism development (STD)	[7]. It is composed of 5 items
Perceived risk (PR)	[15]. It is composed of 4 items

Source Own elaboration

To identify the groups with similarity/dissimilarity regarding the variables “Community involvement” and “Local government management of tourism,” cluster analysis was used. The grouping of individuals was initiated with hierarchical cluster analysis with the nearest neighbor method using the squared Euclidean distance as a measure of dissimilarity between subjects. Subsequently, the non-hierarchical k-means procedure was used to classify each subject in the identified clusters [30]. For the comparison of clusters, ANOVA was used to assess the significance of differences regarding continuous variables, followed by Tukey HSD multiple comparison tests. The association between the cluster and categorical variables was assessed using the Chi-square test of independence. Standardized adjusted residuals were used to identify cells with higher than expected (> 1.96) and lower than expected (< -1.96) frequency, with a 5% significance level [31]. A 5% significance level was considered, i.e., differences and associations were considered statistically significant when the significance value was less than 0.05 ($p < 0.05$).

4.4 Results

In this section, the results of the study are presented. First, the profile of the respondents is shown, followed by the results of the cluster analysis.

4.4.1 Respondents Profile

Table 4.2 summarizes the descriptive statistics of the study participants.

The sample is composed of 250 residents in the town of Lamego for at least one year, aged between 18 and 68 years (Mean = 38.3, SD = 14.9). The majority is female (63.6%) and has Higher Education (62.4%). The majority are employees (47.6%), students (32.0%), and self-employed (14.0%). With regard to the household, it is composed, on average, of 3.2 elements—24.0% have a family member involved in the tourism sector. Of the 250 respondents, 18 (7.2%) belong to households with net monthly income up to 500 Euros, 65 (26.0%) from 501 to 1000 Euros, 56 (22.4%) from 1001 to 1500 Euros, 58 (23.2%) from 1501 to 2000 Euros and 53 (21.2%) with more than 2000 Euros. On average, they have lived in the municipality of Lamego for 27.7 years (SD = 18.7).

4.4.2 Cluster Analysis

Cluster analysis was performed with the variables “Community Involvement” and “Local government management of tourism” (Table 4.3). The grouping of individuals was initiated with hierarchical cluster analysis with the method of the smallest

Table 4.2 General characteristics of survey respondents

Variable	<i>N</i> (%)
Gender	Female (159; 63.6%); Male (91; 36.4%)
Age (years)	Min = 18, Max = 68, Mean = 38.3, Standard deviation (SD) = 14.9
Education	Middle school or under (8; 3.2%); Secondary school (86; 34.4%); University degree (156; 62.4%)
Employment status	Employee (119; 47.6%); Employee–self-employed (35; 14.0%); Domestic worker (6; 2.4%); Student (80; 32.0%); Retired (10; 4.0%)
Monthly income (in Euros)	Up to 500 euros (18; 7.2%); From 501 to 1000 euros (65; 26.0%); From 1001 to 1500 euros (56; 22.4%); From 1501 to 2000 euros (58; 23.2%); More than 2000 euros (53; 21.2%)
Has a family member involved in the tourism sector	No (190; 76.0%); Yes (60; 24.0%)
Number of persons in the household	Min = 1, Max = 6, Mean = 3.2, Standard deviation (SD) = 1.0
Time in the community (years)	Min = 1, Max = 68, Mean = 27.7, Standard deviation (SD) = 18.7

Source Own elaboration

distance (nearest neighbor) using the square Euclidean distance as a measure of dissimilarity between subjects. Solutions with two or more clusters were tested. Solutions with four or more clusters were excluded due to the existence of clusters with few individuals ($n = 5$). The 3-cluster solution was chosen because it was more meaningful and interpretable. The classification of each subject in the three retained clusters was subsequently defined with the non-hierarchical k-means procedure.

Table 4.3 shows that Cluster 1 includes 91 individuals with high mean scores on community involvement (Mean = 3.88, SD = 0.63) and on perception of LGMT (Mean = 3.70, SD = 0.60). These individuals hold a very favorable perception about the effectiveness of LGMT and engage strongly with their community, hence

Table 4.3 Characterization of the three clusters regarding Community Involvement and LGMT ($N = 250$)

Variables	Cluster 1	Cluster 2	Cluster 3	ANOVA
	$n = 91$	$n = 94$	$n = 65$	
Community involvement	3.88 (0.63) ^a	2.27 (0.66) ^b	3.81 (0.63) ^a	$p < 0.001$
LGMT	3.70 (0.60) ^a	2.83 (0.71) ^b	1.79 (0.59) ^c	$p < 0.001$

Notes Results presented as mean (standard deviation); ^{a, b, c} no significant differences between clusters with common letter in each variable: $p > 0.05$ in Tukey HSD multiple comparisons tests

Source Own elaboration

they are called “Advocates.” Cluster 2 includes 94 individuals with low community involvement (Mean = 2.27, SD = 0.66) and with an intermediate perception of LGMT (Mean = 2.83, SD = 0.71): higher than individuals in cluster 3, but lower than those in cluster 1. This second cluster represents 37.6% of the total sample is termed “Disinterested.” Despite having a moderate value in the perception of the effectiveness of LGMT, they are not at all involved in the community where they live. Cluster 3, with 65 individuals, also has high community involvement (Mean = 3.81, SD = 0.63), but scores lowest on the perception of LGMT (Mean = 1.79, SD = 0.59). The third cluster, labeled “Conditional supporters,” accounts for 26% of the total sample and holds the least favorable opinion about the effectiveness of LGMT, but are also strongly involved in the community.

4.4.2.1 Cluster Profiling by Residents’ Other Residents’ Perceptions

For the comparison of clusters with the other scales used, ANOVA was used to assess the significance of differences in their: degree of community attachment; perceptions of tourism impacts (benefits and costs); degree of economic dependence on the tourism sector; level of perceived risk, and level of support for STD (Table 4.4).

The results show that individuals from cluster 2 (Disinterested) have the lowest mean scores on community attachment, perceived benefits, economic dependence, and support for STD—significantly lower mean scores than individuals from clusters 1 (Advocates) and 3 (Conditional supporters) ($p < 0.05$). Support for STD is the only variable (across scales) that differentiates clusters 1 and 3: this support is higher in cluster 1 (Mean = 3.71, SD = 0.80) than in cluster 3 (Mean = 3.38, SD = 0.78) (p

Table 4.4 Characterization of the clusters ($N = 250$)

	Advocates $n = 91$	Disinterested $n = 94$	Conditional supporters $n = 65$	P
<i>Scales—Mean (Standard deviation)</i>				
Community attachment	3.88 (0.98) ^a	3.35 (1.07) ^b	4.03 (0.81) ^a	$< 0.001^{(1)}$
Perceived benefits	4.50 (0.43) ^a	4.03 (0.78) ^b	4.38 (0.63) ^a	$< 0.001^{(1)}$
Perceived costs	2.76 (1.13)	2.62 (0.97)	2.71 (0.92)	0.641 ⁽¹⁾
Economic dependence	2.75 (1.32) ^a	1.95 (1.06) ^b	2.39 (1.36) ^a	$< 0.001^{(1)}$
Perceived risk	3.09 (1.11)	3.00 (1.04)	2.95 (1.24)	0.721 ⁽¹⁾
Support for STD	3.71 (0.80) ^a	2.54 (0.75) ^c	3.38 (0.78) ^b	$< 0.001^{(1)}$

Notes ⁽¹⁾ Significance value of ANOVA; ⁽²⁾ significance value of Chi-square test of independence; ^{a, b, c} no significant differences between clusters with common letter in each variable: $p > 0.05$ in Tukey HSD multiple comparisons tests; ⁽⁺⁾ cells with significantly higher value than the mean (standardized adjusted residuals > 1.96); ⁽⁻⁾ cells with significantly lower value than the mean (standardized adjusted residuals < 1.96)

Source Own elaboration

< 0.05). There were no significant differences between the three clusters regarding perceived costs ($p = 0.641$) or perceived risk ($p = 0.721$).

4.4.2.2 Cluster Profiling by Residents' Socio-demographic Characteristics

To profile the three-cluster solution, each cluster was cross-tabulated with socio-demographic variables including gender, age, education, employment status, monthly income, family member involved in the tourism sector, etc. (Table 4.5).

Regarding the socio-demographic variables, cluster 3 (Conditional supporters) has a higher percentage of men (49.2%), individuals with higher education (75.4%), employed (76.9%), individuals with higher incomes (more than 2000 Euros: 33.8%), live longer in the municipality (Mean = 34.75, SD = 16.57), and are older (Mean = 44.43, SD = 11.45). In cluster 2 (Disinterested) women predominate (69.1%), it has a higher percentage of individuals with primary/secondary education (45.7%), of students (43.6%), with lower incomes (43.6% up to 1000 Euros), and who do not have family members in the tourism sector (84.0%). Individuals in this cluster are younger (Mean = 33.09, SD = 14.12) and have lived in the municipality for less time (Mean = 22.95, SD = 16.84). In cluster 1 (Advocates) women also predominate (67.0%—similar percentage to cluster 2, but higher than in cluster 3). In general, this cluster is in an intermediate position between clusters 2 and 3 regarding the percentage of individuals with higher education (61.5%), employed (61.5%) and students (31.9%), low (33.0% up to 1000 Euros) and high (25.3% above 2000 Euros) incomes, average age (Mean = 39.25, SD = 16.10) and time living in the municipality (Mean = 27.60, SD = 20.36). Cluster 1 differs from the other two clusters by having a higher percentage of individuals with family members in the tourism sector (33.0%).

4.5 Discussion

The findings suggest the existence of three resident groups: Advocates (36.4%; $n = 91$), Disinterested (37.6%; $n = 94$), and Conditional supporters (26%; $n = 65$). Given that, as it is known, no other segmentation studies have been done to segment residents based on these two criteria (community involvement and LGMT), the results of the present study can only be compared to segmentation studies that have been conducted in the context of tourism development and that use other bases of segmentation: for example, residents' place image [32]; or tourism impacts [33, 34].

Firstly, similar to the study of Jani [34], in the present study, the majority of respondents fall into a cluster (Disinterested— $n = 94$) that has less positive perceptions instead of more positive ones (Advocates and Conditional supporters).

Secondly, the Advocate cluster corresponds to residents who tend to have favorable views regarding the benefits provided by tourism, tend to be more economically

Table 4.5 Socio-demographic characterization of the clusters ($N = 250$)

	Advocates $n = 91$	Disinterested $n = 94$	Conditional supporters $n = 65$	p
Gender				
Female	61 (67.0%)	65 (69.1%)	33 (50.8%) ⁽⁻⁾	0.042 ⁽²⁾
Male	30 (33.0%)	29 (30.9%)	32 (49.2%) ⁽⁺⁾	
Age (years)				
Mean (SD)	39.25 (16.10) ^a	33.09 (14.12) ^b	44.43 (11.45) ^a	< 0.001 ⁽¹⁾
Education				
Middle school or under/ Secondary school	35 (38.5%)	43 (45.7%) ⁽⁺⁾	16 (24.6%) ⁽⁻⁾	0.025 ⁽²⁾
University degree	56 (61.5%)	51 (54.3%) ⁽⁻⁾	49 (75.4%) ⁽⁺⁾	
Employment status				
Employee	56 (61.5%)	48 (51.1%) ⁽⁻⁾	50 (76.9%) ⁽⁺⁾	0.007 ⁽²⁾
Student	29 (31.9%)	41 (43.6%) ⁽⁺⁾	10 (15.4%) ⁽⁻⁾	
Domestic worker + Retired	6 (6.6%)	5 (5.3%)	5 (7.7%)	
Monthly income (in Euros)				
Up to 500 euros	7 (7.7%)	10 (10.6%)	1 (1.5%) ⁽⁻⁾	0.003 ⁽²⁾
From 501 to 1000 euros	23 (25.3%)	31 (33.0%) ⁽⁺⁾	11 (16.9%) ⁽⁻⁾	
From 1001 to 1500 euros	22 (24.2%)	21 (22.3%)	13 (20.0%)	
From 1501 to 2000 euros	16 (17.6%)	24 (25.5%)	18 (27.7%)	
More than 2000 euros	23 (25.3%)	8 (8.5%) ⁽⁻⁾	22 (33.8%) ⁽⁺⁾	
Has a family member involved in the tourism sector				
No	61 (67.0%) ⁽⁻⁾	79 (84.0%) ⁽⁺⁾	50 (76.9%)	0.025 ⁽²⁾
Yes	30 (33.0%) ⁽⁺⁾	15 (16.0%) ⁽⁻⁾	15 (23.1%)	
Number of persons in the household				
Mean (SD)	3.24 (0.90)	3.16 (1.05)	3.22 (1.08)	0.876 ⁽¹⁾
Time in the community (years)				
Mean (SD)	27.60 (20.36) ^b	22.95 (16.84) ^b	34.75 (16.57) ^a	< 0.001 ⁽¹⁾

Notes ⁽¹⁾ significance value of ANOVA; ⁽²⁾ significance value of Chi-square test of independence; a, b, c no significant differences between clusters with common letter in each variable: $p > 0.05$ in Tukey HSD multiple comparisons tests; ⁽⁺⁾ cells with significantly higher value than the mean (standardized adjusted residuals > 1.96); ⁽⁻⁾ cells with significantly lower value than the mean (standardized adjusted residuals < 1.96)

Source Own elaboration

dependent on the sector, and are more supportive of the STD. These characteristics have been previously reported in other studies, even though different labels or basis for segmentation has been used [33, 35]. Both Advocates and Conditional supporters show high involvement with the community; however, they differ in the degree of perception regarding the perception of the effectiveness of the management of tourism activities by the local government. Conditional supporters tend to be critical of the management of local authorities, something that may have to do with their party position. It is worthy to underline that the Conditional supporters constitute the smallest group. Even though sceptics concerning the effectiveness of LGMT, they show a high position on community involvement.

Thirdly, another key finding of this study is that the Advocates and the Conditional supporters exhibit strong support for STD, whereas the Disinterested do not evidence this support. This follows the results of past research [32, 35], which also noted that residents with more favorable perceptions tend to support more STD. As in the study of Vareiro et al. [35], the emergent nature of this low-density town can justify these positive opinions.

Fourth, the Disinterested cluster shared similar characteristics to those in other studies regarding the socio-demographic profile (e.g., the 'Indifferent' cluster in the study of [33]). The fact that they are the ones who present the lowest scores regarding community attachment, perception of benefits, economic dependence, and support for STD is something new in relation to other studies; however, it is an expected result, given the profile of this group of residents.

Finally, unlike previous studies (e.g., [34]), the use of the socio-demographic variables to describe the different clusters of residents proved to be very useful in the cluster analysis, as only one of the variables (number of persons in the household) did not show statistical significance. This was not the case for all the other variables, which were shown to be important in characterizing the profile of the clusters.

4.6 Conclusions

This study investigated residents' perceptions based on a cluster analysis that used two criteria reportedly never previously used in the literature: community involvement and LGMT. The findings suggest the existence of three resident groups (Advocates, Disinterested, and Conditional supporters), providing empirical evidence that community involvement and LGMT can serve as meaningful criteria for segmenting the local population of a tourist destination. To our knowledge, no studies have used these two criteria to segment residents in tourist destinations. In this context, the present study extends previous research as it reveals that these are relevant criteria for conducting a cluster analysis that provides a basis for an approach to planning and managing tourism activity focused on residents and their perceptions. In this context, the results of this study confirm the critical role community involvement and LGMT play in formulating residents' perceptions, especially their support for

STD. Furthermore, to our knowledge, previous studies have never addressed the variable perceived risk to characterize clusters of residents' perceptions. This constitutes a significant contribution of the present study compared to previous ones.

These findings have several practical implications for local authorities, place marketers, and tourism planners. The cluster analysis exposed three clusters of residents (based on the residents' perceptions of the effectiveness of the management of the tourist activity of the local government and residents' involvement in the community) with distinct views, which could provide a basis for a more targeted approach by the local government in planning and promoting this tourism destination as a whole. The knowledge of the segments allows the elaboration of a Strategic Communication Plan that meets the different audiences. In this study, an "Advocates" cluster also allows for elaborating a communication strategy based on advocacy marketing.

This study has some limitations that should be mentioned. The study was conducted on a single Portuguese tourist destination, namely Lamego; consequently, caution should be exercised in generalizing the results to other destinations. Also, the sample type (convenience) may have some under-representation of resident groups with specific characteristics. The fact that its application took place in the last phase of the restrictions imposed by the government due to the pandemic may have conditioned residents' perceptions of the phenomenon under study. In the future, it would be essential to develop longitudinal studies over at least ten years to monitor residents' support for STD in the town. Constant changes in the national and international conjuncture may lead to abrupt changes in residents' perception and support for STD. Applying the same methodological approach to different stakeholder groups, such as visitors, would also be necessary for understanding other stakeholders' support for STD.

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Chapter 5

Data Science in Supporting Hotel Management: Application of Predictive Models to Booking.com Guest Evaluations



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Abstract Data science is a multidisciplinary area that gathers several branches, such as statistics, databases, and computer science and whose importance has become more substantial over the last few years. Using several techniques and algorithms from machine learning allows us to understand how certain variables are related, as well as to visualize data and make predictions. This paper aims to use data science as a strategic instrument for the hospitality industry by proposing a model that can help to predict which characteristics will be more valued by guests. By better understanding which features guests value most when evaluating a stay at a hotel, it will be easier for hotel managers to make informed decisions about which service operations management strategies should be used. It can also be helpful in terms of investment decisions, as it can indicate which aspects will be most important to value in a hotel. In this research, it was possible to conclude that guests' ratings are related primarily to the commodities available at the hotels, followed by cleanliness, staff, location, price-quality relation, and comfort.

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5.1 Introduction

Data science is an area that brings together several classical disciplines, such as statistics, mathematics, databases, and computational sciences. The main objective is to extract relevant information from a data set using machine learning techniques and algorithms. For this reason, it has gained greater importance over the last few years, as it can be a valuable tool for different sectors. The hospitality industry is no exception.

Data science can be beneficial in characterizing the offer of hotels, namely their characteristics, services, and equipment. Additionally, it enables higher knowledge about customer preferences and their appreciation for the services. If used in an objective and targeted manner, this tool allows a better understanding of the offer through quantitative and qualitative analyses and supports hotel managers in decision-making and in elaborating their business strategy.

This article seeks to cross data science with the hospitality sector by demonstrating this area's usefulness and how it can constitute an essential strategic tool for hotel planning and management.

This study is based on a set of variables extracted from the Booking.com platform relating to the evaluation that consumers provide of hotels at the end of their stay, both at a general level and in specific categories.

Using statistical analysis and machine learning algorithms, we seek to find a relationship between these variables and understand how they influence the overall rating given by customers for their stay. In this way, the main objective is to propose a model that can predict the main characteristics of the hotel service that most influence the classification assigned on Booking.com.

This analysis seeks to help hotel managers decide, allowing them to understand better what consumers value most. In this context, hotel managers can identify the services that need more attention. A better knowledge of the services most valued by customers will contribute to more informed decision-making by hotel managers.

5.2 Theoretical Background

Nowadays, computational sciences and technology are growing faster and faster, and, in this way, more and more data is generated and stored, giving rise to the concept of Big Data [3]. In this context, data science emerges, a multidisciplinary and comprehensive area that combines classic disciplines such as statistics, mathematics, databases, and computational sciences [9]. This uses various techniques and algorithms, namely machine learning algorithms, to extract information from a data set, thus increasing its usefulness. Thus, in recent years, data science has aroused more interest among professionals from various areas and societies, aiming to support decision-making.

This area, therefore, has several objectives, such as finding relationships between the variables under analysis, understanding the behavior of the data, visualizing them in different ways and making predictions. Data science consists of several stages, namely the collection and storage of data, their preparation and exploration and, when necessary, their transformation. Then, when the data set already has all the required conditions, several learning algorithms are applied to make predictions and to draw conclusions about the characteristics or distribution of the data [9].

This forecasting tool is applied in several areas, for example, in the business area to predict the sales values of a specific product or in tourism and hospitality to predict revenue or occupancy rates.

5.2.1 Some Examples of the Applicability of Data Science in Hospitality

Although there needs to be more research based on the same data set from Booking.com, some studies with similar approaches were identified, mainly based on the analysis of customers' appreciation of hotel and restaurant services through online platforms.

Jiang et al. [2] analyzed the reviews of English-speaking tourists on TripAdvisor about hotels in mainland China. These authors sought to compare the brand image of different types of hotels and different classifications (stars), concluding that this varies according to the specific characteristics of the hotel. Additionally, they found that a hotel with a certain number of stars is not always associated with the same type of review, so there should be a distinction between the ratings.

Pacheco [6] studied the reviews of Portuguese hotels in four regions (Lisbon, Algarve, Madeira, and Porto & Norte), grouped into three categories (two/three stars, four stars, and five stars). This author also took data from TripAdvisor, one of the largest online travel review platforms. In addition to testing the existence of significant differences between regions and between categories, Pacheco also uses various statistical tests and regression analysis to explore the relationship between overall satisfaction and six specific attributes—location, quality of sleep, rooms, service, cost–benefit, and cleanliness. He concluded that the rooms, service, and cost–benefit ratio indicators presented the highest correlation with overall consumer satisfaction for any region or category. On the other hand, the variables cleanliness and location are significant only in some regions and segments. This author also emphasizes that the conclusions of this study can help hotel managers allocate resources as it determines which attributes have a more significant impact on overall customer satisfaction.

In another study, Pacheco [7] carried out a study for Michelin-starred restaurants located in Portugal and Spain, in which he intended to explore how four specific variables (food, service, value for money, and atmosphere) influenced the overall satisfaction of consumers. These data were also taken from TripAdvisor. In this

analysis, several statistical tests and regression analyses were also used, which led to the conclusion that the food and service indicators were the ones that presented the most significant correlation with general satisfaction. Pacheco highlights the importance of this study for the catering sector, as it allows for identifying the variables that most contribute to overall satisfaction and thus improving or investing in attributes to achieve a competitive advantage. These two studies emphasize the importance of electronic word-of-mouth (eWOM), which has gained greater importance over time due to the emergence of new technologies and tools [7]. The author highlights online reviews, ratings, and consumer opinions as examples of this phenomenon.

Litvin et al. [4] defined eWOM as all informal communications addressed to consumers through Internet-based technology related to the use or characteristics of specific goods and services or their sellers. This author highlights the influence of eWOM in the tourism and hospitality sector since customer reviews are a valuable source of information for new tourists looking for an independent assessment. Therefore, this phenomenon can benefit managers since the reviews and ratings make it possible to increase profitability [6].

The importance of reviews is also highlighted in the work of Lu and Stepchenkova [5], which concludes that most people when planning their trip, consider online reviews, given that they contain more up-to-date, detailed, and reliable information. This context reinforces the pertinence of data science in analyzing data produced daily in the hospitality sector.

This study constitutes an essential tool for the tourism and hospitality sector, namely for hotel managers. By using data science applied to Booking.com data, it is possible to understand better consumers' preferences and motivations by verifying which hotel characteristics contribute to their satisfaction, that is, to the attribution of a higher appreciation.

5.3 Method and Data Collection

All data analysis was performed using the Python programming language, using specific libraries such as *pandas*, *seaborn*, *matplotlib*, *scikit-learn*, and *pycaret* for data analysis and manipulation, visualization, and training of predictive models.

5.3.1 Data Collection

To respond to the objective of this work, it was necessary to collect data on the classification that customers attribute to a hotel at the end of their stay. For this purpose, the online platform Booking.com was used to collect data about Portuguese hotels. Booking.com is one of the leading hotel search and reservation engines, which contains information on the classification of consumers, in a range of 1 to 10, for each hotel. In addition to a general rating, there is information regarding more specific

categories, such as staff, facilities, cleanliness, comfort, location, value for money, and free Wi-Fi.

This information was collected manually for all hotels, resulting in a database with 1426 hotels and 8 variables referring to consumer satisfaction: general, cleanliness, location, staff, comfort, value for money, facilities, and free Wi-Fi. Of these, it was decided to exclude the free Wi-Fi variable from the predictive model since this characteristic is also evaluated in facilities. This variable includes particular and comprehensive features, including free Wi-Fi, parking, swimming pools, fitness centers, or even more specific components such as coffee/tea in the room, and bathrobes, among many others.

5.3.2 Model Selection and Evaluation

To predict the overall rating from Booking.com specific ratings, different regression models available in the Python *pycaret* library were tested (see list in Fig. 5.1). For this, the original data set was divided into a training set and a test set in the proportion of 70–30%, respectively, performing a simple random sampling.

With the training set and the tenfold cross-validation strategy, the algorithm with the best performance was analyzed. The cross-validation method was also used to adjust existing hyperparameters in some algorithms, such as ridge regression or gradient boosting regression. The performance of the chosen model is then evaluated on the test set. In the various moments when this was necessary, different measures were used to evaluate performance, such as the mean absolute error (MAE), the mean squared error (MSE), and the root mean squared error (RMSE), focusing our attention more on this latter by obtaining an error measure on the same scale as the

Model	MAE	MSE	RMSE	R2
Linear Regression	0.0767	0.0106	0.1021	0.9711
Ridge Regression	0.0767	0.0106	0.1021	0.9711
Least Angle Regression	0.0767	0.0106	0.1021	0.9711
Bayesian Ridge	0.0767	0.0106	0.1021	0.9711
Huber Regressor	0.0766	0.0106	0.1022	0.9710
Extra Trees Regressor	0.0843	0.0128	0.1128	0.9648
Gradient Boosting Regressor	0.0828	0.0130	0.1133	0.9647
Random Forest Regressor	0.0850	0.0132	0.1146	0.9637

Fig. 5.1 Results of applying tenfold cross-validation to the training set with 8 regression algorithms

Fig. 5.2 Performance of the linear regression model on the test set

Model	MAE	MSE	RMSE	R2
Linear Regression	0.0812	0.0132	0.1148	0.9647

variable being predicted. The R-squared (R2) was also used to analyze the quality of the fit between the dependent variable and the predictive variables.

5.4 Results

5.4.1 Predictive Model Applied to Booking.com Ratings

This model intends to predict the value of the general classification attributed by consumers, using indicators related to evaluating six specific categories: staff, facilities, cleanliness, comfort, value for money, and location. Figure 5.1 shows the results obtained with tenfold cross-validation in 8 regression algorithms. The results are very similar, with a slight performance loss in the case of more complex algorithms such as Extra Trees, Gradient Boosting, or Random Forest. The value of R2 close to 1 shows a solid fit between the general classification (about 97% of the variation in the general classification is explained by the regression model) and the specific classifications. The RMSE value is relatively low, indicating an error of about 0.1 on ratings ranging from 0 to 10 (actually, and in most cases, between 6 and 10). The linear regression model was chosen as the final model, obtaining a performance evaluation on the test set shown in Fig. 5.2. The RMSE value is slightly higher (less than 0.12), which indicates that the training process did not suffer from overfitting.

Another point of interest was understanding which variables (specific classifications) contribute most to predicting the general classification. For this, the feature importance plot was used, from which the information in Fig. 5.3 was extracted.

Through the analysis of Fig. 5.3, the facilities of the hotels stand out as the specific feature that weighs most in the general appreciation given by customers. In this context, facilities include all products or services found in the hotel. In this way, one can see the importance of structuring a hotel product that is coherent and suitable for the different market segments. Bearing in mind that hotels with different categories (stars) have different levels of facilities, differentiation may arise through how hotel managers exceed expectations regarding the provision of these facilities. On the other hand, it is also important to note that the higher the legal rating (stars), the greater and more comprehensive the range of products and services offered.

Following are the variables cleanliness and staff, with lower importance than the first variable. The fact that these two variables have a significant weight in the general classification is consistent with the conclusions of the study by Choi and Chu [1], which showed that these indicators are included in the three factors with the most significant influence on consumer satisfaction. While previously discussed facilities

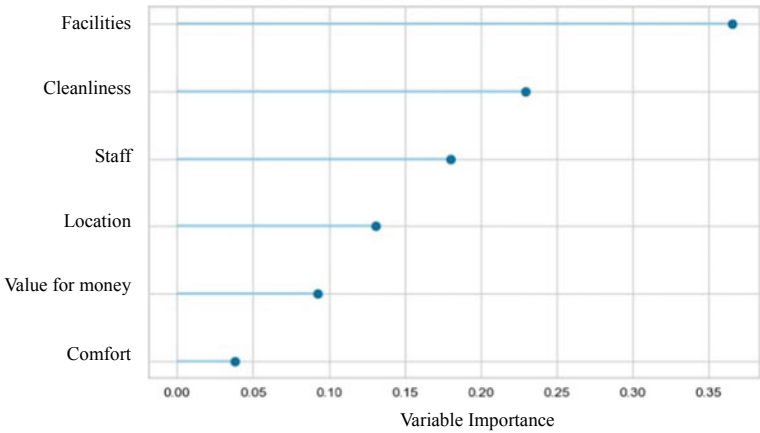


Fig. 5.3 Feature importance plot for linear regression model

may be more directly associated with hotels’ budgets (higher budgets mean more investment and vice versa), hotel managers may more easily control cleanliness and staff. These two features can be worked on and improved internally, for example, by closely monitoring the service and identifying possible actions to improve these services. The fact that, through the predictive model, it was possible to assess that cleanliness and staff are among the three main features that influence the general classification of Booking.com reinforces the importance of hotel managers paying more attention to these specific services.

The location of hotels is of critical importance, and it is usually related to accessibility to points of interest, transport convenience, the surrounding environment, and market conditions [10]. As stated by Yang and Mao [10], the overall effect of location advantage is more substantial for urban hotels. However, in our study, we worked with hotels nationwide, including urban, coastal, mountain, and rural areas. Therefore, in the predictive model analysis, the location is not one of the most critical factors for the overall classification. This result may be related to the fact that there is a great diversity on offer, and the customer can choose the hotel according to the exact or approximate location they want.

Next comes value for money, which has to do with the perception of the value of the service the customer receives compared to the price paid. Here, the fact that it is one of the less important features may be related to the high competitiveness of the hotel market, which, through online platforms such as Booking.com, presents frequent fluctuations in prices, influenced by demand and occupancy rates. Considering that customers can choose the best deal on the online market, it seems logical that other features such as facilities, cleanliness, and staff have a greater weight in the final evaluation.

Finally, comfort is the feature with less influence on global evaluation. This conclusion was not expected, given that Sthapit [8] highlighted this factor as one of the determinants of guest satisfaction. However, considering that comfort is usually

related to room temperature, light, and mattress, among other characteristics, hotel managers pay a lot of attention to these aspects. As such, with the basic standards of comfort commonly accepted and implemented in the hotel industry, guests' attention is directed toward other features, as we have already mentioned.

5.5 Conclusion

This article sought to combine data science with hospitality management through its application in the Portuguese hotel industry. An attempt was made to build a predictive model for the general rating variable, using the remaining variables taken from Booking.com for specific categories as independent variables since it was found that these ratings were assigned independently. It was noted that facilities, cleanliness, and staff were the most important factors when consumers attributed their general appreciation to the hotel. This means that investment in new products and services is significant in valuing hotels and guest experience. On the other hand, it reinforces the need to pay great attention to human resources and service operations, namely cleaning.

As future work, since this study was carried out only for the hotel's typology and for the territory of Portugal, this approach could be expanded to different typologies or regions to draw different conclusions.

This study is a decision support for hotel managers as it informs them of the features customers value most during their stay. Analyzing the data set made it possible to understand which factors most influenced consumers in assigning online ratings. Based on these conclusions, the offer can be adapted to the needs and preferences of consumers to increase occupancy rates and profitability.

In this way, the work highlights the importance of data science in tourism and hospitality since data analysis can be a valuable strategic tool with a high potential to draw different conclusions and help in decision-making.

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Chapter 6

Organizational Commitment: The Role of Organizational Happiness and Quiet Quitting



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Abstract Purpose: This study endeavors to examine the correlation between Organizational Commitment and Organizational Happiness in the changing labor market, with a specific emphasis on Quiet Quitting. Its principal objective is to ascertain whether higher employee happiness levels result in heightened commitment, thereby reducing the prevalence of Quiet Quitting occurrences. **Methodology:** Employing a multi-method quantitative approach, the study will use a structured questionnaire with closed-end questions on a five-point Likert scale. Organizational Commitment will be measured using the Allen and Meyer (1990) scale, Organizational Happiness with Campaniço's (Campaniço, E. N. (2012). *Felicidade organizacional-proposta de escala de medida para as organizações em Portugal* (Master's thesis). <https://1library.org/document/qvv6d2lq-felicidade-organizacional-proposta-escala-medida-para-organizacoes-portugal.html>) scale, and Quiet Quitting using the Anand et al. (Anand et al. in *Int. J. Organ. Anal.*, 2023) scale. Statistical analyses will be performed to interpret the data. **Managerial Implications:** This study's findings can offer valuable insights to organizations, helping them to create a positive work environment that enhances employee well-being and mitigates the risk of Quiet Quitting. Strategies to promote employee happiness and commitment could lead to increased performance, reduced absenteeism, presenteeism, and turnover rates, and improved talent attraction and retention. **Social Implications:** The study's results have broader societal implications, particularly in the post-pandemic labor market. Addressing Quiet Quitting and promoting workplace

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happiness can contribute to improved work–life balance and overall job satisfaction, positively impacting individuals’ mental health and well-being. *Originality:* This research addresses a gap in the existing literature by exploring the relationship between Organizational Commitment, Organizational Happiness, and Quiet Quitting within the changing labor market. Its multi-method approach and focus on contemporary workforce dynamics contribute to its originality and potential to offer fresh insights for organizations and researchers.

6.1 Introduction

Working-age adults, generally, spend a substantial portion of their waking hours in the workplace. According to recent data, from the OECD database, people in the USA spend the equivalent of one-third of their adult life, on their work [36]. This significant amount of time underscores the importance of cultivating positive, healthier, and more fulfilling work environments. Employers prioritizing their employees’ happiness and job satisfaction are more likely to attract and retain talented personnel, ensuring a stable and efficient workforce. On the contrary, workplaces that neglect these factors may face challenges such as high rates of absenteeism, presenteeism, and staff turnover, as well as low morale and decreased efficiency [46].

The COVID-19 pandemic has had a significant impact on the labor market, transforming the way people work. There were many changes in the labor market, including after the pandemic acute stage. Those changes include remote work, several digital transformations, automation (such as Artificial Intelligence solutions) and customer behaviours. These disruptions led to remote work arrangements, shifts in job responsibilities, and increased stress and burnout, making workers reevaluate their priorities and career goals in the wake of the pandemic. Additionally, the pandemic has highlighted existing workplace issues such as low pay, inadequate benefits, and limited opportunities for advancement, leading to a “new normal” in the labor market that requires both, employers and employees, to adapt to changing demands and acquire new skills to remain competitive [8, 11, 29, 31, 39].

Organizational Commitment, Organizational Happiness, and Quiet Quitting are all related concepts within the context of employee behavior and motivation. Organizational Commitment refers to the degree of emotional connection an employee experiences toward their organization. It signifies the extent to which an employee demonstrates loyalty, identification, and involvement with their organization [15]. In the current reality, characterized by a high personnel rotational flow, commitment is considered one of the most important attitudes for achieving common objectives [14] and a key factor in the relationship between individuals and organizations [41]. Organizational Happiness, an emerging “umbrella” construct that unites several disciplines, refers to the overall well-being and satisfaction of employees within an organization. It includes factors such as job satisfaction, work–life balance, a positive work environment, state engagement, task enjoyment, emotion at work, intrinsic motivation, and others [18, 20, 40]. Quiet Quitting entails employees disengaging

from their work and organization without officially resigning. It involves intentionally restricting work activities within the confines of their job description and refraining from exceeding established expectations. This can manifest as decreased effort, increased sick days, and a lack of willingness to take on additional tasks while maintaining their current employment status, ultimately resulting in a diminished commitment to their job. The main reasons for it, especially among younger generations, are loss of purpose, poor extrinsic motivation, unrealistic demands, burnout, lack of fair recognition and grudges against managers, feelings of injustice, and a need for a healthier work–life balance [19, 43].

While there is an evident connection between these concepts, further exploration is needed to fully understand the depth of their relationship. In light of this, the following research question emerges: “Are employees, who are happy with their job and work environment, more inclined to demonstrate commitment to their organization and less likely to quietly quit?” This study aims to understand the relationship between these variables and identify workplace improvement areas. The GAP covered by this study can provide valuable insights into workplace dynamics and effective ways to promote employees’ happiness, by exploring workforce commitment, thus bucking the Quiet Quitting trend.

6.2 Literature Review

6.2.1 *Organizational Commitment*

The concept of Organizational Commitment (OC) has emerged during the 1970s and 1980s as a significant factor in the relationship between individuals and organizations [41]. Various definitions of OC can be found in the literature, but most of them emphasize this connection (Sivaramakrishnan et al. 2008). Among these definitions, the most relevant one pertains to the extent of employees’ involvement in the organization and their identification with it [35]. OC often reflects individuals’ involvement, attachment, engagement, devotion, and identification with an organization [10, 15]. From a global perspective, within any organization, the commitment of employees serves as a primary indicator of superior performance, increased productivity, and improved profitability [25]. Employee participation and identification with the organization demonstrated through acceptance and belief in its goals and values are critical for the organization’s success. Committed employees possess a willingness to exert significant effort for the organization’s benefit, driven by a sense of belonging [39]. As stated by Metin and Marangoz [32], organizations have recognized the importance of increasing and maintaining employees’ motivation and commitment to achieve high performance and ensure the continuity of human resources. Consequently, many organizations face the challenge of fostering loyalty and commitment among their employees to achieve economic and cultural success [14]. OC has many benefits, such as: increased productivity and profitability, improved individual effectiveness

and efficiency, enhancements in the work environment, promotion of teamwork, efficient conflict resolution, and reduced rates of absenteeism and tardiness. According to Allen and Shanock [2], committed employees often demonstrate greater loyalty, leading to better job performance, work ethics, intelligence sharing, and willingness to spread positive word-of-mouth about the company among other factors. Fisher [20] also stated that OC is one of the most commonly measured constructs related to happiness at work.

Meyer and Allen [33] established three distinct dimensions of OC: affective commitment, continuance commitment, and normative commitment. Affective commitment specifically pertains to the emotional bond between an employee and the organization, representing the emotional attachment that binds the individual to the organization [38]. This type of commitment develops when employees' experiences within the organization meet their expectations and fulfill their basic needs. Employees feel valued and treated like family, considering the organization an integral part of their lives, and cultivating feelings of belonging, affection, and joy [14]. According to Fisher [20], affective commitment can be regarded as an integral component of work happiness, since it closely aligns with happiness, as it signifies an emotional bond with the organization. Continuance commitment revolves around the costs and benefits associated with leaving the job and exiting the organization [38]. It can be defined as the difficulty employees face in altering their relationship with the organization due to limited alternative options available in the market or the associated costs of change, such as the loss of continuity [14]. Normative commitment entails a sense of obligation to remain in the organization [38], driven by moral duties of reciprocity based on the employee's attachment to the organization [7]. Imperative feelings of permanence, retribution, or moral gratitude toward the organization can arise from having received benefits, opportunities, concessions, or special advantages from the organization [14].

6.2.2 *Organizational Happiness*

The significance of experiencing happiness holds great importance for most individuals, and the pursuit of happiness is highly esteemed in most societies [16]. As a result, the interest in happiness has expanded to encompass the realm of workplace experiences [20]. Nevertheless, assessing happiness can be challenging as existing measurements tend to be one-dimensional and non-academic validated [37]. According to Fisher [20], prior research has tended to underestimate the significance of happiness at work, as it encompasses not only job satisfaction but extends beyond it. In today's labor market, characterized by increasing change and unpredictability, Organizational Happiness (OH)—as a construct encompassing different concepts such as job satisfaction, Organizational Commitment, work involvement, engagement, prosperity, vigor, flow, intrinsic motivation, or positive affect at work—has gained importance in research and organizations from all types of fields [6, 21, 28, 42]. Aspects of happiness have been conceptualized and measured at multiple

levels, encompassing discrete events, the job itself, and the organization as a whole. Evidence exists at all levels indicating that happiness has significant implications for both individuals and organizations [20]. Organizational Happiness is emerging as a multidisciplinary and transdisciplinary field, reflecting the potential new horizons of human work in the future [4]. It represents a multifaceted and strategic concept within the realm of human resource management and organizational dynamics [17] and embodies an attitude that enables each employee to maximize their performance and realize their potential when working individually or as part of a group (Pryce-Jones, 2010).

Among an organization's intangible assets, its workforce holds the most significant potential for distinctive competitive advantages [23]. Neglecting the value of human capital can lead to missed opportunities for development and diminished productivity [21]. Consequently, organizations are committed to establishing enduring relationships with their employees, striking a balance between maximizing productivity, and creating an organizational culture where individuals genuinely desire to work [45]. Consequently, it becomes imperative to implement effective approaches to understanding employees' needs, facilitated through open communication channels across all hierarchical levels within the company [26]. According to Vadkert [44], happy employees are more engaged, cooperative, innovative, and committed and are more likely to significantly impact the company's bottom line. Furthermore, happy individuals exhibit higher levels of productivity and efficiency in the workplace compared to their unhappy counterparts, as their happiness transcends the boundaries of work and home life [5]. Achor [1] also posited that happy individuals tend to achieve more successful careers, finding happiness within their workplaces.

6.2.3 *Quiet Quitting*

During the extended period of isolation, mandatory due to the COVID-19 pandemic, employees had the opportunity to reflect on their work and contemplate a fresh start once the pandemic era ended. This reflection led to the emergence of the Great Resignation, which began in the spring of 2021 when employees were called back to work, but many chose not to return [22]. Consequently, this novel phenomenon called "quiet quitting", or "silent resignation" has emerged, with quiet quitters adopting mottos such as "leaving work at work" and "working to live" instead of "living to work" [9]. While the term Quiet Quitting was coined by economist Mark Boldger in 2009, it gained popularity in 2022, a year after the start of the Great Resignation [22]. The trend attracted media attention through a TikTok video by user zkchillin, who presented the idea of "going to work, but not giving it your all", generating over three million views and half a million likes, presenting QQ as a positive way to achieve work-life balance [27]. QQ manifests in different forms, such as refusing projects outside of job descriptions, not responding to work-related communication outside of working hours, or simply leaving work on time. However, while this trend

promotes work–life balance, it may have negative repercussions, as simply doing less can lead to increasing frustration rather than genuine happiness [27]. Therefore, the term refers to the limited commitment of employees to their assigned duties and the relinquishment of any tasks not explicitly stated in their job descriptions, implying a low investment in work activities, with quiet quitters being disengaged and not inclined to “go above and beyond” their prescribed responsibilities [22]. This mindset, while helping workers avoid burnout, can jeopardize their professional careers [43].

Although QQ is not a new phenomenon, as similar concepts have existed for decades, there is limited research on this topic from the perspective of human resource management and organizational behavior [24]. One such concept is “work to rule,” which has been used by unions worldwide for centuries as a method of industrial action, involving the disruption of company operations by adhering strictly to the prescribed rules of work [30]. While “work to rule” is a collective action tactic often used during trade disputes, QQ is more personal and tied to workers’ individual desire for mental health and work–life balance. However, both concepts signal a need for employers to address and solve underlying issues by creating engaging workplaces [30]. According to Anand et al. [3], QQ typically involves a psychological departure from the work and the organization via job disengagement (e.g., lack of interest in finishing the tasks) due to the employee’s desire to prioritize their work–life balance or well-being. In this regard, it is important to note that while the pandemic has accelerated the phenomena of the Great Resignation and Quiet Quitting, these paradigm shifts are not solely a result of COVID-19 restrictions. Dissatisfaction among employees, as evidenced by high turnover and low engagement, has existed before the pandemic, which acted as a catalyst highlighting and accelerating long-standing workforce dissatisfaction that cannot be ignored [22].

QQ, in its contemporary form, resonates particularly with younger employees who have experienced significant workplace changes due to the pandemic [24]. Generational differences play a significant role, with younger workers valuing flexibility, appreciation, autonomy, and work–life balance. Organizations must be mindful of these differences and adapt their practices to attract and retain talent, pleasing a younger and more diverse workforce that demands changes in the workplace [9]. To address QQ, organizations should focus on improving their culture, prioritizing human capital, and offering benefits that support work–life balance. Strategies may include investing in knowledge sharing, retaining high performers, managing burnout, promoting fairness between managers and subordinates, and rewarding employees who “go above and beyond” [43]. By putting human capital at the core of their strategies, organizations can foster positive attitudes, behaviors, commitment, and engagement among employees [9].

6.3 Methodological Proposal

To measure the research constructs, the instrument will be designed and structured through a multi-method quantitative study involving a questionnaire and the observation of statistical analyses. The questionnaire format will have closed-end questions, following the five-point Likert Scale, ranging from 1 (strongly disagree) to 5 (strongly agree). The questionnaire will consist of the following sections: the section to measure Organizational Commitment, the section to measure Organizational Happiness, the section to measure Quiet Quitting, and the section to find out the demographics of respondents.

Allen and Meyer (1990) scale would be used to measure Organizational Commitment. This scale started from a total of fifty-one items, adapted from other scales or written by themselves, to build the final 24-item scale used in the present study [34]. The measurement of Organizational Happiness was developed based on the Organizational Happiness Measurement Scale constructed by the Happiness Works2 project. This scale was developed for the Portuguese population by Campaniço [12], whose research was further developed in the works of Campaniço and Dutschke [13] and Dutschke [17]. The 45-item scale is used annually to verify the levels of Organizational Happiness of professionals in Portugal and is suitable for the objectives of the present study. Anand et al. [3] scale would be used to measure Quiet Quitting. This scale measures individual-level work disengagement, low Organizational Commitment, and not “going above and beyond” in work. The 7-item scale development process involved item generation through literature search, review, and interviews with working executives.

6.4 Further Research and Implications

Future research in this area should explore the relationship between Organizational Commitment, Organizational Happiness, and Quiet Quitting, considering evolving labor market dynamics and the impact of the COVID-19 pandemic. A longitudinal study can offer valuable insights into the long-term effects of Organizational Happiness on employee commitment and Quiet Quitting tendencies. Additionally, qualitative research methods, like interviews and focus groups, could provide a deeper understanding of employees' perspectives on workplace happiness and commitment.

From a managerial perspective, the study highlights the importance of prioritizing employee happiness and well-being to foster a positive work environment and enhance employee commitment. Managers should focus on creating a supportive and inclusive workplace culture that values employees, promotes work–life balance, and offers career development opportunities. Addressing factors contributing to Quiet Quitting can enhance employee retention and productivity, leading to improved organizational performance.

The social implications of this research are significant. Organizations prioritizing employee well-being contribute to a society with a higher quality of life and reduced stress levels, particularly in terms of mental health. Improved work–life balance and job satisfaction positively impact overall well-being and health. Creating supportive work environments can play a crucial role in improving societal mental health and reducing absenteeism, benefiting employees and the broader community.

In conclusion, understanding the link between these constructs is vital for organizations to thrive in the changing labor landscape. By implementing strategies to enhance employee happiness and commitment, an organization can foster a highly engaged and resilient workforce. This, in turn, plays a pivotal role in contributing to a healthier and happier society. This research sets the stage for future studies and offers opportunities to create workplaces that promote employee well-being and organizational success.

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Chapter 7

Proposal for a Technological Thematic Concept for the Trays Festival Museum



Rui Miguel Ferreira Carvalho  and João Tomaz Simões 

Abstract The experience economy has challenged museums to rethink their mission, as traditional cultural institutions when confronted with new forms of tourism consumption. As tourists demand more authentic experiences, co-creation has allowed tourists to engage pragmatically with tangible and intangible heritage and museum exhibitions reframing how curation, museology-related content, and technology are present in fourth-generation museums. The Trays Festival (TF) is an internationally recognized community-based event which attracts more than six hundred thousand people every four years to the Portuguese city of Tomar. Dating back to the thirteenth century, this secular and sacred event includes the adornment of trays, houses and streets, paper flowers, bread and wheat spikes, typical elements of ancient festivals of crops. As the festival represents a fertile ground for the use of local creativity, a TF Museum could function as a way to promote sustainable development in the city fostering distinction among traditional cultural tourism destinations. The authors developed a literature review on the variables of the study and analyzed recent technological and marketing strategies for museums. As part of ongoing research, this paper has the goal to present a technological and thematic proposal for the development of a TF community-based museum in the city of Tomar, embedded in technology, creativity, and authentic tourism experiences. We believe that such a proposal could help to tackle seasonality in the destination by promoting a continuous offer around the TF.

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7.1 Introduction

Museums have undergone significant changes, especially after the COVID-19 pandemic [34] where these traditional cultural institutions provided essentially an educational role in the formation of cultural segments [27, 39]. Many of these institutions, formerly seen as the great bastions of culture [39], have improved their online presence, internet-mediated customer experiences, and cultural digitalisation [17] in the light of greater availability of online content and online consumers [30]. The very recent experience and creative economies have highlighted the importance of more authentic, differentiated, and technologically mediated experiences for museumgoers [45, 46]. In this relation, technology plays a pivotal role in the development, design, and supply of such experiences. Over the years, much of the evolution of museums [9] has arguably been influenced by several internal and external factors such as changes in public needs, the traditional functions of the museum, the technology available, local community representations, the search for authentic experiences [2, 17, 25, 35]. In the recent need for a new museum definition [20], fostering inclusivity, community participation, and sustainability, museums are no longer just pious places where one could mainly have access to important and representative tangible cultural resources, echoing the passive sentiment of museumgoers as sign collectors dear to Lash and Lurry [24] or MacCannell [28] tourists as consumers of staged authentic experiences. According to the latter, “museums have long been converted from collections of scholarly research to the public places they are today” (MacCannell [28], p. 78), offering educational services, restaurant services and shops, open to the general public besides the traditional services, such as guided tours, educational programs, and lectures [9].

The TF has been one of the most important cultural events ever organized in the city of Tomar, in the central region of Portugal motivating almost 600,000 tourists to visit this traditional cultural tourism destination every four years. As a strong link to the local community, this festival would not be possible without their hard work of several months [49], one of the reasons it does not happen every year. These traditional decorative trays used in the religious processions of Tomar have been an integral part of the cultural fabric for centuries, thereby making them an embodiment of a rich cultural heritage [33]. These cultural assets provide profound insights into the socio-cultural dynamics of the Tomar community and offer historical narratives steeped in tradition and local aesthetics [14, 41]. The festival is strongly ruled by the people, the consummation of the party is determined by their wish, and it’s also the people that select the *mordomo* (Master of Ceremony) [10]. The event lasts for two weeks in the month of July and includes two processions, the more recent called the Boys Procession (children) and the main Parade (adults) with couples from all over the cities’ region. In immaculate white dresses, contrasting with the colourful flowers of the baskets and the golden colour of bread carried on their heads in the trays [10]. Visitors, 600,000 (2019), 750,000 (2023) in just one day, totalling more than a million visitors during the event can also see the decorated streets with paper flowers, concerts, and handicrafts. The festival was inscribed, last May, on the

National Inventory of Intangible Cultural Heritage, initiating the preparation of an application for the UNESCO Intangible Heritage of Humanity List. In this context, the preservation of such valuable heritage resources is of utmost importance and a focused endeavour in this direction is the proposed TF Museum in Tomar. Based on the literature review and an analysis of recent technological and marketing strategies for museums, this paper proposes a comprehensive technological thematic concept for the Museum. The following sections elaborate on the goals, the exhibition design and layout, and suggest strategies for collection management, educational programs, marketing and promotion, and sustainability.

7.2 Technologically Mediated Tourism Experiences in Museums

As technology has invaded almost every social sphere globally, it has influenced the way we consume culture and cultural goods. Pervious to this reality, museums have been adapting their role and functions to stay relevant under the ubiquity of the internet and other technologically intermediated and curated cultural tourism experiences [39]. According to the ICOM [20], a museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets, and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection, and knowledge sharing. This new definition of the museum [20] highlights the postmodern and transmodern concerns [7] for more democratic, inclusive, representative, transversal, and sustainable roles in providing tools for the preservation and consumption of tangible and intangible cultural resources [20].

Carvalho and Duarte [9] envisage the museum's evolution under four generations. In the first generation, curiosity cabinets in the seventeenth/eighteenth centuries and large natural museums strongly connected to universities and scientific knowledge, provided cultural education, 2^o generation museums, from the end of the eighteenth until the 30 s of the twentieth century, were progressively preoccupied with industry needs and internationalization while focusing on teaching, collecting, conservation, and research; 3^o generation museums throughout the XX century has started to include contemporary science and technology providing more interactive and pragmatic experiences to visitors; and lastly 4^o generation museums are seen as science centres where the visitor represents an active and creative element defining and co-creating his cultural experience during visits [9]. Hence, fourth-generation museums have been paying more attention to how their cultural resources and cultural content have been accessed and consumed via the internet, alongside their media presence [40]. Such changes influenced the way local traditions, rituals or celebrations are transmitted, preserved, presented, and consumed by the public not to mention how

local communities representations in a largely technological intermediated scenery. Especially when we think of museums and their ever-changing nature, characteristics, and goals [9], they become repositories of shared histories and identities, reflecting collective memory, religious practices, and social transformations. The TF Museum aims to provide a platform for a journey that traverses time and space, unveiling the richness of cultural traditions and historical narratives underpinning the creation and use of trays [29]. By curating this immersive experience, the museum will foster a sense of community ownership, cultural appreciation, and historical understanding [19] characteristic of the festival [10].

7.3 Trays Festival Museum Goals

The key objectives of the TF Museum are manifold and informed by contemporary museum theory and practices [48]. Central to these is the goal of safeguarding and interpreting the heritage of the festival, coupled with an explicit aim to educate and engage local and global audiences about this unique cultural manifestation [19]. Secondly, the museum will strive to leverage state-of-the-art technologies enhancing visitor engagement, creating creative and immersive experiences, and developing narratives around trays accessible to a broad audience spectrum [37]. The incorporation of technologies like augmented reality (AR), virtual reality (VR) [11], IA, and interactive digital exhibits will serve to transform the traditional museum experience into a dynamic and participatory one [38]. Lastly, in line with [1] “New Museology”, the museum will operate as a community space, fostering interactions, dialogue, and shared learning experiences. Collaborations with local artisans, schools, and cultural organizations will be integral to achieving this aim.

7.4 Exhibition Design and Layout

The overall design of the TF Museum needs an innovative approach, offering spaces that reflect the multi-dimensional nature of the TF heritage. Moreover, spaces need to cater to the needs of diverse audiences and incorporate the latest technological advancements to ensure a rich, immersive, and engaging visitor experience [37]. The museum can be envisioned as having multiple distinct yet interconnected spaces, each addressing specific aspects of the TF and their associated heritage: (a) Permanent and Temporary Galleries: this section could house a physical collection of trays, organized chronologically or thematically to depict the evolution of designs and styles over time, the pagan and religious origins of the festival, street decorations, changes within the festival organization, the role of the community in the development of decorations and building of the trays. By employing advanced lighting techniques and display strategies, the intricate details and craftsmanship of the trays can be highlighted [13]. (b) Multimedia Interactive Zone: a dedicated area with touch screens,

AR interfaces, and other digital installations could provide detailed information about the trays on display. It could also showcase the process of their creation, the meanings of their various symbols, and the context of their usage in religious processions [38]. (c) Virtual Reality Pavilion: this space could provide virtual reality headsets for visitors to experience a fully immersive, 360-degree journey through a traditional procession in Tomar, complete with crowds, chants, and the vibrancy of the festival [12]. (d) Educational Area: interactive educational games and digital workshops could be set up for children and students to learn about the cultural significance of trays but also creative areas where local artisans can be present while teaching youngsters how to develop paper flowers and the trays themselves echoing the principles of creative tourism learning activities [8]. These digital learning tools can be designed to cater to different age groups and learning styles, creating an engaging learning environment [48]. Through this innovative layout and design, the museum aims to offer an immersive and captivating journey that allows visitors to explore, learn about, and appreciate the TF's rich heritage.

7.5 Collection Management

The management of a collection is a central aspect of a museum's operations, requiring careful planning and strategic thinking [4]. For the TF Museum, the collection management strategy will be driven by the mission to preserve and promote the cultural heritage of the festival and trays. The museum will seek to achieve this by establishing robust procedures for acquiring, cataloguing, and conserving these artefacts and by fostering collaboration with other institutions or collectors. Acquisition: acquiring trays for the museum collection would necessitate a multipronged strategy. The museum could commission trays from local artisans, thereby ensuring that traditional craftsmanship is supported and celebrated. Also, donations from the local community or the acquisition of pieces from private collectors. Cataloguing: the museum could adopt a digital management system that records essential details such as the age, provenance, style, and condition of each item. Such a system could provide the basis for research and study and facilitate the dissemination of information to the public. Here, the work of [50] could be useful in providing guidelines on the creation of digital catalogues and the sharing of digital cultural heritage. Conservation: given the fragile nature of the trays, the museum would need to establish a robust conservation plan. This plan would include regular condition checks, conservation treatments as required, and optimal storage and display environments to minimize degradation over time [5]. Collaboration: collaborative initiatives with other institutions or collectors could prove mutually beneficial. The museum could consider loan agreements with other museums to display trays, thus expanding their reach. Likewise, knowledge exchange programs with other institutions could help in enhancing collection management practices [23]. Through a strong and inclusive collection management strategy, the TF Museum can effectively preserve and display these significant cultural artefacts.

7.6 Educational Programs

The role of museums extends beyond the exhibition of artefacts; they are now recognized as key educational institutions [18]. To fulfil this role, the TF Museum will offer a diverse range of educational programs that engage different age groups and cater to various learning styles. **Interactive Learning for Children:** the museum will prioritize engaging children in active, hands-on learning creative experience [8]. This could include interactive digital games about the history and cultural significance of trays, art workshops where children can design their digital trays, and storytelling sessions narrating the traditions surrounding the festival's immateriality [43]. **Lectures and Workshops for Adults:** adult learning can be facilitated through a series of lectures by experts in the field, discussing topics such as the craftsmanship of trays, design evolution, and religious context. Workshops could provide opportunities for adults to learn the traditional techniques of creating trays improving local cultural and creative capitals [8]. **Guided Tours:** these will offer visitors an overview of the collection, with guides providing information about individual tray's symbolism, and the context of their creation. Special tours could be designed for school groups, families, and tourists, tailored to the interests and needs of the group [6]. **Online Learning:** given the increasing trend towards digital learning, the museum will develop online resources, including educational videos, virtual tours, and downloadable learning materials. These resources would allow for self-paced learning and extend the museum's reach beyond its physical boundaries [3]. **Community-Based Learning:** the museum will collaborate with local schools and community groups to develop educational programs that reflect and serve the needs of the local community. This could include art competitions, community exhibitions, and cultural events [48]. Also, the presence of local artisans can be very important in these creative contexts providing enriching learning experiences.

7.7 Marketing and Promotion

A strategic marketing plan is vital for the TF Museum to attract visitors, raise awareness, and foster engagement. By leveraging traditional marketing techniques and digital platforms, the museum can ensure that its visibility and impact are optimized [22]. **Integrated Marketing Strategy:** the museum could develop a comprehensive marketing strategy that integrates offline and online marketing activities. This could include print advertisements in tourism brochures, collaborations with travel agencies, participation in cultural festivals, and special events at the museum [44]. **Brand Identity:** the museum needs to build a strong brand identity emphasizing its unique value proposition—the celebration and preservation of the TF heritage. All marketing materials should consistently communicate this brand identity. **Website and SEO:** the museum's website should serve as a central hub for information, ticketing, and online resources. An effective Search Engine Optimization (SEO) strategy can help

to ensure that potential visitors can easily find the museum online when searching for cultural activities in Tomar or general information about the TF [36]. **Social Media:** the museum should maintain active profiles on major social media platforms. Social Media can be used to share updates, promote upcoming events, and engage with followers. Creating engaging content such as behind-the-scenes videos, interactive quizzes, and live Q&A sessions with museum staff can help to build a strong online community [15]. **Email Marketing:** collecting email addresses from website visitors, ticket purchasers, and event attendees allows for direct communication with interested individuals. Regular newsletters can share updates, offer exclusive content or discounts, and keep the museum at the top of subscribers' minds [42]. **Partnerships and Collaborations:** collaborations with other cultural institutions, local businesses, schools, and community groups can help to extend the museum's reach. These partnerships can offer reciprocal promotional benefits and increase the museum's visibility in different sectors [21]. By combining effective marketing and promotion, the TF Museum can reach a wider audience, attract visitors, and further its mission of preserving and promoting its cultural heritage.

7.8 Sustainability

The long-term success of the TF Museum will depend significantly on its financial sustainability and community continuous involvement. This requires a multi-faceted strategy that not only generates income but also manages expenses effectively [26]. **Revenue Generation:** the museum can generate revenue through various sources, including admission fees, sales in the museum shop, hosting special events, offering workshops or courses, and renting out spaces for private functions. Additionally, establishing a membership program can create a steady income stream while building a loyal base of supporters [16]. **Grants and Funding:** applying for local, national, or international grants can provide significant funding. This may include arts and culture grants, educational grants, or technology grants, which could particularly support the museum's focus on integrating technology into its exhibits. **Partnerships:** partnerships with local businesses, educational institutions, and other cultural organizations can provide mutual benefits. For example, partnering with a local university might enable the museum to access research and development resources, while the university could benefit from practical, hands-on experience for its students [48]. **Crowdfunding and Donations:** in recent years, crowdfunding has emerged as a successful method for funding cultural projects. An engaging crowdfunding campaign can not only raise funds but also generate publicity and build a community of supporters. [32]. **Cost Management:** on the expenditure side, the museum can adopt various cost management strategies, such as energy-efficient lighting and heating [47], careful resource management, and volunteer programs to minimize staffing costs. **Sponsorships:** seeking sponsorships from corporate entities or philanthropic individuals is another avenue to explore. However, it is crucial to ensure that sponsorship agreements align with the museum's mission and ethical standards [31].

Financial sustainability for the TF Museum can be achieved through a combination of revenue generation, effective cost management, and leveraging various funding opportunities.

7.9 Conclusion

This paper proposes a comprehensive and innovative thematic concept for the TF Museum. The concept focuses on preserving and promoting the unique artistic and cultural heritage of the trays, while simultaneously offering an engaging, creative, and educational visitor experience. The plan detailed in this paper includes recommendations for creating a dynamic exhibition design and layout that integrates cutting-edge technology, such as VR and digital displays, with traditional artefacts, thereby enhancing immersive experiences. Additionally, strategies for acquiring, cataloguing, and preserving the trays were proposed, serving as a pillar for the museum's long-term sustainability. An array of educational initiatives targeted at various age groups, including interactive learning activities for children, lectures, and workshops for adults, guided tours, and the development of online learning resources is suggested. In terms of marketing and promotion, a combination of traditional and digital strategies, encompassing website optimization, social media engagement, were recommended to increase visibility, attract visitors, and promote active community engagement. For financial sustainability, the paper outlined strategies that include various revenue generation methods, grants, partnerships, crowd-funding, donations, cost management, and sponsorships. By embracing technology and community engagement, the TF Museum has the potential to become not only a local treasure but a national symbol of cultural preservation and promotion. In these rapidly changing times, the importance of such cultural preservation cannot be overstated, as it helps to maintain our link with the past, provide context for the present, and offer guidance for the future.

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Chapter 8

The Impact of Corporate Governance on Financial Performance: Study for Portuguese Hotel Companies



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Abstract The present work intends to analyze the relationship between the economic and financial performances of companies and the characteristics of their corporate governance. Based on Portuguese hotel companies, this study analyzes the importance on the performance of factors such as the size of the board of directors, women on the board, managing shareholder and the largest shareholder. Based on a sample of 3199 observations relating to companies in the hotel sector, a Tobit regression is used to highlight the impact of characteristics of the company's governance in its performance. As far as is known, this is the first study to link economic and financial performances with the characteristics of Portuguese hotel companies. The results obtained allow us to conclude that the percentage of the largest shareholder is negatively related to the financial performance of hotel companies. In this way, the companies with the largest shareholders are the companies that show a worse financial performance. It should be noted that both the size and gender of the members on the board of directors and the fact that the shareholder is simultaneously a director are not relevant to determine the financial performance of companies in the hotel sector. The results of this study contribute to a greater understanding of how companies are governed and how it affects their performance in a specific sector with a great impact on the national economy and corporate governance which affects companies in the hotel sector in Portugal.

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8.1 Introduction

In recent years, Portugal has witnessed a continuous and sustainable growth in international tourism. This sector is one of the most relevant sectors, impacting the growth of the Portuguese economy, contributing significantly to the trade balance, to the emergence of new infrastructures and to the creation of jobs. Thus, it is considered a fundamental strategic axis for the sustained development of the territory [1]. Within the tourism sector, hotel symbolizes what most contributes to the sector's revenue [2].

Bearing in mind that businesses in this sector are carried out by companies, and it is to be expected that this increase in the flow of tourists will be reflected in better economic and financial indicators in these companies. Thus, it becomes important to analyze the financial performance of companies in this sector, based on financial indicators such as liquidity, leverage, profitability, growth, and activity. The performance evaluation will allow stakeholders to analyze the company's financial health, as well as measure the degree of competitiveness among companies in the hotel sector [3]. In the evaluation of companies in this sector, companies are hierarchized through the construction of a ranking ordered based on financial performance. This ranking makes it possible to know the classification of companies against their competitors, in order to elaborate benchmarking [4].

The financial performance of companies will tend to reflect management and owner decisions. Companies with better characteristics at corporate governance will present better decisions and will reveal less problems of information asymmetry agency, which will be reflected in a better performance. The success of a company's financial performance can be justified by the main characteristics of the board of directors and the owners. Good governance practices can lead to a reduction in costs, such as borrowing costs, an increase in company value, and an improvement in risk management, with a positive impact on sustainable growth and improved company performance [5].

Several empirical studies have shown some of the characteristics of the board of directors in improving company performance. However, other studies have failed to observe significant relationships between government and company performances [5]. In another segment of tourism, [6] shows a positive relationship between the percentage of ownership by the largest shareholder and company performance, as well as an inverted-U relationship between the size of the board of directors and company performance. Thus, this article studies whether the companies with the best results in the ranking of financial performance are related to some of the characteristics of the board of directors and shareholders. As far as is known, there are no studies in the literature that analyze the relationship between the performance rankings with the characteristics of the board and shareholders, in the hotel sector in Portugal, which represents an innovative contribution to the literature.

The article is organized into four sections. Next, the literature review is presented. In the second section, we present the methodology. Subsequently, we present the

empirical study and discussion of the results. Finally, the main conclusions of the study, limitations, and avenues for investigation are at the end.

8.2 Literature Review

8.2.1 *Financial Performance*

The evaluation of companies' financial performance has a huge importance not only for managers, creditors, financial specialists, and current or potential investors, but also for competitors in the same sector of activity [7, 8]. The companies' performance can be an indicator that estimates how well an organization performs the established objectives [8].

The performance evaluation can help the company's management in decision-making, as through the evaluation of the performance of previous years, they are challenged and motivated to improve the company's performance every year [9]. In addition, it allows companies to compare their performance with that of others so that they can remain active in their competitiveness in the market [10]. Therefore, performance evaluation is one of the most efficient tools to assess the economic and financial situation of each company, allowing one to determine the condition in which each company is or has already been found [11]. This assessment has proved to be a crucial technique for deeply competitive industries [12].

The companies' performance evaluation is usually based on the companies' financial reports in order to know their financial and economic performance and the risks, as well as to foresee future events. This information is of great importance to various stakeholders, such as financial institutions, investment and commercial organizations, governments, and management [13]. Thus, performance can be measured through, for example, return, productivity, production, and economic growth [8, 12], the fulfillment of budgetary objectives [14], or applying the resources at their disposal to generate revenue [15]. This performance evaluation approach has been distinguished as the most powerful and relevant to carry out performance evaluation over a long period of time [9].

8.2.2 *Agency Theory*

Agency theory discusses the problems that arise in companies due to the separation between owner and management [16]. Thus, agency theory concerns an existing contract between two agents, namely between the principal (owner) and an agent (management). This relationship arises when the shareholder delegates in the manager the decision-making. Thus, the business owner expects managers to act

in his interests and on his behalf, maximizing his well-being. However, the difference in interests between management and ownership of the company may cause additional costs, known as agency costs. Agency costs refer to the costs incurred by shareholders to monitor managers to avoid actions that may cause them harm, the incentives given to managers to prevent them from taking actions that are against the interests of the owner, and the residual loss caused by sub-optimization of the manager with the objective of maximizing his well-being [17].

In the business context, agency costs arise essentially due to the asymmetry of information between the owner and the managers [18]. Thus, despite management wanting salary increases, bonuses, and increased job security in the face of the threat of dismissal [19], managers prefer to prioritize his wealth over maximizing the welfare of the owner in the presence of asymmetries of information, thus promoting their own interest at the expense of shareholders [20]. By making the company bigger, showing faster growth or performing better than expected, the manager's status will increase [19]. Therefore, management compensation generates a powerful incentive to manipulate corporate earnings to improve their financial statements [21].

8.2.3 Dependence Resource Theory

The dependence resource theory states that a company cannot sustain itself due to limited resources, leading it to relate to the external environment so that it can grow and develop activity [22]. However, the board of directors emerges as a means that helps the company, leading to a reduction in dependence on the external environment, since the board exploits essential external resources, such as technology, relevant information, and human and financial capital [23]. These resources are able to improve the efficiency of the company's decision-making [23] and reduce the costs associated with transactions [24]. Thus, reducing the company's dependence on the external environment allows the company to improve its performance and ensure its survival [24].

The dependence resource theory allows to justify the benefits of large boards, the presence of women, qualified directors, and foreigners with the fact that boards with these characteristics have more connections with the external environment of the company [25]. Based on this theory, companies expand their boards of directors to increase their ability to acquire external resources, to hold a greater diversity of knowledge and a greater connection with the outside world [26].

In this way, the dependence resource theory sustains that a board assists the company in the channels of communication with the external environment, advises the company in specific areas, legitimacy and enables the company to obtain access to necessary resources in a preferential way [27]. Thus, these resources are fundamental to the success of innovation, facilitating greater investments in R&D by the company [28], in which they add value to the company and contribute to performance [29]. Therefore, a larger board is likely to be more effective in securing the interests of

shareholders [30], more likely to see greater diversity with respect to experience, skills, gender, and nationality [31].

8.2.4 *Corporate Governance*

Corporate governance may be relevant within agency theory and resource dependence theory to determine the ranking of financial performance. Thus, several characteristics must be analyzed.

In companies with concentrated ownership, agency problems are expected because a majority shareholder may exercise their power to expropriate the gains of minority shareholders [32]. Large shareholders can affect the company's behavior when they engage in ownership control [33], as they have the capacity to acquire private benefits, transferring company resources out of the company, thus undermining the company's value [34]. The agency problem between the majority shareholder and minority shareholders [35] may be related to the fact that large shareholders can manipulate and obtain private profits to maximize their personal wealth at the expense of other shareholders. If large shareholders obtain financial resources for themselves, the value of the company will be lower [33]. However, large shareholders may have an inverse role for the company's value, if they adequately perform the role of monitoring and restricting activities that harm their wealth. Thus, the existence of large shareholders can result in lower agency costs and increased company performance [33].

Based on [33] conclusion that large shareholders can effectively bring negative consequences for minority shareholders and board members when seeking new financing, the following research hypothesis is studied for the accommodation sector:

H1: The financial performance of companies is negatively associated with the percentage of capital held by the largest shareholder.

The board of directors develops its activity in the best interests of the shareholders, although they also have their own objectives that may lead to agency problems, with an impact on improving the financial performance of companies [36]. Given the need to create balance among all members in defending the interests of the owners, minimizing agency costs, the size of the board of directors can influence the decision-making process, as well as the efficiency of the board [37].

There is no consensus in the literature regarding the ideal size of the board of directors. On the one hand, there are authors who argue that boards of directors with more members are more inefficient due to being more prone to the emergence of conflicts of interest and more difficult to reach a consent [38]. Smaller boards of directors are more cohesive and effective [30] and easier to organize, yet more difficult for the CEO to control [39]. However, on the other hand, from the perspective of dependence on resources, larger boards of directors can lead to a better connection between the company and the external environment [40].

Thus, the empirical results are not homogeneous [24] concluded that an increase in the size of the board of directors can have a positive association with the financial

performance of the company, while [41, 42] show an inverse association between company financial performance and company board of directors [41, 42]. Within the scope of companies in the hotel sector, we seek to understand whether:

H2: The size of the board of directors is negatively related to the financial performance of the company.

The division between management and ownership is pointed out as a source of potential conflicts of interest in companies [43]. However, when the directors of a company hold shares, there tends to be an alignment of interests between shareholders and directors because they are the same person [44]. According to the agency theory, companies should adopt a series of incentives in order to mitigate this problem [17], so that management assumes values-maximizing behaviors that do not damage the company's performance [43]. One of the most common ways to minimize conflicts of interest is through financial compensation to board members [45].

When shareholders and managers do not have interests aligned with maximizing wealth, substantial agency costs tend to arise [17]. Based on financial theory, one of the ways to eliminate or strongly minimize conflicts of interest between management and shareholders is related to the fact that the members of the board of directors are simultaneously shareholders. In this case, the personal interest of the manager is totally (or tends to be totally) coincident with the personal interest of the shareholder. Thus, greater internal ownership reduces agency costs and results in better firm performance [46]. Thus, with the aim of clarifying the importance that the shareholder being simultaneously a manager can have on the financial performance of the company, it is analyzed whether:

H3: Companies with directors who are simultaneously shareholders show better financial performance.

Traditionally, boards of directors have only male members [25]. However, in recent years, the diversity of members on the board of directors has been attracting attention, with discussions about the effects of women's participation in companies. It should be noted that in developed countries, there has also been an increase in regulations regarding the increase of the role of the female figure on boards of directors, in a way that ensures gender equality on the board [47].

According to [48], the diversity of members on the company's board of directors can allow the company to improve its performance, as the company's problems are seen from different perspectives, leading to the presentation of several solutions to the same problem. Female board members are considered more independent and more beneficial to the board, compared to the opposite gender [49], as women are more dedicated to their tasks. Thus, the diversity of members on the board of directors is considered an essential element to improve the value and financial performance of the company, as it provides new points of view, knowledge, and the ability to concentrate on several things at the same time [48, 49]. As such, it is intended to understand whether in the hotel sector:

H4: The percentage of women on the companies' board of directors is positively related to financial performance.

8.3 Methodology

In order to analyze the effect of governance characteristics on the financial performance of Portuguese hotel companies, it was necessary to collect economic and financial information about companies, as well as information about their owners and board of directors. This information was collected from the SABI database, in the period 2019 and 2020, that was in an “active” situation and with a turnover higher than €100,000. From here, it was possible to obtain data from 4206 companies corresponding to a total of 8412 observations. However, because some observations had missed data and the creation of the dependent variable, the database has 3199 companies.

Considering the objective and the research hypotheses developed, a regression model is formulated with the following specification:

$$\begin{aligned} \text{Scor}_{i,t} = & \beta_0 + \beta_1 \% \text{CAP}_{i,t} + \beta_2 \text{AD}_{i,t} + \beta_3 \text{ADAC}_{i,t} + \beta_4 \text{WOM}_{i,t} \\ & + \beta_5 \text{DIM}_{i,t} + \beta_6 \text{AGE}_{i,t} + \beta_7 \text{ATF}_{i,t} + \varepsilon_{i,t}, \end{aligned} \quad (8.1)$$

where $\text{Scor}_{i,t}$ —scoring of the company_{*i*} in year_{*t*}, calculated by the combination of FAHP-TOPSIS methods; $\% \text{CAP}_{i,t}$ —percentage of capital held by the majority shareholder on the company_{*i*} in year_{*t*}; $\text{AD}_{i,t}$ —size of the board of directors in the company_{*i*} in year_{*t*}; $\text{ADAC}_{i,t}$ —dummy variable that takes the value 1 if the shareholder is also a manager of the company_{*i*} in year_{*t*}, and 0 otherwise; $\text{WOM}_{i,t}$ —percentage of women on the board of directors in the company_{*i*} in year_{*t*}; $\text{DIM}_{i,t}$ —size of the company_{*i*} in year_{*t*}, represented by the logarithm of total assets; $\text{AGE}_{i,t}$ —age of the company_{*i*} in year_{*t*}; $\text{ATF}_{i,t}$ —ratio of tangible fixed assets to total assets in the company_{*i*} in year_{*t*}.

The dependent variable in this study is the scoring, which was constructed according to the study of [50]. This variable uses the results of that study. Thus, an economic-financial ranking of hotel companies in Portugal in 2020 was calculated based on a hierarchical model for evaluating financial performance, that was structured based on criteria and sub-criteria of liquidity, leverage, profitability, growth, and activity. Each of these criteria and sub-criteria is evaluated and weighted using the Fuzzy Analytic Hierarchy Process (FAHP) model. Then, these weights were used to classify the companies using the Technique for Order Preference by Similarity to Ideal Solution (TOPSIS), thus obtaining the ranking or scoring.

As the scoring variable presents values within an interval of 0 to 1, which characterizes the dependent variable, the Tobit estimation approach is adopted for the empirical study.

Tobit models refer to a regression model in which the range of the dependent variable is limited [51]. This statistical model was proposed by James Tobin in 1958, with the aim of explaining the relationship between a dependent variable and independent and latent variables [52]. They are also known as censored or bounded 0 to 1 regression models. The standard structure for a Tobit estimation is represented in Eqs. (8.1) and (8.2).

$$y_{i,t}^* = \alpha_0 + \beta X_{i,t} + \varepsilon_{i,t}, \tag{8.2}$$

where $y_{i,t}^*$ is a latent variable, $X_{i,t}$ is the set of explanatory variables and $\varepsilon_{i,t} \approx i.i.d.N(0, \sigma^2)$ and is independent of $X_{i,t}$. Unlike looking at $y_{i,t}^*$, we observe $y_{i,t}$:

$$y_{i,t} = y_{i,t*}, \text{ if } y_{i,t*} > y; = 0, \text{ if } y_{i,t*} \leq y, \tag{8.3}$$

where y is a non-stochastic constant, while the value of $y_{i,t}^*$ is absent when it is less than or equal to y . It should be noted that the Tobit model is usually based on the following assumptions: (i) the presence of an unlimited latent adoption variable that reflects a linear function of the forecast indicators and (ii) the residuals are characterized by a normal distribution [53].

8.4 Results and Discussion

This study seeks to understand whether companies in the accommodation sector with better financial performance are associated with the characteristics of the board of directors and shareholders. In addition to these corporate governance characteristics, other business characteristics are also analyzed, namely size, age, and tangibility. Table 8.1 presents some descriptive statistics of the variables used.

The descriptive statistics in Table 8.1 show that, on average, the financial performance of accommodation companies is situated at 34.7% of the ranking, reaching a maximum of 47.1% and a minimum of 18.5%. The average percentage held by the majority shareholder in the companies under analysis is 67.0%, with a standard deviation of 26.3%. The board of directors has, on average, 2912 members, with this variable being between 1 and 19 members. On average, 32.1% of the companies in

Table 8.1 Descriptive statistics

Variable	n	Average	Standard deviation	Minimum	Maximum
Scor _{i,t}	3199	0.347	0.007	0.185	0.471
%CAP _{i,t}	3199	0.669	0.263	0.000	1
AD _{i,t}	3199	2.912	2.135	1	19
WOM _{i,t}	3199	0.321	0.323	0.000	2
DIM _{i,t}	3199	13.390	1.850	7.112	19.700
AGE _{i,t}	3199	18.060	15.523	3	122
ATF _{i,t}	3199	0.506	0.331	0.000	0.996
		Dummy	n	%	
ADAC _{i,t}	3199	1 0	2680 527	83.6 16.4	

Source Own elaboration

this study have women on the board of directors. Table 8.1 also evidences that in 83.6% of the observations, the owner also performs functions in the board of directors or in the management of the company. The companies in the sample exhibit an average age of 18.06 years. As for the ATF indicator, this presents an average of 50.6%.

Next, Table 8.2 presents the Pearson correlation coefficients estimated for the variables under analysis. With regard to the analysis of the translated correlation coefficients, it can be seen that the ranking value (SCOR) is positively correlated with the variables: women on the board (WOM) and managing shareholder (ADAC). It is also possible to verify that the ranking value (SCOR) is negatively correlated with the remaining variables under study. The correlation between the variables board size and dimension is the strongest correlation in the study (54.3%). The next strongest correlation is 37.1% between board size and age.

Table 8.3 shows the estimation results of five Tobit regression models, where governance variables are used one by one individually and the last model uses all variables together. The estimation of the Tobit regression model shows three statistically significant variables: %CAP, DIM, and ATF. The analysis of the regression coefficients reveals that, for a significance level of 5%, the percentage of the majority shareholder is negatively related to the financial performance of companies (SCOR). Thus, companies in which the majority shareholder has a significant percentage of participation are those with the worst results in terms of financial performance, thus confirming H1. Validation of H1 corroborates the results of the study developed by [33], as companies with large shareholders are those whose company value is lower, due to the assumed behavior of these shareholders.

As expected, the AD variable has a negative coefficient, but it is not statistically significant. The ADAC variable, however, does not show the expected sign (positive sign) nor is it statistically significant. This result shows that these variables do not contribute to explain the financial performance (SCOR) of companies, thus not proving H2 and H3. For the variable MULH, as expected, it was possible to find a positive coefficient; however, it is not statistically significant. That is, the

Table 8.2 Pearson correlation coefficients

Variables	SCOR _{i,t}	% CAP _{i,t}	AD _{i,t}	ADAC _{i,t}	WOM _{i,t}	DIM _{i,t}	AGE _{i,t}	ATF _{i,t}
SCOR _{i,t}	1	−0.020	−0.079	0.070	0.033	−0.161	−0.067	−0.116
% CAP _{i,t}		1	−0.235	−0.070	−0.077	−0.038	−0.145	−0.166
AD _{i,t}			1	−0.555	−0.152	0.543	0.371	0.108
ADAC _{i,t}				1	0.210	−0.535	−0.264	−0.051
WOM _{i,t}					1	−0.209	−0.043	0.008
DIM _{i,t}						1	0.362	0.309
AGE _{i,t}							1	0.101
ATF _{i,t}								1

Source Own elaboration

Table 8.3 Performance and corporate governance

Variable	(1)		(2)		(3)		(4)		(5)	
Const	35.558	***	35.501	***	35.538	***	35.475	***	35.632	***
ADAC _{i,t}					−0.022				−0.042	
WOM _{i,t}							0.014		0.010	
AD _{i,t}			0.003						−0.004	
%CAP _{i,t}	−0.107	**							−0.118	**
AGE _{i,t}	−0.001		−0.001		−0.001		−0.001		−0.001	
ATF _{i,t}	−0.177	***	−0.166	***	−0.164	***	−0.168	***	−0.175	***
DIM _{i,t}	−0.052	***	−0.055	***	−0.056	***	−0.053	***	−0.054	***
n	3199		3199		3199		3199		3199	

Notes This table presents the results of Tobit estimation for the scoring dependent variable. It is shown the variable coefficient. ***, **, and * refer to the statistical significance of 1%, 5%, and 10%, respectively.

Source Own elaboration

percentage of women on the board (WOM variable) does not help to explain the financial performance (SCOR) of companies, thus not validating H4.

About the control variables, only DIM and ATF variables help to explain the model. The results evidence that there is a relationship between the dimension (DIM) and the ranking (SCOR), for a p-value < 0.01. The same is true for the relationship between the indicator that evaluates the business model (ATF) and the ranking (SCOR). However, the AGE control variable does not contribute to explain the ranking value, since it is not statistically significant.

8.5 Conclusion

In Portugal, the hotel sector has been growing and gaining an increasingly key role. Thus, the main objective of this study was to analyze the characteristics of companies, more specifically, the characteristics of the board and owners, which most contribute to the financial performance of Portuguese companies in the hotel sector.

Based on data from the years 2019 and 2020 for companies in the hotel sector, the results obtained by the Tobit regression show that the characteristics that most contribute to financial performance are %CAP, DIM, and ATF, that is, the value of ranking is only statically explained by these variables. The majority shareholder of the company shows a negative and significant relationship with the ranking, according to the expected trend, that is, the hotel companies where the majority shareholder has a significant percentage (above average) have a worse financial performance. As for the remaining research hypotheses, it was not possible to validate them, as they are not statistically significant, but presented the expected coefficient sign, with the

exception of the ADAC variable. Finally, the dimension and the AFT/total assets' indicator showed a significant and negative relationship with the ranking.

This investigation contributes to a better knowledge of the type of characteristics of the board of directors and ownership present in Portuguese companies from hotel sector when evaluating their financial performance.

Finally, for future studies, we suggest the analysis of other characteristics of the board of directors and other characteristics of ownership for Portuguese hotel companies. Additionally, we recommend applying this study in other Portuguese industries.

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Conflict of Interest The authors declare that there is no conflict of interest.

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Chapter 9

The Influence of the Senior Tourist Profile on the Assessment of the Dimensions of Well-Being and Quality of Life



Maria Carlos Lopes , Dália Liberato , and Elisa Alén

Abstract Quality of life is a construct that has been much debated and that has caused persistent challenges in the realization of a definition. Due to its multidimensional character, and because its nature comprises the physical, economic, mental, social, environmental, among others, and not least, because this construct depends on the values and perceptions of the individuals involved, a consensual definition has not yet emerged among the various areas of knowledge that have been concerned with its study over the last decades, and ranging from psychology, health, sociology, economics, politics, among others. The decision of elderly tourists to travel is compromised by their perception of well-being and quality of life. In this sense, it is essential that, in measuring the quality of life of the elderly population, the following dimensions of well-being are considered: social well-being; physical well-being; psychological well-being; spiritual well-being; cognitive well-being; and well-being in the family environment. Considering the assumptions of (Kelley-Gillespie in Appl. Res. Qual. Life 4:259–282, 2009), a questionnaire was elaborated that was applied to 917 senior tourists, from the north of Portugal and Galicia, to understand when their profile influences the dimensions of well-being considered and, therefore, their perception of quality of life. The results revealed the importance of sociodemographic variables: qualifications, employment status, income, and country of residence, as positive constraints in the perception of the quality of life of senior tourists.

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9.1 Introduction

The phenomenon of ageing is transversal to most of the countries of the world except for some countries in Africa, Asia, and some countries of the American continent.¹ According to the UN (2019), the number of individuals over the age of 60 will increase from 962 million in 2017 to 3.1 billion in 2100. This phenomenon triggers several constraints at the social, economic, political, health, and other dimensions, especially with regard to the quality of life experienced by this segment of the population.

The concept of quality of life covers the entire spectrum of individuals' lives and assumes special importance in the lives of older individuals. This segment of the population corresponds to the Baby boomer generation—they are the individuals who were born in the period called the baby boom, which occurred between 1945 and 1964—and are currently between 59 and 78 years old. This group of individuals presents itself as the first generation with a great appetite for activities related to leisure, namely tourism [17]. These individuals are characterized by having a lot of time available, by not having dependents in charge, by having made significant savings from a lifetime of work, and by being interested in cultural, relaxation, and socializing activities [21].

Baby boomers are great lovers of thematic travel, of visiting museums, enjoy contact with local culture and traditions, and have a special interest in discovering the various cultural differences between countries or peoples [10]. Reference [16] adds that baby boomers carry out tourist activities in need of change and novelty, like to have fun, seek moments of relaxation and activities that allow them to relieve stress. In addition, they like to enjoy landscapes and take care of the physical aspect, so they tend to look for activities within the scope of tourism that allow them to meet these needs.

Elderly tourists are a segment of tourism that by the characteristics that are intrinsic to them tend to travel outside the high season, arousing, therefore, great interest on the part of tourist companies that tend to adapt their tourist packages to the needs of this segment, in order to have higher occupancy rates in low seasons and thus decrease their seasonality rates. It is in the total interest of these companies to understand the needs of tourists, as well as the aspects that are valued by them within each dimension of well-being, so that they can provide them with travel packages and tourist activities that meet their standards of quality of life.

9.2 Concept of Quality of Life, Dimensions, and Evolution

The concept of quality of life first has emerged in the year 1963, a few years after Maslow introduced us to the pyramid of needs in 1962.

According to [2] currently, there will already be more than 100 definitions of quality of life; however, no definition has yet raised consensus among scholars of

¹ <https://www.visualcapitalist.com/cp/charted-the-worlds-aging-population-1950-to-2100/>.

this matter [8]. Reference [20] considers that this multiplicity of supposed definitions of QoL comes from the fact that it is difficult to distinguish between the terms of well-being and happiness.

References [6, 9] consider that the concept of quality of life involves the subjective and objective dimension that integrates seven domains: material well-being, emotional well-being, health, productivity, intimacy, security, and place in the community. For these authors, there are also two axes, the objective and the subjective, and in the first is where the tangible aspects of life are reflected; and in the second is where individual feelings of satisfaction with life are analyzed.

In an attempt to make a contribution to the concept of quality of life [15] state that:

Quality of life is an eminently human notion, which has been approximated to the degree of satisfaction found in family, loving, social and environmental life and to the existential aesthetic itself. It presupposes the ability to effect a cultural synthesis of all the elements that a given society considers its standard of comfort and well-being. The term encompasses many meanings, which reflect knowledge, experiences and values of individuals and collectivities that refer to it in various different times, spaces and histories, being, therefore, a social construction with the mark of cultural relativity.

According to [4], the general assessment of human experiences has been termed 'quality of life'. The authors also consider that the term quality of life, in general, is used both to determine how much human needs are met and to describe the degree of perception of satisfaction of the needs of individuals in the various domains of their lives. In turn, [7] considers that the construction of quality of life refers to the evaluation of the well-being of individuals and societies in general, with key indicators of well-being [22].

The studies developed by [1, 3–5, 11, 13, 24, 27] used several approaches in order to classify and measure the various dimensions of quality of life, from which the following components have emerged: basic physiological needs; security needs, belonging needs, and self-esteem needs.

In turn, also with the objective of clarifying and measuring the concept of quality of life, but from the perspective that it was reflected in the context of the elderly, [11] was based on the already existing constructs of quality of life existing in the literature, but adequate so that they could be applied to elderly people. The author preceded the consolidation of these constructs and obtained six main domains of quality of life: social well-being, physical well-being, psychological well-being, spiritual well-being, cognitive well-being, and well-being in the family environment, each of which integrates a wide set of quality of life indicators. Still, and having the model in question the focus on the elderly population, [11, 18] was careful to meet in its construction the General Theory of Systems that evidences the changes that are happening within the systems over time, that is, the importance of the relationships between people and the various systems that influence their behaviours, life circumstances, and quality of life.

In this continuation, the author elaborated a review of the in-depth literature from which she removed the concepts and the main aspects of these concepts of quality of life, conveyed by numerous authors. He then compiled all the important aspects

of each concept, synthesized them, and integrated each of them into one of the six domains of quality of life that corresponded to them. Each of these aspects is configured in a situation common to people's lives in general and that, in some way, influences the satisfaction of the person in this domain of quality of life.

The list of elements that are part of each of the domains of quality of life presented by the author is quite extensive, so that we too, after an exhaustive review of all the elements referenced by each of the authors, present those that more authors considered to be fundamental in the definition of the concept of quality of life.

9.3 Methodology

The research included questionnaires to assess the quality of life perceived by thermalists and elderly tourists from other tourism segments other than health and wellness tourism, Galicia and Northern Portugal. To the thermal tourists, in the region of Galicia, 247 questionnaires were applied in the period between September and December 2019, distributed by several thermal resorts: Balneário de Augas Santas, Hotel Balneário do Lugo, Hotel Balneário de Lobios, and Hotel Balneário de Laias. In the same period, in the North of Portugal, 177 questionnaires were applied, also in several thermal resorts: Termas de Chaves, Termas de Caldelas, Termas de Monção, and Termas das Caldas da Saúde. In relation to other tourists, in the Galicia region, 281 questionnaires were applied, from November 2019 to February 2020, while in the north of Portugal, 212 questionnaires were applied, during the period between August 2019 and February 2020.

The first part of the questionnaire contained six questions related to the individual profile of the respondents: gender; age; qualifications; employment situation; individual gross monthly income, country of origin, and another that differentiated them in relation to the type of tourism they had experienced on the last trip.

The second part of the questionnaire aimed to assess how much the quality of life of senior tourists is influenced by day-to-day factors related to social well-being; physical well-being; psychological well-being; spiritual well-being; cognitive well-being; and well-being in the family environment.

9.4 Relationships Between the Dimensions of Well-Being that Measure Quality and the Individual Profile and Their Results

In this part we will evaluate whether the different sociodemographic variables—gender, age, level of education, employment status, income, and country of origin—influence the valuation of the different dimensions proposed to measure quality of life. The presentation of the analysis will be carried out for the total sample, indicating

only the cases, in which, depending on the tourist typology analyzed (thermalists versus other tourists), there are evaluative results to be mentioned.

First, the gender variable is related to the valuation of the different dimensions of the well-being construct and the inherent measurement of quality of life. It is possible to observe in Table 9.1 that only statistically significant relationships between men and women are identified for the dimension spiritual well-being, presenting women with superior ratings. In the remaining dimensions, women also have higher scores, although the differences are not statistically significant. The same behaviour was observed for thermalists. In the case of other tourists, no dimension presents a significant difference in valuation according to gender.

The relationships between age and quality of life are observed in Table 9.2. Only statistically significant differences were found in the valuation of the dimension spiritual well-being. In this case, there is a higher evaluation for respondents over the age of 70 years (greater than 3.8) compared to the other age groups (less than 3.45) (Tukey's test: $p < 0.01$). There are no noticeable differences in behaviour in valuation, if we take into account the two segments of tourists.

The evaluation of the effects of the level of education in the evaluation of quality of life evidences a superior effect between these two variables. It is possible to observe in Table 9.3 that there is a relation to almost all dimensions except the well-being in the family environment, where not there are differences statistically significant among qualifications.

When the differences are significant, the behaviour in the different dimensions is similar because the higher evaluations correspond to higher levels of education,

Table 9.1 Descriptive statistics and t-tests: relationships between dimensions of well-being—quality of life—and gender, in total tourists

		<i>N</i>	Average	Detour pattern	<i>t</i>	<i>p</i>
26. Social well-being	Male	336	3.25	0.774	−0.720	0.472
	Female	581	3.29	0.743		
27. Physical well-being	Male	336	3.67	0.811	−1.741	0.082
	Female	581	3.77	0.747		
28. Psychological well-being	Male	336	4.15	0.701	−1.334	0.183
	Female	581	4.22	0.700		
29. Spiritual well-being	Male	336	3.41	0.821	−3.102	** 0.002
	Female	581	3.60	0.888		
30. Cognitive well-being	Male	336	4.07	0.799	−0.622	0.534
	Female	581	4.11	0.808		
31. Well-being in the family atmosphere	Male	336	4.17	0.699	−1.502	0.133
	Female	581	4.24	0.672		

** $p < 0.01$, * $p < 0.05$

Table 9.2 Descriptive statistics and ANOVA tests: relationships between dimensions of well-being—quality of life—and age, in total tourists

		<i>N</i>	Average	Detour pattern	<i>F</i>	<i>p</i>	Post hoc Tukey
26. Social well-being	55–59 years	278	3.22	0.81	0.750	0.558	
	60–64 years	199	3.30	0.79			
	65–69 years	161	3.28	0.68			
	70–74 years	148	3.26	0.70			
	75 years or older	131	3.35	0.73			
27. Physical well-being	55–59 years	278	3.72	0.84	0.745	0.561	
	60–64 years	199	3.68	0.84			
	65–69 years	161	3.74	0.69			
	70–74 years	148	3.74	0.65			
	75 years or older	131	3.82	0.72			
28. Psychological well-being	55–59 years	278	4.25	0.70	1.784	0.130	
	60–64 years	199	4.26	0.77			
	65–69 years	161	4.13	0.69			
	70–74 years	148	4.14	0.64			
	75 years or older	131	4.11	0.65			
29. Spiritual well-being	55–59 years	278	3.34	0.80	12.326	** 0.000	70–74, 75 +
	60–64 years	199	3.45	0.89			>
	65–69 years	161	3.45	0.96			55–59, 60–64, 65–69
	70–74 years	148	3.83	0.81			
	75 years or older	131	3.80	0.78			
30. Cognitive well-being	55–59 years	278	4.09	0.84	1.385	0.237	
	60–64 years	199	4.12	0.82			
	65–69 years	161	3.97	0.79			
	70–74 years	148	4.12	0.76			
	75 years or older	131	4.18	0.77			
31. Well-being in family atmosphere	55–59 years	278	4.28	0.70	2.156	0.072	
	60–64 years	199	4.25	0.70			
	65–69 years	161	4.09	0.67			

(continued)

Table 9.2 (continued)

		<i>N</i>	Average	Detour pattern	<i>F</i>	<i>p</i>	Post hoc Tukey
	70–74 years	148	4.18	0.64			
	75 years or older	131	4.23	0.65			

** $p < 0.01$, * $p < 0.05$

with the exception of spiritual well-being that decreases with the increase of qualifications, being significantly higher for basic compared to secondary, university, and doctorate (Tukey's test: $p < 0.010$). Specifically, for social well-being, the valuations are significantly higher for university students compared to secondary students (Tukey's test: $p = 0.009$). In the dimension bin physical being, the values are higher for basic, secondary, university, and master's degree compared to doctorate (Tukey's test: $p < 0.050$). Psychological well-being is verified more for master's degrees and less for basic and secondary (Tukey's test: $p = 0.003$). As far as cognitive well-being is concerned, it is significantly higher for basic and university compared to secondary (Tukey's test: $p < 0.050$).

With regard to other tourists, no significant differences were found in the valuation of psychological well-being, spiritual well-being, and well-being in the family environment. The evaluation of the group of thermalists reveals that there are no differences in evaluation in the case of social well-being and physical well-being.

For both segments, in the dimensions in which these evaluations are significantly different according to the educational level, the behaviour is similar to that identified for the total sample. The only exception is pointed out for the spiritual well-being of the thermalists, since those who have a basic educational level assigned higher evaluations than the higher educational levels.

Next, the relationship between the work situation and the quality of life evaluations will be evaluated. The results are summarized in Table 9.4. It is possible to prove that there are differences in valuation for the dimensions spiritual well-being and cognitive well-being, while for the other dimensions the differences are not statistically significant.

In the case of spiritual well-being, evaluations are significantly higher for retirees/pensioners compared to full-time workers (Tukey's test: $p < 0.001$). Cognitive well-being, on the other hand, is more observed for part-time workers, followed by full-time and retired/pensioner workers and less for the unemployed, with statistically significant differences ($p = 0.031$). This assessment may be due to the fact that the situation of unemployed is the result of an imposition and may thus reduce the assessment of well-being.

The analysis of the data by tourist segments offers a slightly different view, since, in the case of other tourists, different evaluations are observed according to the employment situations, for the dimensions of psychological well-being, spiritual

Table 9.3 Descriptive statistics and ANOVA tests: relationships between dimensions of well-being—quality of life—and qualifications, in the total number of tourists

		<i>N</i>	Average	Detour pattern	<i>F</i>	<i>p</i>	Post hoc Tukey
26. Social well-being	Primary education	194	3.27	0.78	3.950	** 0.003	Uni. > Sec
	Secondary education	292	3.18	0.70			
	University education	386	3.37	0.78			
	Masters	21	3.04	0.72			
	Doctorate	24	3.03	0.59			
27. Physical well-being	Primary education	194	3.73	0.74	5.639	** 0.000	Bás., Sec., Uni., Mest.
	Secondary education	292	3.68	0.76			>
	University education	386	3.81	0.78			Dout.
	Masters	21	3.79	0.82			
	Doctorate	24	3.09	0.75			
28. Psychological well-being	Primary education	194	4.13	0.77	4.296	** 0.002	Uni. > Sec
	Secondary education	292	4.09	0.68			
	University education	386	4.29	0.68			
	Masters	21	4.44	0.61			
	Doctorate	24	4.20	0.58			
29. Spiritual well-being	Primary education	194	3.83	0.88	8.535	** 0.000	Bas.
	Secondary education	292	3.43	0.81			>
	University education	386	3.49	0.90			Sec., Uni., Dout.
	Masters	21	3.38	0.69			
	Doctorate	24	3.13	0.54			
30. Cognitive well-being	Primary education	194	4.10	0.83	7.833	** 0.000	Bas., Uni. > Sec
	Secondary education	292	3.90	0.78			
	University education	386	4.24	0.78			
	Masters	21	4.14	0.74			

(continued)

Table 9.3 (continued)

		<i>N</i>	Average	Detour pattern	<i>F</i>	<i>p</i>	Post hoc Tukey
31. Well-being in familiar environment	Doctorate	24	4.00	0.90			
	Primary education	194	4.23	0.74	1.659	0.157	
	Secondary education	292	4.14	0.67			
	University education	386	4.27	0.65			
	Masters	21	4.32	0.66			
	Doctorate	24	4.19	0.76			

** $p < 0.01$, * $p < 0.05$

well-being, and cognitive well-being. These dimensions have lower evaluations for spiritual well-being in the case of thermalists.

In the case of the psychological well-being of other tourists, the assessment is significantly higher for full-time worker compared to retiree/pensioner (Tukey's test: $p < 0.050$). Cognitive well-being is better assessed by full-time workers compared to retired/pensioners and the unemployed (Tukey's test: $p < 0.050$) and for part-time workers compared to the unemployed (Tukey's test: $p < 0.050$). In the case of spiritual well-being, the behaviour is similar to that of the overall sample.

If we evaluate the spiritual well-being of thermalists, we will see higher values for retired/pensioner compared to inactive/others and full-time worker (Tukey's test: $p < 0.050$).

Next, income and evaluations related to the different dimensions of quality of life are related. It is possible to observe in Table 9.5 differences in three of the dimensions (physical well-being, spiritual well-being, and cognitive well-being). Concretely, spiritual well-being is higher for people with lower incomes, while in the case of cognitive well-being, it is significantly higher for values between 2001 and 3000 € compared to incomes up to 1000 €.

In the case of other tourists, all dimensions of quality of life, except for spiritual well-being, obtain different evaluations depending on the level of income, while in the case of thermalists, there are only differences in the case of spiritual well-being and cognitive well-being. There are no results to highlight, observing in general, higher levels of well-being, for higher incomes as well, except for the values already commented earlier, and observed in spiritual well-being.

Finally, it is ascertained whether the country of origin exerts any influence on the evaluations attributed to the quality of life. In Table 9.6 relative to the total number of tourists, it is possible to see how there are only differences for the case of size cognitive well-being, to which the Portuguese attributed significantly higher ratings than the Spaniards. In the case of the country of origin, there are very marked differences depending on the segment of tourists considered. In the sample of thermalists, the

Table 9.4 Descriptive statistics and ANOVA tests: relationships between dimensions of well-being—quality of life—and the employment situation, of the total number of tourists

		<i>N</i>	Average	Detour pattern	<i>F</i>	<i>p</i>	Post hoc Tukey
26. Social well-being	Retired/pensioner	425	3.28	0.69	1.082	0.364	
	Unemployed	29	3.18	0.94			
	Inactive/other	39	3.13	0.85			
	Tr. full-time	386	3.27	0.79			
	Tr. part-time	38	3.46	0.80			
27. Physical well-being	Retired/pensioner	425	3.74	0.72	0.515	0.725	
	Unemployed	29	3.66	0.95			
	Inactive/other	39	3.59	0.80			
	Tr. full-time	386	3.74	0.82			
	Tr. part-time	38	3.82	0.67			
28. Social well-being	Retired/pensioner	425	4.15	0.67	1.188	0.314	
	Unemployed	29	4.13	0.87			
	Inactive/other	39	4.10	0.78			
	Tr. full-time	386	4.25	0.71			
	Tr. part-time	38	4.25	0.70			
29. Spiritual well-being	Retired/pensioner	425	3.73	0.83	11.571	** 0.000	Ref/Pens
	Unemployed	29	3.41	1.02			>
	Inactive/other	39	3.38	0.96			TTCComp
	Tr. full-time	386	3.33	0.85			
	Tr. part-time	38	3.63	0.79			
30. Well-being cognitive	Retired/pensioner	425	4.09	0.79	2.664	* 0.031	Ref/Pens
	Unemployed	29	3.67	0.90			TTCComp
	Inactive/other	39	3.97	0.82			TTParc
	Tr. full-time	386	4.13	0.81			>
	Tr. part-time	38	4.22	0.76			Development
31. Well-being in the environment familiar	Retired/pensioner	425	4.19	0.65	0.774	0.542	
	Unemployed	29	4.23	0.73			
	Inactive/other	39	4.10	0.85			
	Tr. full-time	386	4.25	0.70			
	Tr. part-time	38	4.28	0.69			

** $p < 0.01$, * $p < 0.05$

Table 9.5 Descriptive statistics and ANOVA tests: relationships between dimensions of well-being—quality of life—and income, in total tourists

		N	Average	Detour pattern	F	p	Post hoc Tukey
26. Wellness social	Up to 1000 €	227	3.18	0.68	1.465	0.211	
	1001–2000 €	305	3.27	0.73			
	2001–3000 €	182	3.35	0.80			
	More than 3000 €	52	3.20	0.67			
	NS/NR	79	3.31	0.77			
27. Wellness physical	Up to 1000 €	227	3.69	0.73	2.720	** 0.029	2001–3000 €
	1001–2000 €	305	3.72	0.72			>
	2001–3000 €	182	3.86	0.86			NS/NR
	More than 3000 €	52	3.65	0.79			
	NS/NR	79	3.56	0.79			
28. Wellness psychological	Up to 1000 €	227	4.11	0.72	1.274	0.278	
	1001–2000 €	305	4.20	0.67			
	2001–3000 €	182	4.25	0.68			
	More than 3000 €	52	4.24	0.51			
	NS/NR	79	4.13	0.77			
29. Wellness spiritual	Up to 1000 €	227	3.72	0.88	5.054	** 0.000	Up to 1000 €
	1001–2000 €	305	3.50	0.84			>
	2001–3000 €	182	3.46	0.76			1001–2000 €
	More than 3000 €	52	3.20	1.00			2001–3000 €
	NS/NR	79	3.52	0.98			More than 3000 €
30. Wellness cognitive	Up to 1000 €	227	4.01	0.85	3.771	** 0.005	2001–3000 €

(continued)

Table 9.5 (continued)

		N	Average	Detour pattern	F	p	Post hoc Tukey
	1001–2000 €	305	4.07	0.75			>
	2001–3000 €	182	4.26	0.75			Up to 1000 €
	More than 3000 €	52	4.04	0.80			NS/NR
	NS/NR	79	3.92	0.84			
31. Wellness in the environment familiar	Up to 1000 €	227	4.15	0.68	1.488	0.204	
	1001–2000 €	305	4.24	0.64			
	2001–3000 €	182	4.25	0.70			
	More than 3000 €	52	4.22	0.60			
	NS/NR	79	4.08	0.72			

** $p < 0.01$, * $p < 0.05$

evaluations of the Portuguese were, for all dimensions, significantly higher than those attributed by the Spaniards. In the case of other tourists, these differences are not observed for social well-being and psychological well-being. Assessments of cognitive well-being were significantly higher for the Portuguese. However, with regard to the other dimensions (physical well-being, spiritual well-being, and well-being in the family environment), the evaluations of the Spaniards were higher.

In summary, it is possible to affirm that the individual profile influences the perception of quality of life, which is verified for the dimensions and variables indicated in Table 9.7.

9.5 Discussion of Results

In the comparative analysis of gender with the dimensions of quality of life, it was possible to observe that women present a higher evaluation in the dimension of spiritual well-being, both in the sample of total tourists and in the sample of thermalists. It is also concluded that it is in the age group from 70 that there is a higher evaluation in the dimension of spiritual tourism. The fact that women have attributed higher ratings to spiritual well-being is in line with the study by [12] who reported that women constitute the main market for spiritual retreat tourism.

Relating the qualifications of the global sample of tourists with the dimensions of well-being and, consequently, in the quality of life, we observed that these only

Table 9.6 Descriptive statistics and t-tests: relationships between dimensions of well-being—quality of life—and the country of origin, in total tourists

		<i>N</i>	Average	Detour pattern	<i>t</i>	<i>p</i>
26. Social welfare	Portugal	389	3.33	0.736	1.867	0.062
	Spain	528	3.23	0.766		
27. Physical well-being	Portugal	389	3.76	0.775	1.024	0.306
	Spain	528	3.71	0.769		
28. Psychological well-being	Portugal	389	4.22	0.624	1.191	0.234
	Spain	528	4.17	0.752		
29. Spiritual well-being	Portugal	389	3.58	0.925	1.330	0.184
	Spain	528	3.50	0.823		
30. Cognitive well-being	Portugal	389	4.24	0.721	4.794	** 0.000
	Spain	528	3.99	0.845		
31. Well-being in the family atmosphere	Portugal	389	4.23	0.614	0.490	0.624
	Spain	528	4.21	0.729		

** $p < 0.01$, * $p < 0.05$

have no interference in the dimension of well-being of the family environment, and there are, therefore, in the other dimensions, significant differences depending on the academic degree. Thus, there is more social, physical, and cognitive well-being for those who have an academic degree and, on the contrary, there is more spiritual well-being for those who have basic education. For the samples of other tourists and thermalists, the evaluation trend is the same as that recorded in the total sample. [26] also considered that the motivations of elderly tourists are much more related to the needs of personal growth, feelings of self-realization, and nostalgic reminiscence. In the same perspective, [14, 19, 23] observed that the motivations of elderly tourists were much more related to aspects of personal growth, relationships with friends and family, and feelings of nostalgia.

When, in the present investigation, the work situation was related to the dimensions of quality of life, higher evaluations of spiritual well-being were obtained for those who are retired compared to those who work full-time, and higher evaluations in cognitive well-being for individuals with part-time work, followed by those who work full-time. In the sample of other tourists, there was more psychological and cognitive well-being for those who work full time, and in the sample of thermalists, there was more spiritual well-being for those who are retired.

Regarding incomes, it was possible to verify that, in general, for both samples, high incomes correspond to high levels of well-being in all dimensions, with the exception of what happens with spiritual well-being where there are higher levels of evaluation of this dimension of well-being for lower incomes.

Table 9.7 Summary of the relationships between the main sociodemographic variables and quality of life

Variables	Gender		Age		Educational level		Employment		Income		Country	
	To	You	To	You	To	You	To	You	To	You	To	You
Dim. welfare												
Social					✓				✓			✓
Physical					✓				✓		✓	✓
Psychological					✓			✓	✓			✓
Spiritual	✓		✓	✓	✓		✓		✓	✓	✓	✓
Cognitive					✓		✓		✓	✓	✓	✓
Family atmosphere									✓		✓	✓

To: aggregate sample; Tu: group of other tourists; Te: thermalists

9.6 Conclusions and Limitations of the Study

All variables of the profile of the senior tourist influence the perception of spiritual well-being, except for the variables gender, education and income for the sample of other tourists, and the variable, country, in relation to the overall sample of tourists.

It was also concluded that the variable educational level influences the perception of well-being in all dimensions, except for the dimension well-being in the family environment in the global sample of tourists. This variable has a lot of influence on the dimensions of social, physical, and cognitive well-being in the sample of other tourists. Still regarding the variable educational level, it is verified that this exerts a lot of influence on the dimensions of psychological, spiritual, cognitive, and family environment well-being in the sample of thermalists.

The income variable influences the global sample of tourists in the dimensions of physical, spiritual, and cognitive well-being. The same variable influences the sample of other tourists in the dimensions of social, physical, psychological, and family well-being.

Ultimately, we have the country variable, which influences, especially, the sample of other tourists, in the dimensions of physical, spiritual, cognitive, and family well-being, and influences the sample of thermalists in all dimensions of well-being.

The limitations of this study are related, especially, to the methodology used, because having the intended answers such a personal and subjective character, it would be very beneficial in terms of quality of information, to opt for the qualitative methodology. This awareness comes from having felt on the part of the tourists surveyed a need to respond beyond what was determined in the questionnaire, so that much relevant information that was related to their needs and motivations, was no longer included, and analyzed.

This research, from the perspective of health and wellness tourism, was carried out to senior tourists who experienced the thermal resorts and thermal spas, on the side of Portugal and on the side of Galicia, respectively. In this context, the results of the typology of wellness tourism are specific, only, to an activity that comprises the typology of health and well-being tourism—thermalism—so it is not demonstrative of the characteristics and behaviours of health tourists and well-being as a whole.

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Chapter 10

Experiences of Backpackers: An Overview of Publications



Ana Cristina Silvério  and Paula Odete Fernandes 

Abstract Backpacking tourism has been shown to have considerable economic, cultural, social, and environmental effects, resulting in numerous benefits for developing and developed countries. But although the backpacking tourism segment has evolved, it is recognised that the literature has underestimated the importance of this subsector, focusing mainly on the identity and authenticity aspects of backpackers and the positions of local communities. Therefore, this research aims to explore the theoretical currents of backpackers' emotional experiences in the face of the development of backpacking tourism. Through a search in the Web of Science database, 50 documents were selected, which were systematically analysed and subjected to bibliometric analysis using two techniques: bibliographic coupling and cluster analysis. From the results, it was possible to identify and categorise the theoretical trends, classifying them into four groups: (i) backpacking tourism in the local community, (ii) antecedents of backpackers' emotions, (iii), dominant factors of backpackers' experience (iv) attributes of backpackers. This methodology can help to provide an overview of the most developed areas of study in the emerging field of backpacking tourism, helping those who are starting their research to address specific topics and therefore to establish them. This research aims to make a theoretical contribution to backpacking tourism, as well as to help tourism managers define strategies to achieve the economic, social, and environmental benefits associated with backpackers.

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10.1 Introduction

In the previous decade, tourism skyrocketed and was expected to continue to grow in the near future as a key sector for the progress of developing countries [1]. Recently, the global growth of the tourism sector is also a driver for developed countries [2]. One of the necessary conditions to ensure that tourism continues to grow is the participation of local communities and their active promotion by the government [3, 4]. The backpacker categorisation emerged in 1970 as an important tourist group for developing countries, due to their interest in consuming local products and services, in an attempt to spend little money on a destination and interact with the local community [5, 6].

Backpacking tourism represents a recent phenomenon that has attracted the attention of researchers due to its heterogeneity and complexity, social, and economic relevance as well as its cultural and ethnographic characteristics [7–10]. This tourism, a subsector of international tourism, has certain characteristics, such as communication networks, the demand for cheap accommodation and a parallel structure of transportation, restaurants, accommodation, and support services [7]. Backpackers tend to organise their own trips, meet local people, travel freely without a set itinerary, get involved in the culture of the host country, and decide to forgo comfort in favour of a more authentic experience [11]. It is a segment characterised by budget consciousness and a free tourism style, with most participants travelling alone or in small groups [9]. In contrast, the same authors characterise it as a sloppy, immoral, and drug-using individual [9]. The literature has distinguished backpackers from other types of tourists through objective criteria—including trip duration, budget, itinerary and activity preference—which, for the purposes of this study, we will consider the concept that defines it as an international traveller who stays in budget accommodation, with a flexible and extended travel itinerary, and who travels away from home for at least one month [12].

Backpackers have begun to be seen as a business opportunity for many destinations that decide to invest in their promotion, as they present higher returns than mass tourism, as they stay longer, spread their money over a wider geographical area, and tend to buy locally produced goods and services [5, 8, 13]. Therefore, for backpacking tourism to remain in the competitive market, managers must provide their visitors with memorable and authentic experiences [14]. Emotional processes are inherent to the construction of meaningful experiences where an emotion corresponds to a feeling state, causing physical and psychological changes that influence a person's behaviour [11, 15, 16]. Some authors argue that backpackers have higher levels of thrill-seeking than organised mass tourists and that they recall both positive and negative emotions associated with their experiences [11, 14, 16].

Emerging international tourism is often considered by tourism planners as an engine of economic, environmental, and social growth, but priority is usually given to mass tourism, ignoring the backpacking tourism subsector. Evidence of this is the fact that governments in Third World countries are very critical of backpacking tourism, preferring to develop high-input luxury tourism [9]. Moreover, research

on backpacking tourism developed in the last two decades has mainly focused on the identity and authenticity of backpackers and the positions of local communities towards this type of tourism [17]. As a result, two systematic literature reviews (SLR) were identified as worthy of attention (Table 10.1). Based on this set of findings, it appears that the domain of backpackers’ emotional experiences in the face of backpacking tourism development, to the best of our knowledge, has not yet been systematically explored. This study aims to analyse the main theoretical streams of the topic, while providing lines of future research supported by the existing literature.

This study extends previous research in several ways. First, it contributes to the tourism literature in general and backpacking tourism in particular, as it adds knowledge and understanding of how backpackers can contribute to the development of developing and developed countries. By including elements on the antecedents of backpackers’ emotions that lead to authentic experiences that can contribute to the economic, social, and environmental growth of local communities and to a competitive advantage of destinations, this research is contributing to the advancement of the theoretical field. In fact, except for a handful of studies [7, 9], few academics have explicitly studied how backpackers contribute to the development of local communities. This research presents critical evidence for the fields of tourism, entrepreneurship, strategic management, business management, technology development, and marketing. A literature-based framework for future research is presented. In practice, it contributes to tourism managers and operators as it provides key information to deliver authentic experiences that generate positive emotions which in turn lead to higher levels of satisfaction and loyalty. Destination marketing and management bodies and service providers should effectively allocate marketing and development resources by providing management strategies tailored to backpackers, considering economic, social, and environmental aspects. It is considered that this research will contribute to advancing the understanding of this field of research by providing practical implications for backpackers, tourism policymakers, tourism marketers, and tourism industry professionals.

Table 10.1 Theoretical publications on backpacking tourism

Author(s)	Year	Source	Objective	Key findings
Comerio and Strozzi	2019	Tourism economics	Analyse the relationship between tourism and economic impact, its benefits, and negative effects	Tourism is essential to reduce poverty in less developed countries through appropriate policies
Ribeiro and Costa	2017	European journal of tourism research	Present and discuss the contribution of backpacker tourism to poverty reduction	Most governments around the world continue to ignore backpacking tourism

The article, after this initial framework, is structured into four groups. The next section presents the methodology used, followed by the presentation results. Subsequently, the results are discussed and questions for future research are presented. It concludes with the limitations and contributions of the study.

10.2 Methodology and Methods

To answer the research objective, it was decided to apply a hybrid methodology that combines a systematic literature review with a bibliometric analysis using the Biblioshiny software [18] of the Bibliometrix R package [19] and the VOSviewer software [20]. The systematic review seeks to synthesise the state of the art of research [21], being a replicable, scientific, and transparent method that allows for defining the field of research. Two bibliometric techniques were used, cluster analysis and bibliographic coupling. Cluster analysis allows the identification of groups with homogeneous characteristics among the data under analysis, while bibliographic coupling allows the classification of two articles whenever they use the same reference article.

The articles were selected in the Web of Science (WoS) database in June 2022 with the keywords “backpacker tourism”, “independent tourism”, “experience”, and “emotions”, through the search equation: TOPIC (“backpack* tourism” OR “independent* tourism”) OR (tourism AND backpack*) AND experience* AND emotion*, which resulted in 94 articles. The inclusion criteria for the selection of articles were defined based on peer-reviewed articles from the categories of management, economics, sociology, sustainable green science, technology and sports and leisure hotel tourism, published in English language and not limited in time. A total of 72 articles were included in the sample and subsequently submitted to the VOSviewer software. With the technique of bibliographic coupling by documents and placing as a minimum two citations, the sample was reduced to 55 articles—this means that all documents with a few citations lower than two ($n = 17$) were excluded from the present study. In addition, two articles were eliminated because the software considered that they did not fit with the other documents, resulting in a sample of 53 articles. In the content analysis, three articles were excluded because they did not fit the field of study and did not fulfil the objective. Thus, 50 scientific studies were analysed in depth. Figure 10.1 shows the process followed by the authors—according to the Preferred Reporting Items for Systematic Review and Meta-Analyses (PRISMA) criteria—to avoid biased analysis [22].

10.3 Results

Here, the bibliometric results are presented and discussed, where the 72 articles initially identified were considered, since the bibliographic coupling technique was not considered in the bibliometric analysis.

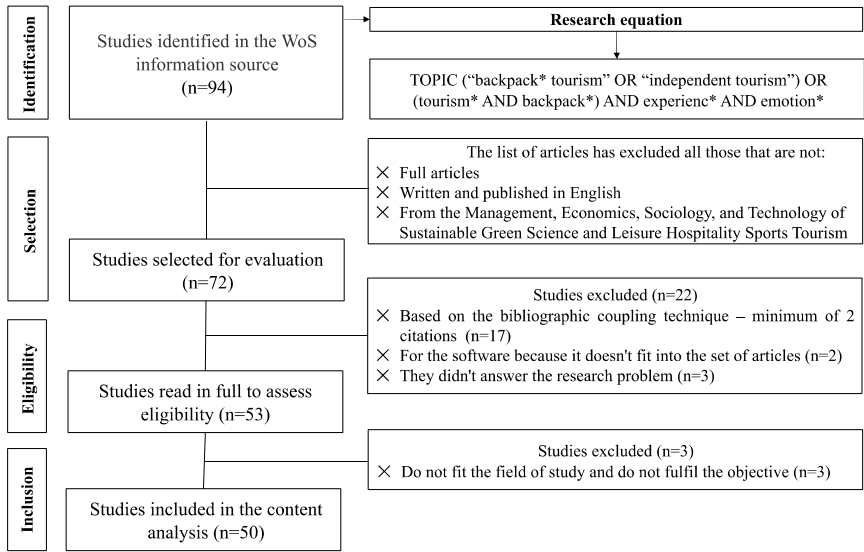


Fig. 10.1 Development of the research process according to PRISMA criteria

10.3.1 Scientific Production

The distribution of articles over allows us to conclude that the first study to include the concept “backpacking tourism” associated with “experience” and “emotion” appeared in 1998 with an increase in contributions from 2010 onwards (Fig. 10.2). However, since 2019, there has been a decline in publications. Since 2019, there has been a decrease in publications, but still, articles published in the last decade (2012–2022) represent 69.44% of the total. Geographically, China ($n = 42$), Australia ($n = 26$), USA ($n = 25$), and UK ($n = 22$) were the main stages of publications in the field of backpacking tourism. This means that one of the factors influencing the geographical distribution of backpacking studies is that the tendency to do research is generally in more popular destinations for backpackers, such as Australia. These patterns reflect theoretical and empirical contributions to this research field.

10.3.2 Main Sources

Table 10.2 presents the five most cited journals, which have as main themes: management, tourism, travel, and sustainability. The journal “Annals of Tourism Research” was the one that published the most in this research field, translating into 22% of the publications ($n = 16$) with remarkable evidence of citations ($n = 778$). The journal “Tourism Management” appears next, with 238 citations and six articles in

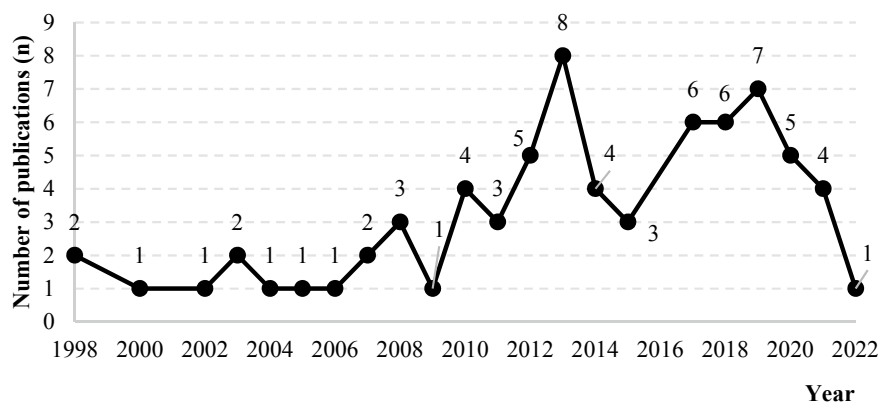


Fig. 10.2 Development of the research process

Table 10.2 Top-5 most cited journals from the initial database

Sources	Citations (n)	Publications (n)	Impact factor	Ranking (AJG)
Annals of tourism research	778	16	9.011	4
Tourism management	238	6	10.967	4
Journal of travel research	97	4	10.982	4
Sustainability	70	3	3.659	
Journal of sustainable tourism	43	6	7.968	3

the sample. The “Journal of Travel Research”, in third position, obtained 97 citations (4 publications).

10.3.3 Evolution of the Theme

Figure 10.3 represents the diagram of thematic evolution over four previously segmented periods. The “nodes” represent a cluster and the edges reproduce the path of the temporal evolution, resulting from the co-occurrence of the keywords between the periods. From this analysis, it can be concluded that during 1998–2009, the research topic focused exclusively on “backpacking tourism”, while during 2010–2013, it centred on the issue of culture in the context of backpacking tourism. The period 2014–2017 was marked by the study of the construction of the identity of backpackers. In 2018–2019, it was observed that the theme aroused interest in the authenticity of backpackers. Backpacker satisfaction is currently a trend among researchers. Therefore, studying the emotional experiences of backpackers is in line

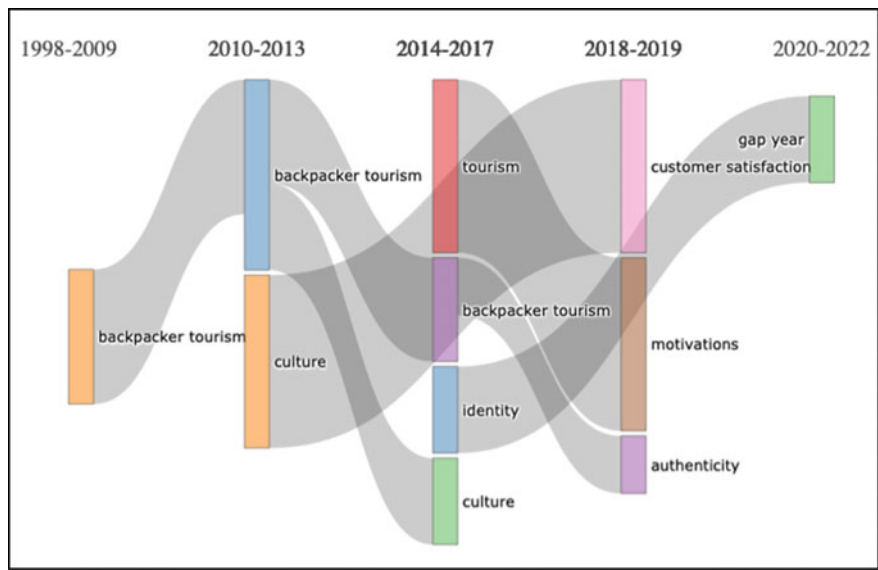


Fig. 10.3 Evolution of the theme

with the trend, because then is it possible to know and draw strategic lines that enhance their satisfaction.

10.4 Content Analysis

10.4.1 Cluster Trends

To present the points of view on the subject, it was decided to work on the bibliographic conjunctions of the 50 articles that constitute the final sample. The coupling, using the VOSviewer software, resulted in four clusters aggregating 1,045 links (Fig. 10.4).

10.4.2 Description of the Clusters

The articles were analysed to see if they matched the research objective. This analysis identified points of similarity and divergence, which were then subdivided into different research categories. The published articles showed that there is no balance

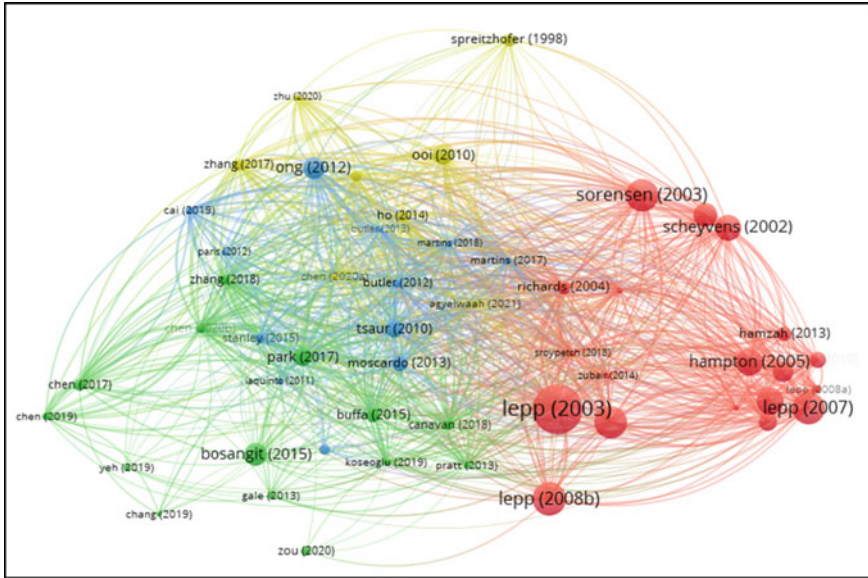


Fig. 10.4 Cluster network

between conceptual and empirical studies, with 98% being empirical (72% qualitative) and 2% theoretical. In view of this observation, a systematic review is once again justified.

Cluster 1: Backpacking Tourism in the Local Community. This group includes seventeen articles (1998–2021), focusing on the impacts of backpacking tourism on local communities. Tourism has emerged as a way to boost the economic growth of countries due to its positive influence on the economy [2]. Backpacking tourism balances the needs of local economic development with the interest of building international tourism infrastructure [7]. Pre-tourism economic activities and a successful entrepreneurial culture are key for local actors to engage profitably in emerging tourism opportunities [23]. The need for local people to be involved also conveys confidence that heritage sites can generate economic and social benefits for local host communities [6, 24]. Therefore, planners and decision-makers should recognise the legitimate existence of small businesses and the informal sector in the development plans of regions, as an appropriate strategy at the local level can contribute to increasing economic development, distributing tourism revenue throughout the region, and transforming local communities into tourism stakeholders [1, 24]. In this sense, there are strategies that can be used to develop tourism in a way that is more suitable for local communities, such as encouraging the use of local materials, targeting backpackers, integrating tourism with local agriculture, using tourism revenues for community development, in addition to government stimuli [3, 4, 6]. Local investments have a positive impact on the local economy as communities can provide services/products sought by backpackers without the need for large amounts

of initial capital or sophisticated infrastructure [9]. However, the relationship between tourism and local development should not be limited to economic criteria, but the existence of social and environmental benefits for the communities that serve backpackers should also be advocated [13]. In this case, backpackers have the perception that their activities generate adverse environmental impacts, more intense than those perceived by the local community [12]. Socially, knowledge, financial, and social power relations influence the development of tourism in the local community, but despite being exposed to the gaze of the local community, backpackers' control most of their relationships with locals [25, 26]. However, if tourists seek familiarity, the level of risk associated with international tourism is higher than that of novelty seekers [27]—travel style and tourist activities are linked to the emotion indicator [11]. Finally, the experience of backpackers can influence future demand and consumption patterns, such as the choice of destinations to visit in the future [10, 28].

Cluster 2: Antecedents of Backpackers' Emotions. This thematic group consists of fourteen articles (2013–2020), on the factors that determine the emotional experiences of backpackers [17]. First, destination marketers, to attract international backpackers, need to modify the vision of the destination (e.g., unique cultures), as this can influence backpackers' personal development, including emotions, self-awareness, and skills [16]. In turn, the dimensions of ability and emotion play a significant role in behaviour of backpackers, so activities that promote emotional relationships and improve their abilities should be developed—such as exciting and challenging sports activities, calming attractions, and volunteering experiences [29]. Geographical knowledge is also an antecedent of backpacker satisfaction, shown to impact backpackers' psychological and behavioural outcomes [30, 31]. Moreover, expected and experienced safety is a key determinant of backpackers' travel decisions and their authentic experiences, and it is therefore recommended that they be provided with adequate information on the safety of destinations through various communication channels [32, 33]. In fact, communication and promotion strategies help to build the image of a destination by associating consumption with aspects such as culture and authentic interactions [34]. Focusing on social and sustainability contributions to local communities can also be one of the advantages to improve the backpackers' experience [35, 36]. The importance of the Internet as a source of information for young backpackers, and for their environmental attitudes and green beliefs, is emphasised [37]. Travel blogs have opened a new opportunity to assess the reflective phase of the consumption experience and identify the types and qualities of experience that are chosen, showing the processes through which backpackers attribute personality [15]. Backpackers tend to remember more what they experienced and not what they saw [14]. However, for backpackers to make the most of online travel communities to have successful experiences, they need to be able to use the tool correctly [38].

Cluster 3: Dominant Factors of Backpackers' Experiences. This thematic group includes eleven articles (2010–2019), regarding dominant aspects of the backpackers' experience. Mobility is related to the sustainability of tourism, with personal transportation offering backpackers alternative sensory experiences compared to

public transport, while independent travel is considerably more important than destinations visited [39]. This means that the backpackers' experience also results from the use of certain means of transportation, with public transport being considered the most rigid and inflexible means. Gastronomy and the sensations related to it are one of those responsible for building the backpackers' experience, as some of them wish to consume unknown and authentic food as a stimulating part of the adventure [40]. For accommodation, the authenticity of the backpackers' experience is associated with its location and staff, proving to be essential both for a satisfactory level of experience during the stay and for the promotion of a positive eWOM [41]. Hostels are identified as places of leisure and recreation chosen by backpackers, but it has been realised that they are also platforms that trigger experiences of disappointment, frustration, and boredom [42].

Power relations are initially formed during the online search for travel companions, where conduct and respect for authority play a crucial role in negotiating group dynamics to achieve a satisfactory set of experiences [43]. Backpackers' constant interaction while travelling creates a situation where experiences are shared with multiple networks, making them able to portray, construct, and reconstruct their trips as they experience them [44, 45]. While travelling, backpackers demonstrate a range of emotions as they build memories of their experiences—often writing about sacred moments, inspiring people, personal pride, fear, disappointment, upset, and depression in backpacker blogs [8, 46]. Therefore, knowing the objectives and characteristics of the backpacking trip can make it safer and more peaceful, helping backpackers to assess whether they can participate in this type of trip [47].

Cluster 4: Attributes of Backpackers. This group includes eight articles from 1998 to 2021 on the evolution and main characteristics of backpackers. Backpackers should also be referred to as tourists, as their influence on society proves to be more prolonged than that of organised and selective tourists [48]. Backpackers consider themselves the elite of tourists, as they have richer experiences and more valuable qualities than other tourists [49]. They see their travels as a way to experience a new sense of self and to achieve autonomy, freedom, and independence [50]. For example, interest in backpacking tourism usually results from motivations such as life change, the achievement of personal goals, and/or rebuilding oneself before the affirmation of a professional career or after the termination of a job contract [51]. With globalisation, backpacking tourism and its forms of relationships will continue to be an important tourism phenomenon, with roots in different types of economies and societies [52]. The arrival of backpackers, while having a limited impact on existing tourism services, plays a significant role in encouraging new and unique forms of entrepreneurship [53]. From the three-component attitude model—which considers attitude as a complex relationship between cognition (backpacker motivation and perceived backpacker impacts), actions (sustainable and unsustainable backpacker behaviour) and affect (backpacker satisfaction)—it was concluded that while motivations and backpackers' perceived positive impacts influence sustainable behaviours, only their motivation is a predictor of unsustainable behaviours [5]. In this market, there is a potential to create specific tourism products that can also encourage more sustainable tourism experiences [54].

10.5 Discussion and Future Research Questions

Backpacking tourism has developed significantly in recent times, so understanding the nature and status of this development is important for creating efficient policy and market strategies. This rapid development has helped to moderate some of the excesses of international mass tourism and to mitigate criticism of negative environmental, cultural, and social effects associated with backpacking [7, 54]. However, the small volume of backpackers compared to the conventional mass tourist cannot be expected to replace the latter. The literature provides a convincing theoretical explanation that backpacking tourism can lead to economic improvement but offers little insight into how backpackers' experiences can be the key to successful progress. Thus, this research decided to take that path, seeking to identify the themes that guide backpackers' experiences as a function of backpacking tourism development. Through a SLR was classified into four thematic groups: backpacking tourism in the local community; antecedents of backpackers' emotions; dominant factors of backpackers' experience and backpackers' attributes.

The literature review revealed that, unlike mass tourists, backpackers seek Third World destinations, staying longer in each destination, seeking adventure in a different environment, authenticity, and real encounters with residents [9, 25, 47]. The term backpacker is therefore much more than a category of tourists but also a social identity with its unique group culture and values [31]. This category of tourists has developed rapidly and is proving to be a significant economic contributor to local regions, as backpackers tend to seek locally produced goods/services and accommodation run by local households [9]. Indeed, even if it is smaller-scale tourism, it contributes to the creation of employment opportunities, including supporting local restaurants and accommodation facilities, which leads to greater self-fulfilment and self-determination of small communities which depend on tourism. Its social, political, and environmental contribution to local communities was also evident [4, 6, 12, 13, 24]. Regarding environmental impacts, backpackers have been found to control how they consume resources through a desire to spend less, leading to a lighter footprint on the environment compared to more consumerist mass tourists [5, 9, 17]. While there are exceptions to this generality, what needs to be underlined is that backpackers are worth more to the local economy than they are generally given credit for.

This research also found that backpackers who collect information about local travel and the environment before travelling to gain more geographical knowledge tend to achieve higher levels of emotions [30]. Thus, it is suggested that backpackers, during their trip, seek out local tourist service centres and tourism websites to improve their geographical knowledge about travel. Another pertinent finding is that the literature reports that backpackers before the trip tend to remember more the excitement of experiencing sociocultural differences and travelling in a unique and meaningful experience, while after the trip they remember more the unexpected personal experiences than what they planned to do or lived [14].

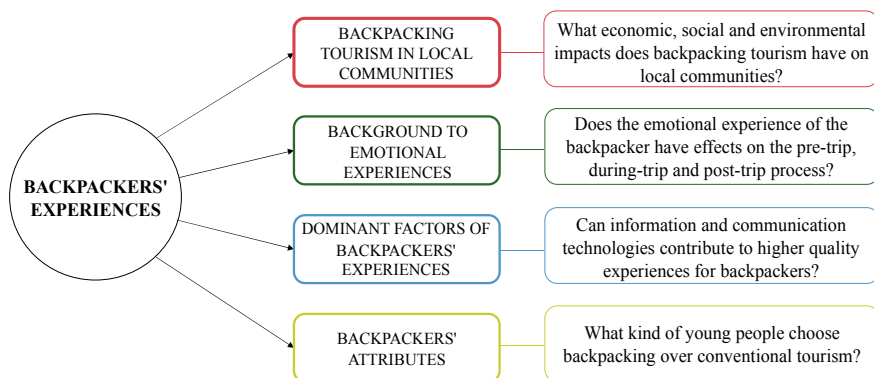


Fig. 10.5 Reference framework for analysing the backpacking tourism subsector

Given the growing importance of the backpacker market and its impact on society, the environment, and the economy, more research is needed in this scientific field. Thus, it was decided to present in a structured way the main themes identified in the literature on the experiences of backpackers in relation to the development of backpacking tourism, suggesting questions for future research by thematic groups (Fig. 10.5).

Future studies should seek to use an objectivist or theoretical approach, based on the research questions outlined above, to fill the gaps identified in the literature and advance the field of research. Researchers in this field should also study backpackers' emotions—through qualitative or quantitative methods—by developing a measurement scale that will help future research to analyse its impacts on backpackers' demand, motivations, and satisfaction. The systematic review also found that the economic, social, and environmental effects of this segment are a little-studied topic and that quantitative data collected and analysed by statistical bodies on backpacking tourism are unknown. Therefore, quantitative studies should be carried out, prioritising the development of an economic, environmental, and social impact estimation model that objectively shows the benefits of this tourism segment on various indicators, namely (Table 10.3):

10.6 Conclusions and Limitations

Backpacking has become an important trend in modern tourism, starting to gain popularity among young people in developed and developing countries. Following this trend, the term “backpacker” has been used in academia, despite the lack of consensus among researchers on its true meaning. However, despite the relevance of backpacking tourism for the development of countries and local communities, a quantitative analysis of the articles published in WoS allowed us to conclude that

Table 10.3 Economic, environmental, and social indicators

Impacts of backpackers	Indicators
Economic	→ Balance of payments;
	→ State revenues;
	→ Increase in income;
	→ Overall profitability;
	→ Gross value added; among others
Environmental	→ Corporate social responsibility;
	→ Amount of water consumed;
	→ Carbon footprint;
	→ CO ₂ emissions during transportation; among others
Social	→ Community support programs;
	→ Jobs created;
	→ Degree of satisfaction of the local community; among others

its scientific production has been decreasing—23 articles were published in 2018–2022 (Fig. 10.2). Among these publications, it was found that research has not kept pace with the development of backpacking tourism and that the emotional experiences of backpackers have been ignored by the scientific community. As such, this research aimed to identify the main themes involving the emotional experiences of backpackers in the face of the development of backpacking tourism. To this end, a systematic review was developed that identified four thematic groups and pointed out timely lines for future research.

In the qualitative analysis through the bibliographic grouping, it was understood that backpackers seek authentic experiences, travel to remote places, and spend significant periods on the road, in which they share mental maps of tourist destinations with other backpackers, between trips. As such, they should have a positive attitude towards themselves, which is reflected in their perception of their impact on the destination and subsequently influences their behaviour and emotional evaluation of the trip. Furthermore, it has been found that, by its very nature, backpacking tourism results in higher expenditures at the local level, whereas the more structured nature of package travel is known to limit contacts with the local population. A discussion on some social and environmental benefits for the communities hosting backpackers was also identified, realising that these depend on the attitudes, emotions, and behaviours of the backpackers themselves. Their engagement in sustainable behaviour is an antecedent of their satisfaction, suggesting that destination management organisations seek to focus on marketing services and recreational activities that encourage backpackers to behave sustainably.

From the bibliometric results, it was observed that the research field evolved in the decade from 2009 to 2019, even if tenuously and with several oscillations, but in recent years, it has been decreasing more and more. It is concluded that, despite the path already travelled, the field is still in the construction phase, not

least because a significant segment still adopts only empirical methodologies. The thematic evolution map provided promising information for researchers in the field of backpacking tourism, showing what has already been analysed by academics and the relevance of each of the topics addressed, as well as trends and ways forward. This analysis allowed to discover that the analysis of backpackers' satisfaction can advance the scientific field.

This research presents clear evidence on the potential benefits that backpackers can bring in terms of promoting local development, presenting relevant findings for policymakers, researchers, and stakeholders seeking to identify economic, social, and environmental opportunities resulting from backpacking tourism in developed and developing countries. Based on the knowledge domains identified and discussed in this research study, tourism practitioners are expected to be able to formulate and guide policies for the development and management of backpacker-oriented destinations. Governments and non-governmental or private sector organisations should avoid the temptation to focus exclusively on luxury tourists and consider strategies to encourage and support backpacking tourism, for example, by providing information, investment capital, networking opportunities, and capacity building through training.

This study encountered some limitations, mainly due to its qualitative nature. The first refers to the data collection process, as it was limited to the WoS database, not allowing other relevant information to integrate into this study. Another limitation refers to the selection process, which privileged only full-length articles published in English to prevent knowledge loss, excluding books and conference papers. The terms used in the search are inevitably a limitation, as studies related to the topic but using different keywords were omitted from the research. Even more, studies that are recent may not have been included because the terms under study are underexplored. These limitations form a starting point for future research studies.

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Chapter 11

Importance–Performance Analysis of Oleotourism Experience



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Abstract The continuous evolution of tourism, driven by societal changes, has given it a significant role in developing regions, particularly in poor areas. Among the various tourism segments, oleotourism stands out as it offers diverse and immersive experiences encompassing gastronomic, rural, industrial, and cultural aspects. Given its relevance for promoting culture and rural tourism, this study aimed to establish a correlation between the importance and performance of the oleotourism experience, specifically focusing on tourism activities in the *Terras Trás-os-Montes* region. To achieve this research objective, a comprehensive survey was conducted in English and Portuguese, targeting a broad audience to identify and segment individuals interested in and seeking activities related to olive culture. The study's primary goal was to analyse the motivating factors influencing tourists' choices of oleotourism destinations. 116 responses were obtained, with 103 collected in Portuguese and 13 from English surveys. Understanding the preferences and needs of the target audience becomes paramount for tourism stakeholders as they seek to create personalised offerings that enhance overall customer satisfaction. In this context, the Importance-Satisfaction Analysis (ISA) matrix is a valuable tool, complementing this understanding by identifying specific areas in the destination's offerings that require improvement and highlighting its existing strengths. By adopting a continuous evaluation approach facilitated by the ISA matrix, tourism stakeholders can proactively respond to evolving trends, maintain a competitive edge, and cultivate a thriving

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and appealing oleotourism destination. This research contributes valuable insights to destination managers and policymakers.

11.1 Introduction

The evolution of tourism, influenced by societal changes, has led to its significant role in regional development, particularly in poor areas. Rural tourism has seen increased demand due to tourists seeking authentic experiences connecting with nature and agricultural activities [1, 2]. Oleotourism, a recent segment combining tourism and agriculture, has emerged in Mediterranean countries and is gaining prominence in other regions. This form of tourism related to olive culture contributes to regional profitability and ensures sustainable development. Oleotourism offers diverse experiences, encompassing gastronomic, rural, industrial, and cultural tourism [3, 4].

It engages participants through visits to mills, olive oil tastings, and interactions with local traditions. Modern tourists seek immersive experiences, and oleotourism provides a unique tool for profound engagement with cultural heritage and traditions. It has shown the potential to generate wealth for specific areas. Furthermore, oleotourism offers opportunities for socialisation, purchasing, and acquiring knowledge about olive oil varieties, making it an experiential and participatory form of tourism [5, 6].

Based on the relevance of oleotourism for the culture and rural nature of tourism, this study sought to establish a correlation between the importance and performance of the oleotourism experience, focusing on the tourism activity in the region of *Terras Trás-os-Montes* (TTM).

To achieve this objective, surveys were conducted in English and Portuguese, targeting the public to identify and segment those interested in and seeking activities related to olive culture. The primary goal was to analyse the motivating factors influencing the choice of oleotourism destination. The research obtained a sample of 116 responses, with 103 coming from the Portuguese and 13 from the English surveys.

In conclusion, analysing sociodemographic and professional profiles, motivations, and experiences of oleotourism participants offers valuable insights for destination managers and policymakers. Understanding the preferences and needs of the target audience allows stakeholders to create personalised offerings that enhance customer satisfaction. The ISA matrix complements this understanding by identifying areas for improvement and strengths in the destination's offerings. By adopting continuous evaluation, tourism stakeholders can stay ahead of evolving trends and maintain a successful and appealing oleotourism destination in the TTM region.

11.2 Framework

The concept of tourism has evolved, acquiring characteristics as society faces political and social changes [7]. Tourism activity plays a significant role in regional development, as a positive change agent for regions lacking other economic growth opportunities [8].

The changes surrounding the tourism concept have not only affected the role of those engaged in this activity but have also influenced and enhanced tourist destinations. Tourism has developed as a strategic tool to drive sustainable growth in regions, particularly those considered poor. Rural tourism has witnessed an increase in demand due to the growing interest of tourists in connecting with nature and participating in authentic experiences where agricultural activities are perceived as leisure pursuits [1].

Oleotourism is a relatively recent segment that combines tourism activities with agricultural practices and is predominantly found in countries along the Mediterranean region, such as Spain, Greece, Turkey, Italy, Morocco, and Portugal. However, it is also gaining prominence in countries like Australia, the USA, Argentina, and Japan [3].

Tourism related to the olive culture, with its specific characteristics, not only contributes to the profitability of a particular region but also ensures sustainable development. Olive landscapes and their diversity are fundamental to the development of oleotourism, and all activities related to these variables contribute to job creation and population retention, resulting in rural development [4]. Rural development encompasses economic growth and social evolution, ensuring the preservation of territorial identity and associated cultural heritage [2].

Despite being a recent concept, oleotourism has demonstrated its potential to generate wealth for a specific geographic area. For instance, in 2020, Italy included oleotourism in its state budget, regulating it as a sector of wine tourism. This regulation encompasses the cultivation of olive trees, the olive oil production process, commercialisation, and tasting, as well as all activities related to visits to mills and olive groves, involving recreational and informative actions [9].

The literature has approached oleotourism from various perspectives, examining demand and supply, revising concepts, studying its potential impact on rural development, and categorising this segment within more established tourism typologies, despite lacking an official framework [10].

Like wine tourism, oleotourism can be associated with several categories, such as gastronomic tourism, rural tourism, industrial tourism, agrotourism, and even cultural tourism, as it encompasses all other typologies in which oleotourism can be classified [2, 4, 10–13]. Some authors also highlight the possibility of analysing oleotourism in the context of creative tourism, as its essence involves participation in tourism experiences that generate memories through immersion in local traditions and culture, making it an interactive, participatory, and experiential form of tourism [14].

The product or service is offered in the market and captures consumer attention due to its inherent potential for satisfaction, arousing the desire to purchase [15]. In the context of oleotourism, the product revolves around olive oil and the experiences that can be enhanced through it.

The term “experience” can be used in various contexts. It can describe knowledge acquired over time that shapes behaviour, or it can refer to something perceived in the present moment, evoking emotional involvement and the creation of memories, whether positive or negative [16]. In tourism, experiences are linked to emotions, preconceived ideas, and the confrontation with perception, influencing consumer behaviour. Personal experiences, although shared with others, generate memories [17].

Tourism is a sector that creates experiences, and various disciplines have studied this phenomenon over time. For example, from the social sciences perspective, it is interesting to study and understand the behaviour of tourists seeking an escape from their routine, analysing the intense feeling of happiness, the culminating experience, and self-realisation. From a marketing perspective, it is important to comprehend the consumption behaviour of the tourism experience, considering its subjectivity [18].

Indeed, modern tourists are no longer satisfied with merely observing the places they visit or acquiring superficial knowledge. They desire to go beyond what they can observe, aiming to become protagonists of their travel experiences [19]. In this regard, olive and oleotourism can be an extraordinary tool, allowing participants to obtain memorable experiences through deep engagement with local traditions and culture.

This engagement can be achieved through various experiences provided by oleo-tourism, including visits to mills, olive oil tastings, visits to olive oil museums and interpretive centres, participation in fairs and events related to the theme, and involvement in tours that explore olive groves, offering opportunities to participate in the olive harvesting process, among others [2, 4, 11, 14].

The most widely accepted definition of an oleo tourist is someone who travels outside their residential area to learn about and personally experience the olive oil production process, from olive picking to pressing at the mill and participating in educational olive oil tastings. The authors highlight similarities between the practitioners of this typology and wine tourists, as they share an obvious interest in agri-food products. However, the text suggests other similarities, such as the desire to obtain memorable experiences through immersion in local culture, which adds value to the practitioners and contributes to the sustainability and development of the host territory [20].

Tourists in gastronomy-related segments not only seek immersion in local culture but are also driven by the experience itself, the pleasure of tasting and savouring, and the awakening of the senses. They are motivated by enjoying the rural environment, the need for socialisation, the opportunity to make purchases, and the knowledge acquired regarding olive oil varieties [6].

11.3 Methodology and Methods

In science, a methodological procedure is an entire process aimed at understanding and interpreting reality, intervening in it, and guided by formulated problems supported by appropriate rules and actions for knowledge construction. As a starting point, all investigations involve a problem, whether formally explicit or not [21].

From this perspective, this study aimed to analyse the motivating factors that lead to the choice of oleotourism destinations in the TTM region, through the relationship between importance and performance of the oleotourism experience.

Surveys are extensively employed instruments in research and data gathering, particularly in studies of a quantitative nature. They are purposefully crafted to acquire information and opinions from participants through standardised inquiries. The survey methodologies may diverge based on the research objectives, the nature of the questions, and the target audience [22]. Surveys encompass various questions, including closed-ended questions (featuring predetermined response options) and open-ended questions (allowing participants to express their responses freely). Closed-ended questions serve as valuable tools for quantitative analysis, whereas open-ended questions offer more comprehensive and qualitative insights [23].

In this perspective, surveys were conducted among the general population to gather information on the factors influencing the choice of oleotourism destinations in the region. Survey research is a type of investigation conducted to obtain data or information about the characteristics or opinions of a group of people who are selected, in statistical terms, as representative of a population [24].

In research, a sample refers to a subset of individuals or elements selected from a larger population. Selecting a sample is crucial as it determines the representativeness and generalizability of the study's findings to the entire population [25]. The study sample sought to reach a broad population segment by disseminating the questionnaire among groups associated with olive culture on various social media platforms, such as Facebook, Instagram, and LinkedIn, and sharing it with relevant groups and associations in the field. There are various sampling techniques, and researchers choose the most appropriate one based on their research objectives, resources, and population characteristics [26]. Specifically aiming to gather a substantial number of answers, an inquiry consisting of four thematic analysis dimensions was developed in Portuguese and English. The aim was to study the motivating factors influencing the choice of oleotourism destination. 116 responses were obtained for the surveys, with 103 for the Portuguese and 13 for the English surveys.

The survey consists of 4 dimensions and 21 questions. Specifically, the first dimension sought to analyse the sociodemographic and professional profiles of the respondents. Next, the second dimension aimed to examine the practice of oleotourism and the motivations of the practitioners. The third dimension analysed the image of oleotourism as a differentiating product by evaluating the importance and agreement of a set of variables associated with the components of the tourist destination. Using a Likert scale of 5 points (1 = unfavourable; 5 = favourable), respondents were asked

to indicate the degree of importance and agreement assigned to each situation related to the practice of oleotourism experiences in the TTM region.

Finally, the last dimension sought to assess the respondents' importance, satisfaction, perceived value, and behavioural attitude, studying the degree of importance and satisfaction attributed to each statement, using a Likert scale of 5 points (1 = unfavourable; 5 = favourable). The structuring of the statements and the variables under analysis were based on the adaptation of some surveys previously used in studies of the field [27–30].

The construction of a questionnaire plays a pivotal role in surveys involving data collection through standardised questions. This process entails several meticulous steps to ensure the effectiveness of the questionnaire and the acquisition of pertinent and accurate information [31]. The research methodology employed encompassed distinct yet complementary dimensions. The questionnaire's various dimensions aimed to ascertain the participants' sociodemographic and professional profiles, the frequency of engagement in oleotourism activities, the motivations driving their involvement in oleotourism, and their perception of oleotourism as a distinct product, with a comparison of importance and satisfaction scales. The dimensions of analysis resorted to the use of Likert-type scales to analyse the statements [32].

The Importance-Performance Analysis (IPA) is a widely used technique in marketing and research to assess the relative importance of different attributes or factors and their corresponding performance levels. The main objective of IPA is to identify areas that require improvement or prioritisation based on respondents' perceived importance and satisfaction levels. In an IPA, respondents are typically asked to rate the importance of various attributes or factors and their satisfaction with each attribute's current performance. The results are then plotted on a graph, with the importance of each attribute represented on the vertical axis and the satisfaction level on the horizontal axis [33–35].

Subsequently, a qualitative analysis was conducted, encouraged by descriptive and quantitative analyses employing specific statistical tests, such as IPA. In this case, the IPA will be transformed into an Importance-Satisfaction Analysis (ISA), where respondents are asked to rank the importance of different attributes or factors and their level of satisfaction with each attribute. The results are then presented in a graph, with the importance of each attribute represented on the vertical axis and the level of satisfaction on the horizontal axis [34, 35].

The Importance-Satisfaction Matrix (ISM) is a strategic management tool utilised to guide performance improvement actions based on opinions [34]. This matrix enables a straightforward evaluation of participant satisfaction and importance in oleotourism activities by analysing specific variables.

The ISM facilitates the identification of attributes positioned in different quadrants, directing attention and priority toward specific characteristics and strategies. Specifically, in Quadrant I, areas of concern are highlighted where attributes are considered highly important but fall below average regarding satisfaction. Quadrant II encompasses strong points, representing attributes of high importance with which customers are fully satisfied. Quadrant III includes weak points with low importance and satisfaction levels. Quadrant IV includes attributes with low importance but

high satisfaction levels, suggesting that resources are misallocated and indicating the need for effective reallocation. Interpreting the results allows for identifying aspects requiring more attention and those currently in a satisfactory state.

This instrument proves highly advantageous and straightforward in application, providing essential information for public and private organisations managing services and products. The ISM empowers decision-makers to reflect on and delineate effective strategies tailored to each service or product offering.

11.4 Results

11.4.1 Oleotourism Sociodemographic and Professional Profiles

Regarding the sociodemographic and professional profile of the analysed sample, it was observed that out of the 116 respondents, 63% fell within the age group of 30–59 years, 33% were between 18 and 29 years old, and 4% were age range of 70–79 years. As for gender, most respondents were female, constituting 65% of the sample. Regarding nationality and residence, the sample consisted of 76% Portuguese respondents, predominantly from the regions of TTM and Minho. The remaining 24% represented diverse nationalities, with 14% being Brazilian, 5% British, and 2% each representing French and Croatian, while Vietnamese and Spanish constituted 1% each.

Considering educational qualifications, a significant majority of 97% indicated having obtained higher education, with 66% employed by others. Notably, 30% of the respondents identified themselves as students, and 5% as self-employed.

Finally, concerning monthly income, it was observed that over half (56%) reported earning a gross monthly income ranging between €706–1410, while 16% fell in the income range of €1411–2115, and 13% fell within the bracket of €2821–3525.

11.4.2 Oleotourism Experience and the Motivations Driving Their Involvement

In analysing the practice of oleotourism activities, the aim was to understand whether the respondents had previously engaged in such activities and, if not, the reasons behind their non-participation and whether they would be motivated to participate.

Specifically, a filter was introduced in the initial phase to ascertain whether the respondents had participated in oleotourism experiences. In the affirmative case, they answered the subsequent questions justifying their non-participation if the answer was negative. The findings revealed that 67% of the respondents had already taken part in activities associated with olive culture.

Considering that the questionnaire was disseminated among individuals associated with olive culture, the study sought to comprehend the justifications for the non-participation in such activities. Notably, among the 33% of respondents who stated that they had never engaged in activities related to olive culture, 43% claimed a lack of awareness about such activities. Another perspective indicated that 24% expressed a lack of interest, while 32% sought alternative activities.

When asked about their interest in pursuing such activities in the future, respondents were requested to rate on a scale of 0 to 10, with 0 representing “never” and 10 representing “always”. The average response was 5.7 points (± 3.15).

The following dimensions of analysis were conducted with the 78 respondents (67%) who reported having participated in oleotourism experiences. Regarding the motivation for engaging in oleotourism, it was found that 62% participate in these activities occasionally, 25% participate every week, and 13% annually. The prominent reasons for seeking these activities were driven by the desire to learn about olive culture (4.3 points ± 0.5), visit olive groves (4.3 points ± 0.5), explore the region (4.3 points ± 0.6), experience regional gastronomy (4.4 points ± 0.5), engage in olive oil tasting (4.6 points ± 0.5), purchase olive oil (4.3 points ± 0.5), and seek creative experiences (4.2 points ± 0.4).

The aspects that garnered the most interest in their oleotourism experiences were related to heritage concerns (3.8 points ± 0.7), a sense of immersion in the daily life of the culture (3.6 points ± 0.6), the desire and willingness to visit places associated with olive culture (3.7 points ± 0.5), curiosity to learn about the world of olive oil (3.8 points ± 0.4), interest in the region’s culture and history (3.8 points ± 0.4), the physical nature of the location (3.7 points ± 0.5), the quality of products (3.8 points ± 0.8), and finally, the interest in experiencing oleotourism to have a new, different, and unique experience (3.8 points ± 0.4).

Finally, within this dimension of analysis, an examination was conducted to understand whether these types of activities had been experienced in the TTM region. Specifically, it was ascertained that 82% of respondents acknowledged that their experiences thus far had taken place in this region. In comparison, the remaining 17% responded that although their experiences were not in TTM, they expressed interest in trying these activities in this region.

11.4.3 Importance-Satisfaction Descriptive Analysis

The Importance-Satisfaction Analysis (ISA) matrix is a valuable tool for continuous evaluation and enhancement. Analysing various time intervals or among diverse customer segments can offer valuable insights into evolving preferences and priorities [38]. Like the Importance-Satisfaction Matrix, the ISA matrix evaluates customer satisfaction concerning various attributes or factors associated with a product or service.

Within these parameters, this study analyses an ISA matrix, which examines the importance and satisfaction levels of 12 study variables related to the destinations of TTM in association with oleotourism (Fig. 11.1). Specifically, the variables analysed are: accessibility; mobility; infrastructures; cleaning; quality of service; diversity; quality vs price; new culture; rural experience; landscape; gastronomy; and endogenous products.

Based on Fig. 11.1, it is possible to note that all quadrants contain variables, with some exhibiting more positive assessments while others displaying negative ones. Notably, the variables of diversity, mobility, and accessibility were identified as having lower satisfaction and importance levels. This may indicate the lack of accessibility to olive oil mills and groves.

On the other hand, the rural experience component showed higher satisfaction but lower importance. The variables of quality vs price and quality of service exhibited high importance levels but were associated with lower satisfaction, suggesting that improvements and developments in these areas are needed.

Many of the variables fall into the quadrant where both importance and satisfaction levels are high. Specifically, the new culture, gastronomy, endogenous products,

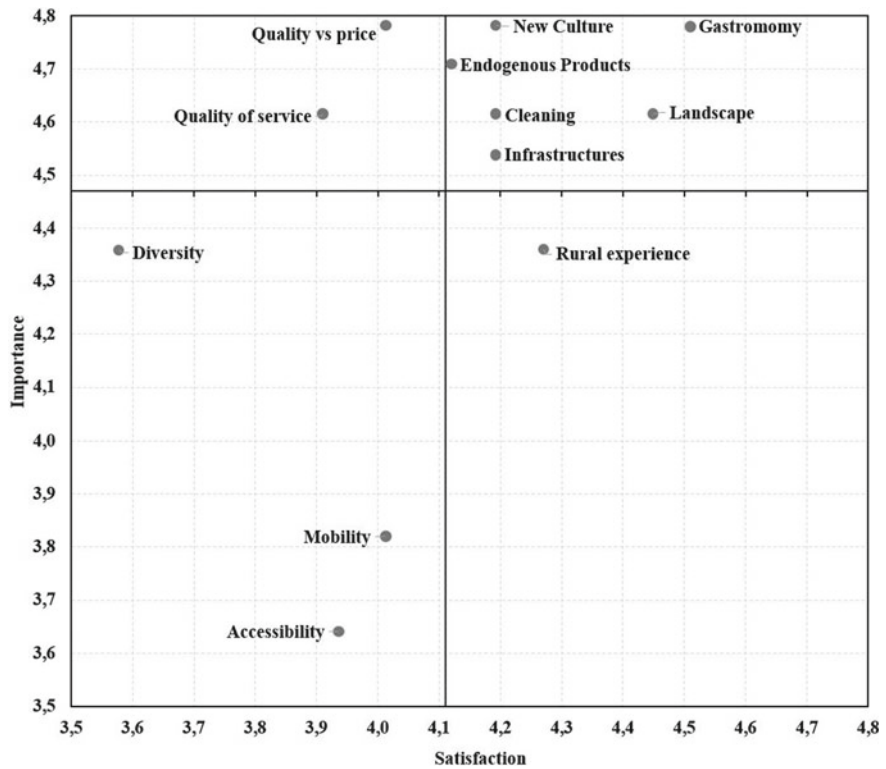


Fig. 11.1 ISA matrix

cleaning, landscape, and infrastructures are classified as variables that generate higher satisfaction and demonstrate greater importance for the oleotourism destination.

This analysis provides valuable insights into the aspects that require attention and improvement to enhance the overall oleotourism experience in the TTM region. By understanding the interplay between the importance and satisfaction levels of different variables, tourism stakeholders can focus on strategic development and optimisation of the destination's offerings.

11.5 Main Findings

The findings regarding the sociodemographic and professional profiles of the sample revealed interesting insights about the participants engaged in oleotourism. Most respondents were 30–59 years old, indicating a middle-aged demographic interested in this tourism activity. Additionally, the significant presence of female respondents suggests that oleotourism appeals more to women. Notably, a considerable percentage of the sample consisted of Portuguese respondents, primarily from the regions of TTM and Minho, indicating a local interest in the destination.

The high level of educational qualifications among the respondents, with 97% having obtained higher education, implies a well-educated and informed group of participants engaging in oleotourism. The fact that many of the respondents were employed by others reflects a working population with disposable income, which could contribute to their interest in leisure activities like oleotourism.

Regarding the oleotourism experience and motivations driving involvement, it was encouraging to see that a significant portion of respondents (67%) had already participated in activities related to olive culture. This suggests a positive reception of oleotourism in the region. However, 33% of respondents who had not engaged in such activities cited a lack of awareness and interest. This highlights the importance of promoting and raising awareness about oleotourism experiences to attract a broader audience.

The motivations driving involvement in oleotourism revealed a diverse range of interests. Participants were driven to learn about olive culture, explore the region, experience regional gastronomy, and engage in creative experiences. These motivations align with the unique offerings of oleotourism, such as the opportunity to immerse in local culture and heritage. Stakeholders need to emphasise and promote these aspects to attract more participants.

The Importance-Satisfaction Analysis (ISA) matrix provided valuable insights into the perceived importance and satisfaction levels of various attributes related to oleotourism in the TTM region. The analysis revealed that while some attributes received high importance ratings, their satisfaction levels were comparatively lower. This discrepancy signals areas for improvement and development, such as enhancing the quality of service and the value for price. By addressing these issues, tourism stakeholders can increase overall customer satisfaction and retain a loyal customer base.

On the other hand, several attributes received high ratings in importance and satisfaction levels, indicating areas of strength in the oleotourism experience. The new culture, gastronomy, endogenous products, cleaning, landscape, and infrastructures were recognised as key strengths of the destination. Leveraging these attributes can enhance the destination's appeal and reputation among potential visitors.

It is worth mentioning that the ISA matrix offers a continuous evaluation and enhancement tool. By periodically reevaluating the importance and satisfaction levels of the analysed attributes, tourism stakeholders can identify changing preferences and evolving priorities among tourists. This dynamic approach allows for targeted improvements and strategic developments, ensuring the destination remains attractive and competitive in the evolving tourism market.

11.6 Conclusions

The findings of this study provide valuable insights into the motivating factors behind the choice of oleotourism destinations in the TTM region. By understanding the preferences and needs of the target audience, tourism stakeholders can enhance the overall oleotourism experience and develop strategic offerings tailored to diverse interests. The ISA matrix is a valuable tool for continuous evaluation and improvement, guiding destination managers in making informed decisions to optimise the tourist experience.

In conclusion, the sociodemographic and professional profiles of the oleotourism participants and their motivations and experiences provide valuable insights for destination managers and policymakers. By understanding the preferences and needs of the target audience, stakeholders can create tailored offerings that cater to diverse interests and maximise overall customer satisfaction. The ISA matrix complements this understanding by pinpointing areas of improvement and strengths in the destination's offerings. By employing a continuous evaluation approach, tourism stakeholders can stay ahead of evolving trends and maintain a successful and appealing oleotourism destination in the TTM region.

The development of the oleotourism offer as a new form of tourism of the TTM destination should be achieved by involving more stakeholders, creating a sense of shared participation to spread knowledge about oleotourism, and sensitising to the relevance of this business in the local context. Future work should be exercised in this direction. As a limitation, this study shows the need to increase the structured database and to establish more contacts with tourist organisations to obtain results closer to reality and to obtain as accurate a version as possible of the tourism offer of TTM.

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Chapter 12

Present and Future Digital Media Experiences to Support Travellers' Decision Process During Online Accommodation Booking: A Systematic Literature Review and Bibliometric Analysis



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Abstract One of the key driving forces in tourism concerns the accommodation provided to travellers. When planning a trip, it is common for voyagers to search for relevant information about accommodation options through websites to decide which one to book. Despite these allowing the evaluation of decisive factors, new avenues of future research in the field are linked to immersive, interactive, and sensory-filled experiences to support travellers in making their choice, provided by emerging digital media such as virtual reality. This paper offers a comprehensive understanding of this field's development, highlights existing gaps, and proposes paths for future research by systematizing different contributions of digital media to support travellers' decision process during online accommodation booking. This article provides theoretical and practical contributions to outline novel approaches to empower a new era of smart tourism that enhances travellers' experiences when searching for accommodations and increases trusting intentions. From the analysis carried out, it was concluded that academic research has only started to gain momentum since 2019 and that topics related to new media are highly relevant to the field but still on a scarce scientific development level. It was also concluded that accommodations preferentially use three technological platforms to advertise their accommodations to users, including traditional websites, mobile websites and virtual reality.

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12.1 Introduction

The tourism industry is currently among the fastest-growing economic sectors [1], expected to more than double the 2.7% estimated annual growth for the global economy between 2022 and 2032, i.e. grow at an average annual rate of 5.8%.

During the planning of a trip, travellers look for services that can fulfil their desired experiences, and one of the main challenges is finding accommodation that better suits their needs [2]. Thus, having access to as much information as possible is crucial to support their decision-making process, helping reduce doubts and uncertainties [3].

Digital media have increasingly influenced this process, and their transformative power in the tourism industry over the last few decades is well known [4]. Online booking platforms (such as Booking, Expedia, Airbnb, Trivago, or Agoda) are considered the most popular means to help tourists choose which accommodation to book [2]. However, despite these conventional media allowing users to evaluate several decisive factors, immersive, interactive, and sensory-filled experiences are advocated to support travellers' choices further [5]. Technologies such as virtual, augmented, and mixed reality are identified as having the potential to become an integral part of the communication strategy of many hotel providers, facilitating that prospective clients can live immersive, interactive, and sensory experiences in establishments before their stay, allowing them enhanced perception of these spaces and constructing more informed decisions before booking an accommodation [6].

Several authors argue that the fact that customers can access virtual experiences in ways more proximate to reality can have positive implications in managing travellers' expectations and in the satisfaction felt regarding the accommodation spaces [2–7]. Examples of potential combinations of multisensory stimuli applied in particular cases of tourism industry services include vision, hearing, touch, movement, gustatory, and olfactory suggestions, enabling the development of rich mental images [7, 8]. Although these technologies' contributions have raised a growing interest, the work carried out in this area is mainly conceptual so far [7].

This research aims to deepen the understanding of the state of the art in this field by answering the following research question: “in what ways can digital media support travellers' decision process during online accommodation booking?” Notably, it seeks to organize the scientific knowledge produced to understand new media's multiple contributions in supporting travellers' decision process during online accommodation booking concerning: (i) technologies used to communicate the accommodations; (ii) information provided; (iii) immersive, interactive, and sensory experiences offered; and (iv) factors supporting the travellers' decision process. The next section provides a brief theoretical background of the impacts of different digital media on the sector, followed by detailing the methodology, data gathering, and data analysis for conducting the research. It proceeds with the presentation and discussion of the results. The last section regards the presentation of the main conclusions and contributions introduced by this study to the field, some limitations, and suggestions for new research directions.

12.2 Theoretical Background

Innovations in the digital sphere are primarily linked to the Internet and mobile communications advancements, the emergence of robust computer systems, and the massive use of smart devices, which have led to more effective operational processes, cost reduction, improved services, and new customer experience possibilities [9]. Due to the ease of access to information, price comparison, and time convenience of online platforms, websites became preferred engines that promote clients' purchasing intentions [10]. However, although consumers look for key information during the online booking process, such as facilities, contact, and availability [11], they lack physical contact with places, sellers, and their products. Therefore, customers tend to be more suspicious in these environments and, consequently, more demanding [12].

Online trust (e-trust) is an essential issue for the sector since the accommodation industry is entirely based on the excellence of customer service to generate satisfaction and trust, which allows for sustaining long-term relationships. That said, it shows imperative why advances concerning new media have been moving towards reducing the feeling of distance between the consumer and the service provider, intending to increase trust and effective recognition [13]. Consumers have been increasingly looking for innovative digital experiences, products, and services that offer integrated and immersive environments capable of delivering real scenarios and sensations through digital means [14], allowing them to virtually experience intangible elements linked to touristic places and several related aspects [6]. As a result, virtual reality (VR) and augmented reality (AR) technologies can contribute to leveraging future directions at commercial and economic levels [6], with positive effects expected, particularly for the tourism industry. These offer new possibilities to transform the presentation and communication of hotel-related information, providing the consumer with experiences similar to reality through immersive and interactive environments in some cases [15].

Given that VR can provide a complete pictorial representation of accommodation facilities, it is expected to reduce consumers' fears inherent to their reservation processes since they can familiarize themselves with the unknown before making a final reservation decision [16]. Additionally, AR technology differentiates from VR by enabling access to additional layers of information induced by digital systems, such as images or other stimulating sensory cues, into the real-world environment [17]. In other words, AR allows users to access new information contextualized with the physical environments where they are and virtually experience and interact with them, as it creates a sense of alternative presence [15].

The metaverse, another crucial technological advancement, consists of a collective and interactive parallel reality to construct a digital universe of options, having the potential to take advantage of new perspectives capable of adapting to an ever-evolving travel environment [5]. In this way, the hospitality and tourism industry can create new scenarios for increasing and supporting the customers' travel experience, as there appears to be immense potential and a hype moment related to this implementation [14].

Through new digital media, users can interact with the environment in ways that the dividing line between the real and virtual worlds becomes invisible [15]. In contrast to traditional web platforms, the user has not only an external point of view in these virtual worlds but also becomes the centre of the presentation where the entertainment takes place. Consumers can have opportunities to make informed decisions based on sensory experiences, visual effects, innovation, and emotional appeal, allowing them enhanced access to perceived accommodation spaces before completing a final reservation [18].

12.3 Methodology

A hybrid methodology was followed to achieve the study's aims while offering an unbiased overview of existing information, combining a systematic literature review and bibliometric analysis. Firstly, an initial exploratory literature search was performed to gain a broad overview of the most common terminology linked to the issue under research. Then, the PRISMA guidelines were followed to perform the systematic literature review [19]. The analysis of the bibliometric data was performed using the Biblioshiny application from Bibliometrix R-tool [20], complemented with the VOSviewer tool [21] to construct and visualize the bibliometric networks during the screening stage of the gathered records.

The records identification took place in March of 2023 by querying the Web of Science (WoS) database using the search string: TOPIC (“technolog*” OR “online” OR “virtual”) AND (“accomodat*” OR “hotel”) AND (“booking” OR “purchase”) AND (“decis*” OR “intent*”). The number of records resulting from this identification process was 484, and none were duplicated, so no records were removed during this stage. Next, the following inclusion criteria were applied for screening the records: (i) peer-reviewed articles; (ii) published in English; (iii) from the categories of economics, hospitality leisure sport tourism, management, business, computer science information systems, computer science interdisciplinary applications, sociology, operations research management science, social sciences interdisciplinary, and computer science artificial intelligence. No time limitation was applied for screening the records. The resulting sample comprised 319 records submitted to the VOSviewer tool for creating bibliometric networks based on the bibliographic coupling by documents technique, without a minimum number of citations, which coupled 315 records into 4 clusters and excluded 4 records. Given that the network results obtained with the analytical process allowed concluding that the topic under research is relatively new and understudied, it was decided to proceed with the manual selection of the records based on their titles and abstracts. During this screening stage, 245 records were excluded, resulting in 70 reports sought for retrieval. Since it was not possible to retrieve 13 reports, 57 reports were assessed for eligibility, which encompassed their complete reading. During their reading, 45 reports were excluded for not meeting the research objectives and not responding to the research question. Finally, the study

screening included 12 reports (concerning 12 studies) as the final sample, which were analysed in depth.

12.4 Results

12.4.1 Bibliometric Analysis

During the bibliometric analysis, it was considered the 319 screened records as the sample. Descriptive statistics were produced to understand the scientific production performance over time and the primary sources associated. Additionally, the thematic evolution on the subject was studied based on the records' keywords, and the thematic map with the respective clusters was analysed.

Scientific Production. Figure 12.1 presents the yearly distribution of scientific production of the sample. The first publication on this subject was in 2004, and scientific productivity was essentially non-existent until the end of 2014 (6.3% of total contributions). The publication performance improved by 21.6% between 2015 and 2018, but it was from 2019 onwards that the volume of scientific publications started to increase on the WoS, i.e. 71.5%. Concerning 2023, it is stressed that the number of publications ($n = 11$) encompasses only records published until March. The growing interest in this scientific subject in the last four years is clearly evidenced by the gathered data, meaning that the annual growth rate of publications was 13.5%, with an average record citation of 26.

Moreover, the screened scientific production regards 831 authors from 52 countries. Its analysis revealed that China ($n = 184$) and the USA ($n = 183$) are the two countries with higher scientific production in this field, representing almost half of the global performance, i.e. 48.9%, followed by India ($n = 39$), the UK ($n = 36$), South Korea ($n = 31$), Spain ($n = 29$), and Portugal ($n = 24$). Despite the highlighted country's scientific production, it is essential to mention that the USA ($n = 2244$),

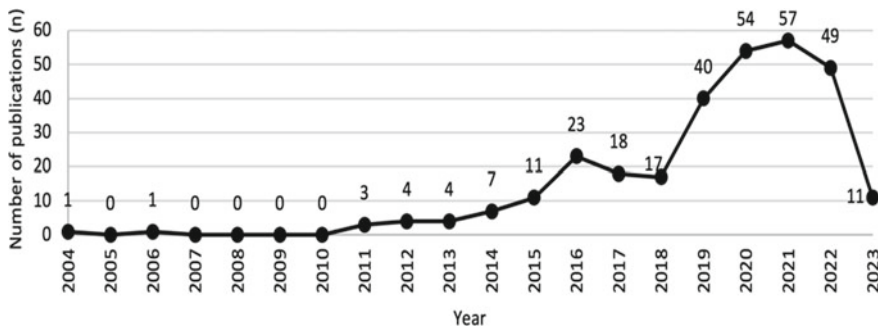


Fig. 12.1 Yearly evolution of the scientific production on digital media use during online accommodation booking

China ($n = 2074$), Australia ($n = 982$), Korea ($n = 543$), and Spain ($n = 406$) occupy the top 5 nations with most cited records at the time of this study.

Main Sources of the Screened Scientific Records. Table 12.1 organizes the ten sources with more publications in the field under analysis, the corresponding number of citations and the impact factor. Concerning the three most influential sources, The International Journal of Hospitality Management (impact factor of 11.7) is the one with both more publications ($n = 40$) and cited articles ($n = 1306$). The second most cited source is Tourism Management, with 1199 citations, although only 13 articles were published on this subject, and also the journal with the higher impact factor (12.7). The third most cited source is the International Journal of Contemporary Hospitality Management ($n = 573$), with 18 articles published in this area and an impact factor of 11.1.

Thematic Evolution. Figure 12.2 presents the thematic evolution of the field for the three timeframes previously concluded as most representatives of the distribution of scientific production. From its analysis, the four clusters in the first period inform it focused mainly on *hospitality*, *e-complaints*, *hotels*, and *advanced booking* topics. The period 2015–2018 represents a significant milestone for evolving into twelve thematic clusters linked to *ewom*, *tourism*, *online travel agency*, *hospitality*, *online booking*, *booking intention*, *purchase intentions*, *e-trust*, *hotel booking*, *hotel*, *consumer behaviour*, and *price*. During the last time period considered, a lower number of clusters can be concluded ($n = 9$), where *online reviews* represent about half of the research conducted, followed by *Airbnb*, *online booking*, *service quality*, and *hotel booking*. Moreover, four residual clusters linked to *hotels*, *experimental design*, *machine learning*, and *virtual reality* emerged during this period, highlighting the need for research focused on these themes.

Table 12.1 Top 10 of the sources with the most impact concerning the screened records

Source	Publications (n)	Citations (n)	Impact factor
Int. Journal of Hospitality Management	40	1306	11.7
Int. Journal of Contemporary Hospitality Management	18	573	11.1
Journal of Hospitality and Tourism Technology	14	8	4.7
Tourism Management	13	1199	12.7
Sustainability	13	78	3.9
Journal of Hospitality Marketing and Management	9	7	9.8
Cornell Hospitality Quarterly	7	227	3.5
Journal of Travel Research	7	321	8.9
Information Technology and Tourism	6	32	9.3
Journal of Hospitality and Tourism Research	6	28	4.2

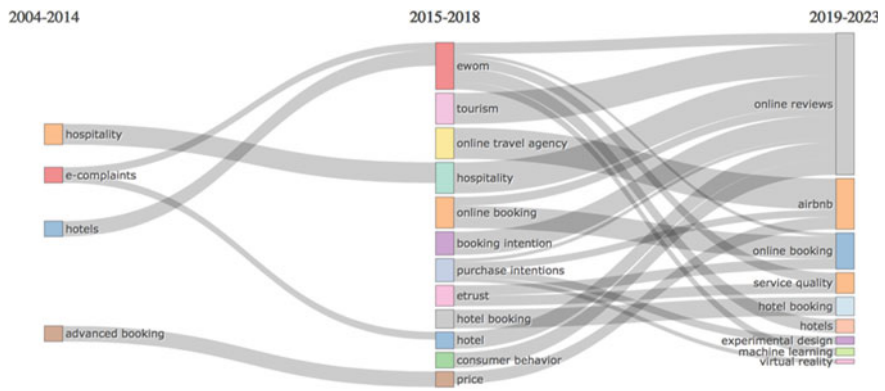


Fig. 12.2 Diagram of the thematic evolution of the screened records between 2004 and 2023

Thematic Map. The thematic map plotted using the authors' keywords from the screened documents is presented in Fig. 12.3. This strategic diagram allows the visualization of the network's architecture in terms of centrality and density of the existing research, presenting 14 clusters organized in four quadrants: motor themes, basic themes, niche themes, and emerging or declining themes. Through its analysis, it is possible to conclude that one cluster, including themes related to *risk*, *loyalty*, and *mobile booking*, represents the motor themes that have been central to this research field's progress. On the other hand, the five clusters in the upper-left quadrant present well-developed themes but with marginal relevance to the field under study. These relate, respectively, to *consumer behaviour*, *business travellers*, and *intention*; *advertising*, *expertise*, and *gender*; *ewom*, *experience* and *travel vlogs*; *hotel revenue management* and *decision support systems*; and *hotel performance*. Additionally, two clusters located in the lower-left quadrant of the figure indicate both low development and low relevance of themes, which can convey declining themes or potentially ones to turn into emerging themes for the development of this field of research. These clusters relate to *machine learning* and *online travel agents*. Finally, the lower-right quadrant of the thematic map presents six clusters with high relevance degrees to the field but which present low development, concerning essentially themes linked to: *TripAdvisor*, *Booking*, and *nationality*; *satisfaction*, *Airbnb*, and *attitude*; *online reviews*, *social media*, and *hospitality*; *online booking*, *website quality*, and *e-trust*; *virtual reality* and *mental imagery*; and *Covid-19*.

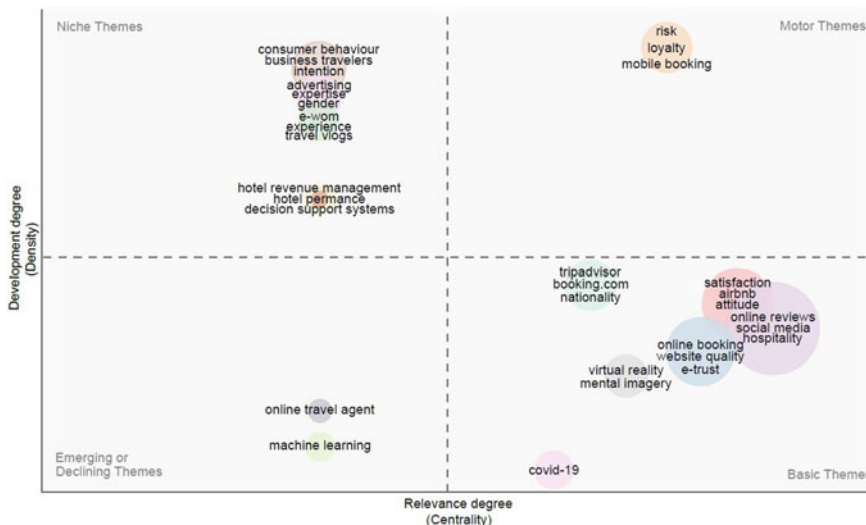


Fig. 12.3 Thematic map with the characterization of the 14 clusters resulting from the screened records

12.4.2 *Systematic Literature Review Based on Content Analysis*

Aiming to support the systematization of the results, Table 12.2 presents the main findings about the technologies used to communicate the accommodations, the primary information linked to the accommodations, and the experiences provided.

Concerning the technologies used to communicate the accommodations, 58.3% of the studies focused on websites ($n = 4$), mobile websites ($n = 2$), and both mobile and traditional websites ($n = 1$). In these cases, it was addressed the diverse effects on the customers' booking intention when providing them information through text and pictures ($n = 5$) and solely through pictures [29]. The remaining study does not provide any information about this subject. On the other hand, five studies (41.7%) used virtual reality during the accommodation booking process to provide immersive experiences in hotel rooms, hotel lobbies, restaurant rooms, and spa treatment rooms, among other facilities [3, 7, 18]. Additionally, one work [27] explored the use of VR commercials, and [28] researched the influence of providing short VR clips with tours of the accommodation.

Among the experiences enabled through using the different technologies, it is concluded that all studies focused mainly on providing visual information linked to accommodation facilities, i.e. in the form of texts, images or videos. However, research has regarded textual and pictorial visual information with haptic cues to cause haptic sensations in end users [26]. Furthermore, booking experiences on mobile and traditional websites were highlighted as interactive, and several authors studied the influence of usability, graphic design, and user experience design on

Table 12.2 Systematization of the main features of studies included in the systematic review

Authors Data source (country/region)	Technologies used	Accommodations' information	Experiences provided
Li et al. [13] China	Website	Text; pictures	Interaction with website; visual information
Tao et al. [22] China; Pakistan	Mobile website	Text; pictures	Interaction with mobile apps; visual information
Israel et al. [3] Germany	Virtual reality (VR)	360° panoramic images (e.g. lobby, restaurant, room, beach of the hotel); Hot-spot navigation interface to access points of interest	Immersive and interactive experiences; visual information
Wong et al. [23] China; Taiwan	Mobile website	Text; pictures	Interaction with the mobile website; visual information
Essawy [24] Egypt	Website	Text; pictures	Interaction with website; visual information
Sulistyo and Pranata [25] Indonesia	Website	No data (n/d)	Interaction with websites; visual information
Lv et al. [26] China; USA	Website	Text with haptic cues; pictorial haptic cues	Visual information to cause haptic sensations
Leung et al. [27] USA; China	Virtual reality (VR)	VR commercials; traditional commercials (video)	Immersive experiences; visual information
Yoon et al. [28] USA	Virtual reality (VR)	VR short clips (e.g. room tour, spa treatment rooms, outdoor and scenic views, golf courses, and beachfront)	Immersive experiences; visual information
Joe et al. [29] USA; Republic of Korea	Website; Mobile websites	Pictures	Visual information

(continued)

Table 12.2 (continued)

Authors Data source (country/region)	Technologies used	Accommodations' information	Experiences provided
McLean and Barhorst [7] UK; USA	Virtual reality (VR)	360° VR tour	Immersive experiences; visual information
Surovaya et al. [18] New Zealand; Australia	Virtual reality (VR)	360° panoramic images of hotel rooms	Immersive experiences; visual information

customers' perceptions when using these digital platforms. Lastly, research developed on virtual reality technologies suggests it enables immersive experiences for travellers while making reservation decisions. Although most of the analysed articles did not provide users' interaction with the virtual world, the interface presented in some research allowed some interactivity by enabling the virtual navigation to some pre-programmed hot spots [3].

Regarding the factors influencing the consumers' decision process when using traditional websites, usability and ease of use play vital roles in impacting significantly e-trust and online booking intentions of consumers [25]. Moreover, the appealing design of information has been shown to impact customers' emotional states positively, fostering positive booking intentions [24], and the entertainment provided and visual effects presented in dynamic web interfaces seem to demand higher levels of customers' attention than static contents [13, 24]. For designing the information to present to the target audiences of accommodation places, it is suggested that using vivid haptic cues such as text descriptions, high-definition images, or more immersive settings plays an important role in mental imagery, helping deliver sensations related to haptic experiences. In this sense, situations with positive and negative haptic cues increased and decreased participants' willingness to book accommodations, respectively [26]. Furthermore, [29] concluded that including photographs of persons in the images promoted by hotels enriches potential clients' imagination of interacting with other guests upon arrival at the hotel, ultimately contributing to engaging customers more successfully and fostering their booking intentions.

Concerning the influence of digital media on the accommodation booking decision process, mobile apps' interfaces designed to be intuitive, responsive, practical, and present simple visual information can facilitate hotel booking and foster customer loyalty, given their convenience [22, 23]. Virtual reality interfaces, on the other hand, enable the sense of immersion and telepresence among users, influencing their hotel

selection process through emotional, memorable, and vivid mental imagery related to hotel environments. These media induce consumers to a more comprehensive pictorial representation of the accommodation spaces, which contributes to developing “realistic expectations that are met following a stay at the hotel” [7] (p. 1245). Additionally, the sense of telepresence and the emotional connections created positively affect the perceptions of hotel service quality, increasing the booking intention of customers [3, 28]. Moreover, the architectural and interior design arrangement of VR rooms influence customers’ emotional responses and whether they perceived the hotel as luxurious and stylish, offering quality food and having clean premises [18]. On a cognitive level, users can remember hotel features longer than ones who only watch pictures or videos, revealing its potential to stimulate mental imagery and more vivid experiences [7]. Furthermore, accommodation managers should consider making use of VR commercials to catch potential clients’ attention close to the time when they are making their reservations, given its efficiency in influencing customers’ immediate decisions, and it is crucial to strategically embed the hotel brand name in every detail to catch customers’ attention, increase their brand recall in the long turn and allow potential clients little cognitive effort to elaborate on the communicated information [27].

12.5 Concluding Remarks, Limitations, and Future Work

This research sets out to conduct a bibliometric and systematic literature review about the contributions of using digital media to support travellers’ decision process during online accommodation booking.

From the conducted bibliometric analysis, it was concluded that academic research only started to gain traction from 2019 onwards, and recent research started to focus on online reviews, online booking platforms, and service quality, while only a small fraction of studies related to immersive technologies, machine learning, and experimental design. Themes linked to virtual reality, mental imagery, online booking, e-trust, website quality, satisfaction, attitudes, online reviews, social media, and hospitality showed high relevance to the field but presented low development degrees. These results stress the pertinence of the conducted study, especially concerning understanding the diverse effects that different media induce on users’ effective perceptions of accommodations, how they affect e-trust, their booking intentions, and, ultimately, the booking decision.

Three types of technology platforms to communicate accommodations to users were concluded from the systematic literature review: traditional websites, mobile websites, and virtual reality. In the case of websites, the information presented to travellers mainly regards pictures of the establishments and text to convey important information. However, it was concluded that clients’ e-trust, booking intentions, and, consequently, the overall decision process are influenced by factors linked to usability, ease of use, high-quality information, entertainment, visual effects, and haptic cues they can access when interacting with websites of accommodation

providers. On the other hand, intuitive, responsive, easy-to-use, and well-designed user interfaces were concluded to benefit the user experience during mobile hotel booking and, thus, contribute to fostering customer loyalty. Despite the identified lack of research concerning the impacts of VR on the customers' booking intention, this technology enables experiencing immersive and interactive scenarios, stimulating the sense of telepresence and vivid mental imagery. It offers customers new ways of developing realistic expectations than other digital media while being more emotionally appealing and increasing their booking intentions.

Based on these results, it is suggested that future research should focus on deepening the practical understanding of the multiple impacts introduced by the adoption of immersive media to support travellers' decision process during online accommodation booking. Furthermore, providing sensory cues to enhance customers' virtual experiences related to accommodation places is also a critical subject for future research, especially concerning the implications of augmenting the experience through multisensory information (i.e. sound, smell, touch, and gustatory, apart from vision). Additionally, although the metaverse is stressed as expected to be the next technological hype for the hospitality and tourism industry, the conducted research did not find any work developed in this field to support customers' decision process during online accommodation booking. Given this reason, it is also crucial that future research focus on this particular technological field to understand how it is perceived and accepted by end users aiming to book accommodations. Equally important would be to comprehend how hospitality providers can position themselves through these new digital market opportunities and how cultural venues surrounding these places can contribute to dialoguing with travellers and foster their intentions to visit them during their stays.

Several limitations of this research should also be acknowledged. Despite the reduction in the unconscious bias deriving from a systematic review, compared to non-systematic reviews, this methodology presents several limitations. The screening process was limited to the records found exclusively in one database (Web of Science). Although recognized as one of the most comprehensive in tourism economics science-related topics, it is not exhaustive, meaning that some relevant publications covered by other databases were not included in this research. Additionally, the carefully discussed and selected search terms can also introduce bias to the data collection process and, therefore, to the systematic review, so the followed methodology cannot be understood as covering the field of study analysis exhaustively. Future research studies could follow the same methodology but use other databases and broader inclusion criteria during the records screening to draw state-of-the-art conclusions in this particular field.

Nevertheless, this study's findings can be used as a starting point for further researchers and are believed to offer new insights and practical knowledge that can benefit managers, travel agencies, digital transformation agencies, other academics, and policymakers. Hopefully, this article will contribute to the emergence of new studies in this field and serve as a reference for future research.

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Chapter 13

Motivating Factors in Choosing a Wine Tourism Destination and Its Impact on Territorial Marketing Policies



Adriano Costa, Teresa Felgueira, and Ana Adegra

Abstract Assessing the level of tourist satisfaction is essential to understand which policies to adopt by the territory to attract and retain tourists. Thus, the present investigation has as its main objective to identify which factors are considered important by wine tourists and which characterise a certain territory and which may lead to satisfaction and, consequently, to the loyalty of this type of tourist. The study was based on the theory of push and pull motivations, but specifically pull motivations. The methodology was based on the application of a survey to a sample of 185 tourists/visitors who visited the Municipality of S. João da Pesqueira—Douro Region, Portugal. The results show that the factors that most contribute to the satisfaction of the wine tourist are the Reputation of the Region and the Offer of Wine Tourism Activities. Satisfaction, in turn, is a variable that influences loyalty, which can be demonstrated in different ways, that is, through repeating the destination or recommending it.

13.1 Introduction

The decision-making process that leads to the choice of a tourist destination is a pressing issue that many researchers consider as a relevant subject of study. But the success of a tourist destination necessarily relies on the knowledge of tourists' motivations and on the understanding of how these motivations can influence satisfaction and thus lead to loyalty to the destination [1–3]. Therefore, it is important for the development of tourism and, in particular, wine tourism, to know how this choice

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process develops. As we know, changes in behaviour can be related to motivations. Hence, it is essential to know them.

Traveller motivations are also influenced by the rules that guide the consumption habits of the time in which they live. Because of this, many studies are focused on understanding the motivations of tourists in specific niches, such as golfers [4], cruise travellers [5], adventure tourists [6], wellness tourists [7], divers [8] and wine tourists [9].

These different behaviours can be related to motivation, which is an altered state that leads to behaviour directed towards a specific goal, i.e. it is the starting point of the consumer decision-making process and an important construct for understanding tourist behaviour [10].

For Klenosky [11] the motivation underlying tourism behaviour is understood by the Push and Pull theory, which provides a simple and intuitive approach to this matter. This theory was investigated by Dann [12, 13] and has been studied and developed by several authors over the past decades.

Dann [13] considers as push factors the motives or forces that guide the decision to make a trip, while pull factors are forces generated by the destination and the knowledge that tourists hold about a destination and that lead them to choose one destination over the other, once the decision to travel has been made. Thus, these factors are considered more decisive in explaining tourist motivation.

Push is associated with the tourist's need to get out of their natural environment, to get out of the routine, to relax in a holiday destination. Its "pushes" the tourist out of the house. Pull factors, on the other hand, are characteristics, attractions and attributes of the tourist destination, which attract the tourist to travel, such as, for example, beach, culture, history, facilities for families, that is, what "pulls" him [13]. These two factors are interlinked by the concept of emotion, since they are more related to personal issues or desires of travellers.

In this sense, it can be seen that the Push and Pull theory presents determining factors for tourism, since tourist motivation is essential for understanding tourist behaviour. It is therefore essential to know what drives people to a particular destination and, in this case, we are talking about internal motivations, also called push motivations and, on the other hand, what the destination offers to attract people to it, and in this case, we are talking about external motivations, also called pull motivations. The latter are the focus of this study.

As tourism is a constantly evolving and increasingly common activity, there is an interest in the study of the theme combined with the Douro region, recognised as a UNESCO World Heritage Site, with the aim of identifying which factors are considered important by tourists/tourists, which characterise a particular territory and which may lead to satisfaction and consequently loyalty to that destination. The identification of these factors will be fundamental to outline the best territorial marketing strategies to apply to the territory, Municipality of São João da Pesqueira, in order to create and structure the anchor tourism product for this region located in the Alto Douro Vinhateiro (Wine Tourism).

13.2 Literature Review

In this research the literature review will focus predominantly on the concepts of Territorial Marketing, Wine Tourism, Motivations, Satisfaction and Loyalty.

13.2.1 *Territorial Marketing and Its Application to Wine Tourism*

Territorial marketing is an approach that aims to promote and strengthen the identity and attributes of a particular region in order to attract visitors, investors and enhance local socio-economic development [14, 15].

Territorial marketing emerges as a response to the challenges faced by regions seeking to stand out in a global competitive landscape [16]. It is based on the valorisation of the natural, cultural, historical and gastronomic resources of a territory, as well as on the construction of a positive image that arouses the interest and curiosity of different audiences [17]. The main objective is to create an attractive perception of the region, whether for potential tourists, investors or for the establishment of companies and talents [16–18]. The territorial marketing strategy is essential to improve the attractiveness of the place, position it and promote it in a global scenario of a competitive economy, and therefore an inseparable tool of the identity of a territory [19]. For this, it is important to look for differentiating elements that will reflect the identity character of the territory.

To implement territorial marketing effectively, strategic planning is needed that involves the collaboration of various local actors, including government authorities, entrepreneurs, associations and communities [20, 21]. The synergy between these agents is essential to develop an authentic and consistent value proposition that highlights the particularities of the region and makes it unique in the context of wine tourism.

One of the most successful aspects of territorial marketing is its application to wine tourism, a form of tourism based on visiting wine-producing regions, providing a unique experience to visitors, who can appreciate the wine-growing environment, get to know the local culture, taste wines and engage in activities related to the sector [22].

Wine tourism has stood out as one of the fastest growing tourism activities in several regions of the world. In addition to promoting the local economy by increasing the flow of tourists, it also generates positive impacts in other areas, such as the valorisation of wine production, the strengthening of local culture and traditions, the creation of direct and indirect jobs and the promotion of tourism infrastructure [23, 24].

Wine regions, in addition to being wine production spaces, become real tourist attractions, offering visitors the opportunity to learn about the entire production

process, from the cultivation of grapes to the elaboration of wine, followed by tastings that enrich the experience. At the same time, wine tourism contributes to the promotion of environmental awareness, as many wineries have adopted sustainable practices in their production [25].

The application of territorial marketing to wine tourism is thus a powerful strategy to position a region in the tourism market, highlighting its qualities and differentials in the wine sector [26], hence it can be concluded that territorial marketing and wine tourism are closely related concepts. Some marketing actions and tools are especially relevant in this context and pointed out by several authors [22–25]:

- i. Identity of the region: It is essential to develop a unique and authentic identity for the region, emphasising its cultural, historical and natural values. This can be achieved through careful territorial brand management, which encompasses the creation of a logo, slogans and other visual elements that represent the essence of the destination;
- ii. Tourist itineraries: The elaboration of tourist itineraries that encompass various wine farms and other points of interest in the region is fundamental to offer visitors complete and enriching experiences;
- iii. Events and festivals: The promotion of wine-related events and festivals, such as wine fairs, harvest festivals, oenological competitions, among others, can attract a diverse audience and strengthen the image of the region as a wine tourism destination;
- iv. Digital marketing and social media: The efficient use of digital platforms and social media is indispensable to reach a wider and more segmented audience, promoting the region and wine tourism experiences;
- v. Partnerships and co-operation: The union between the different local agents, such as wineries, hotels, restaurants and tourism agencies, is crucial to create attractive tourist packages and offer an integrated experience to visitors.

Wine tourism can be seen as a component of territorial marketing as it contributes to the promotion and development of wine-producing regions. By highlighting the wine-related assets of the region, wine tourism can attract tourists and generate economic benefits for local communities, as well as increase the international reputation and visibility of the region [22, 23, 25, 26].

Thus, by incorporating wine tourism into territorial marketing strategies, wine regions can create a unique competitive advantage that differentiates them from other destinations, increases their attractiveness and promotes the sustainable development of a wine region's tourism. By promoting the identity and unique attributes of the destination, wine tourism attracts visitors seeking enriching and authentic experiences, strengthening the local economy and enhancing regional culture and traditions. Collaboration between the various local actors and the efficient use of marketing tools, both traditional and digital, are key to the success of this initiative.

13.2.2 Motivations

Tourist motivation is a topic that has been explored by both academia and the tourism industry, as its knowledge allows answering important questions, such as: what do tourists want and why? [27].

However, the study of motivation is quite complex, as each person has different reasons to consume products and services. Experience, lifestyle, personality and the image an individual wants to project can lead to different consumer motivations.

Thus, many of the studies presented seek to conceptualise tourist motivation based on the social and psychological factors that motivate or create the desire to travel [10, 12, 28–35]. Thus, it appears that the study of this theme has focused on a set of basic theories, namely the Travel Needs Model, which includes the Travel Career Ladder (TCL) and Travel Career Patterns (TCP), the Socio-Psychological Model of Tourist Motivations, Plog's Psychocentrism and Allocentrism Model, the Functional Theory of Attitudes and the Push and Pull Theory.

In this context, Dann [12, 13] and Crompton [36] understand that tourist motivation can be broken down into two motivational factors: push factors and pull factors. He considers as push factors the motives or forces that guide the decision to make a trip, while pull factors are forces generated by the destination and the knowledge that tourists have about the destination and that lead them to choose one destination over the other, after the decision to travel has been made.

Thus, the present study focused on the study of pull factors, which are associated with the destination itself, that is, what attracts the tourist to travel to it [13, 36]. Authors such as Kim et al. [37] present pull factors as forces that influence tourists/enotourists to choose the destination based on its characteristics and particularities. These factors are largely conditioned by people's perception of their needs and whether they will be met [38].

13.2.3 Satisfaction

The quality of tourism products/services offered in a tourist destination has a great influence on the overall satisfaction of tourists [39]. Thus, tourist destinations must provide customers with a high level of satisfaction, which is only possible through the sale of quality services [40].

According to Lestari and Likumahua [41], customer satisfaction is defined as the level of happiness or regret obtained by a person when comparing the expectations of the purchased product with the original product. Therefore, customer satisfaction is one of the fundamental aspects in the management of any business, as it compares the evaluation of the consumer's expectations of a particular product or brand, with the actual quality of the product or brand [42]. Thus, satisfaction is a fundamental variable for attracting and maintaining customers.

13.2.4 Loyalty

In many investigations, different terminologies have been used for the concept of loyalty. Thus, in some of these investigations the word loyalty appears, in others loyalty. As stated by Rivas et al. [3], loyalty and fidelity are two sides of the same coin, which safely provides good results for both parties, such as increased consumer satisfaction and increased profitability of organisations, and it is therefore desirable to establish exchanges between the parties involved.

To create loyalty to a destination, service or brand is to get our customers to realise that it is the best or only acceptable alternative [3].

Thus, the concept of loyalty should be considered as a multidimensional concept that includes aspects related to behaviour (repeat purchase) as well as elements related to attitude (customer referral and positive word of mouth). Therefore, the use of a composite measure increases the predictive power of the construct, since each cross-variable validates the nature of a true loyalty relationship [43].

13.3 Methodology

The methodology used was based on a literature review on the concepts of Territorial Marketing, Wine Tourism, Motivations, Satisfaction and Loyalty.

The sampling process was non-probabilistic or directed. The target population consisted of all visitors/tourists in the region under study, who were asked to respond to an online survey, which was made available via social networks, namely Facebook, WhatsApp and visitors' e-mail addresses. The surveys were collected from March to November 2022. The construction of the questionnaire was based on scales resulting from a review of the literature on pull motives [9, 44, 45], satisfaction [9, 46] and loyalty [9, 46]. The data was processed using SPSS, version 27.0.

The questionnaire was divided into three parts: a first part related to the respondents' holidays, a second part on their motivations, level of satisfaction and loyalty to the destination and a third part on the classification of socio-demographic variables.

A total of 185 surveys were carried out and analysed in terms of their different questions.

13.4 Results

The analysis of results begins with a description of the sample in terms of socio-demographic variables. In terms of gender, there is a predominance of females with 64% of respondents. Regarding age, the largest age group is between 35 and 34 years old with 37%. Regarding educational qualifications, about 80% have a post-secondary education. With regard to the country of residence, it appears that most of

the respondents reside in Portugal, namely 88%. It is also noteworthy that of these residents in Portugal most of them come from the districts of Viseu (33.5%), Porto (18.9%) and Lisbon (13.5%) (Table 13.1).

Taking into account that the psychographic characteristics of the tourist can influence the level of satisfaction and consequently the level of loyalty to a particular destination or to products of that destination, we chose to make a brief characterisation of this tourist. Thus, the following variables were identified: frequency of holidays (weekends), number of repeat visits, type of accommodation, length of stay, period of anticipation of booking and with whom they are spending holidays.

From the data analysis we can conclude that 97.8% of the respondents' holiday 4 or more days. In addition, about 42% say they take four or more short breaks (weekends). It is also noteworthy that most people do not book their holidays in advance (42.2%). Regarding the length of stay in the region, on average people think they will stay 5.90 days. The average spending per person in the region is €284.98. These expenses are related to accommodation, food, transport and souvenirs and

Table 13.1 Demographic characterisation of the sample

Variable		<i>N</i>	%
Gender	Male	67	36
	Female	118	64
	Total	185	100
Age groups	18–24 years old	28	15
	25–34 years old	68	37
	35–44 years old	36	19
	45–54 years olds	29	16
	55–64 years old	18	10
	≥65 years old	6	3
	Total	185	100
Academic qualifications	Basic education	2	1
	Secondary education	36	19
	Post-secondary education	147	80
	Total	185	100
Country of residency	Portugal	163	88
	Outros	22	12
	Total	185	100
District of residence	Viseu	62	34
	Porto	35	19
	Lisboa	25	13
	Outros	63	34
	Total	185	100,0

other expenses. It should also be noted that respondents generally travel with their partner.

It should also be noted that about 92% of respondents have already visited the Douro wine region.

Next, we sought to know the importance attributed to the different items taken into account to assess the pull motivations of this type of tourist.

From the analysis of Table 13.2 we can conclude that the items most valued by this type of tourists are: Beautiful landscape, Good value for money and Calm and Quiet Region, being also among those with the least variability.

In the opposite direction, i.e. the least valued, we can indicate the items Offer of wine courses and Region with lively nightlife, which also present the greatest variability.

Taking into account that the psychographic characteristics of the tourist can influence the level of satisfaction and consequently the level of loyalty to a particular destination or to products of that destination, we chose to make a brief characterisation of this tourist. Thus, the following variables were identified: frequency of holidays (weekends), number of repeat visits, type of accommodation, length of stay, period of anticipation of booking and with whom they are spending holidays.

From the data analysis we can conclude that 97.8% of the respondents do a principal component factor analysis of this set of items in order to find combinations of variables (factors) that explain the correlations between all pairs of variables. For the application and validation of this technique, it is necessary to evaluate the correlations between the variables to know if it is legitimate to perform a factor analysis.

The value of Kaiser–Meyer–Olkin ($KMO = 0.937$), which presents the value of the measure of adequacy, considers the analysis to be of a very good level. Bartlett's test, which tests the null hypothesis that the correlation matrix is an identity matrix, shows a value of 6178.598 and an associated probability of 0.000, which rejects the null hypothesis that the correlation matrix is an identity matrix.

Using the Kaiser criterion (eigenvalue greater than 1), four factors were found that explained 76.817% of the total variance in the set of 29 variables analysed. To better interpret the factors, the axes were rotated using the varimax method. The proportion of variance explained by the components remains constant, but is only distributed differently in order to maximise the differences between the combinations of variables: increasing those that contribute most to the formation of the factor and decreasing the weights of those that contribute least.

The internal consistency of each factor was then analysed using Cronbach's Alpha (α). The α values range from 0 to 1 and the closer to 1, the greater the reliability between the indicators. In this case, the first three factors present a strong internal consistency (higher than 0.90) and the fourth factor presents a good level of internal consistency (0.856).

Table 13.3 shows the weights of the variables in each factor. Thus, factor 1, which we call "Offer of Wine Tourism Activities" (OWTA), is composed of 9 variables and is the factor that contributes most to explaining the total variance (27.237%). Factor 2 is related to the "Diversity of Entertainment and Accommodation" (DEA),

Table 13.2 Average and standard deviation of pull motivations

Items	Average	Standard deviation
Reputation of wineries	3.80	1.219
Famous wine region	4.08	1.066
Great popularity of the region	4.09	1.107
Destination safety	4.38	0.965
Pleasant climate	4.35	0.879
Good value for money	4.40	0.855
Quiet region	4.40	0.898
Hospitality of the local population	4.31	0.902
Cultural and recreational activities on offer	4.07	0.995
Wine festivals on offer	3.84	1.138
Gastronomy festivals on offer	3.91	1.102
Unique accommodation, such as guesthouses or rural tourism	3.94	1.157
Rich historical and cultural heritage	4.29	0.896
Region with lively nightlife	3.57	1.271
Great diversity of things to do	3.93	1.156
Wide range of attractions	3.86	1.141
Possibility to acquire new and rare wines	3.68	1.243
Offer of wine courses	3.45	1.310
Wine tastings	3.70	1.240
Guided tours of cellars/wineries	3.95	1.164
Wide range of accommodation	3.78	1.202
Possibility to participate in rural activities (grape harvesting/treading/ pig slaughter)	3.74	1.201
Existence of wine interpretation centres	3.64	1.287
Winery staff with wine knowledge	3.86	1.160
Good support infrastructure (hospitals/banks/etc.)	3.83	1.238
Good walking trails	4.06	1.056
Beautiful landscape	4.43	0.867
Suitable places for picnics	4.09	1.124
Possibility to interact with winemakers	3.75	1.288
Good signposting to explore the destination	4.04	1.153

contributes 22.057% of the total variance, factor 3, called “Reputation of the Region” (RR), explains 19.989% of the total variance and factor 4 “Natural Conditions of the Destination” (NCD), which contributes 7.533% of the total variance. Only weights greater than 0.5 were considered for easier interpretation and so that each variable only presented weights in a single factor.

Table 13.3 Matrix of components after varimax rotation

Items	Factor			
	1	2	3	4
<i>Factor 1—Offer of wine tourism activities (OWTA)</i>				
Wine festivals on offer	0.680			
Possibility to buy new and rare wines	0.842			
Wine courses on offer	0.815			
Wine tastings	0.841			
Guided visits to cellars/wineries	0.753			
Possibility to participate in rural activities (grape harvesting/ treading/pig slaughter)	0.754			
Existence of wine interpretation centres	0.780			
Staff at wineries with knowledge about wines	0.816			
Possibility to interact with winemakers	0.777			
<i>Factor 2—Diversity of entertainment & accommodation (DEA)</i>				
Cultural and recreational activities on offer		0.703		
Unique accommodation such as guesthouses or rural tourism		0.626		
Lively nightlife region		0.769		
Great diversity of things to do		0.841		
Wide range of attractions		0.808		
Wide range of accommodation		0.692		
Good supporting infrastructure (hospitals/banks/etc.)		0.672		
Good signposting to explore the destination		0.642		
<i>Factor 3—Reputation of the Region (RR)</i>				
Reputation of wineries			0.594	
Famous wine region			0.705	
Great popularity of the region			0.661	
Destination safety			0.826	
Pleasant climate			0.828	
Good value for money			0.751	
Quiet and peaceful region			0.652	
Hospitality of the local population			0.560	
Rich historical and cultural heritage			0.561	
<i>Factor 4—Natural conditions of the destination (NCD)</i>				
Good walking trails				0.537
Beautiful landscape				0.578
Suitable places for picnics				0.558
Eigenvalue	7.899	6.396	5.797	2.185

(continued)

Table 13.3 (continued)

Items	Factor			
	1	2	3	4
Variance explained (%)	27.237	22.057	19.989	7.533
Alpha de Cronbach	0.969	0.940	0.925	0.853

Rotation method: Varimax with Kaiser Normalisation. Rotation converged in 10 iterations

The analysis of these factors can support the strategic decisions of decision-makers. The factor “Offer of Wine Tourism Activities” is the most important, so there is a need to allocate and channel efforts to develop a whole set of activities related to the theme of Wine Tourism, such as holding more fairs/festivals, which allow producers and consumers to face each other.

The questionnaire also contained a set of questions related to wine tourists’ satisfaction and loyalty towards the destination and the destination’s products.

Regarding the satisfaction construct, there is a high satisfaction of respondents with the destination. As we can see in the following table, the averages vary between 4.66 and 4.56 (on a Likert scale from 1—strongly disagree to 5—strongly agree). Regarding the Loyalty items, the values are also quite positive, between 4.74 and 4.49 (Table 13.4).

We then performed a factor analysis of both constructs. The results obtained point to the unidimensionality of both scales, based on the KMO value, Bartlett’s test and item weights. The Cronbach’s alpha values are also excellent and very good, respectively (Table 13.5).

We sought to know which factors influenced satisfaction and how. For this, we will use the linear regression model and we will consider the satisfaction factor as the dependent variable and the factors related to pull motivations and that influence

Table 13.4 Descriptive statistics of satisfaction and loyalty

Items	Average	Standard deviation
<i>Satisfaction</i>		
This visit was worth it, worth my time and the effort spent	4.63	0.638
My choice for this region was very right	4.66	0.641
Coming to this region exceeded my expectations	4.56	0.674
This visit was worth it, worth my time and the effort spent	4.63	0.638
<i>Loyalty</i>		
Intended to return to this region	4.68	0.668
I will recommend my friends and family to come to this region	4.74	0.599
I will start consuming products from this region	4.38	0.859
I will recommend the consumption of products such as wine to my friends and family	4.49	0.788

Table 13.5 Factor analysis values and Cronbach alpha

Constructs	KMO	T. Bartlett	N° factors	Explained variance	Cronbach alpha
Satisfaction	0.718	426.333	1	85.013	0.890
Loyalty	0.705	637.881	1	77.998	0.898

satisfaction as independent variables. The coefficient of determination (R^2) has a value of 0.324 which represents an acceptable measure of fit of the model to the data. Also, the analysis of variance to the model through the Snedecor F test presents satisfactory values ($F = 21.613$ with an associated significance level of less than 0.000). The coefficients of the factors OMTA, DEA, RR and NCD present a positive value of 0.270, 0.188, 0.395 and 0.245, respectively. These values are statistically significant, since the t-test shows significances below 0.005 for all of them.

Considering that from the literature review satisfaction influences loyalty, we will also use the linear regression model in which we consider the loyalty factor as the dependent variable and the satisfaction factor as the independent variable. The coefficient of determination (R^2) has a value of 0.535 which represents a good measure of data adjustments. Also, the analysis of variance to the model, through Snedecor's F test presents satisfactory values ($F = 212.323$ with an associated significance level of 0.000). The linear regression coefficient is positive and high ($Beta = 0.733$). This value is statistically significant ($t = 14.571$ and $sig = 0.000$).

Based on the results obtained and the literature review, we present below the model (see Fig. 13.1) that identifies the different pull factors that influence satisfaction, as well as the relationship between satisfaction and loyalty to the destination and destination products.

From the analysis of the model, we can conclude that the factor Reputation of the Region is the factor that has the most weight in the satisfaction of wine tourists, followed by the factor Offer of Wine Tourism Activities. In addition, and following the example of other studies, the weight of satisfaction in destination loyalty is high.

13.5 Conclusions

The results show that the external motivations of this type of tourist, the wine tourist, are closely associated with the competitive advantages that the region has, namely, the great offer of wine tourism activities, diversity of entertainment and accommodation, reputation of the region and the natural conditions of the destination itself.

On the other hand, we can also conclude that wine tourist satisfaction is a determining factor for building customer loyalty in the wine tourism industry. When visitors have a positive experience, with great wine tasting, welcoming service, charming scenery and enriching activities, they tend to develop an emotional connection and an attachment to the wine region visited. Specifically in wine tourism, satisfaction is a key element for loyalty, as wine tourists seek not only the quality of the wine but

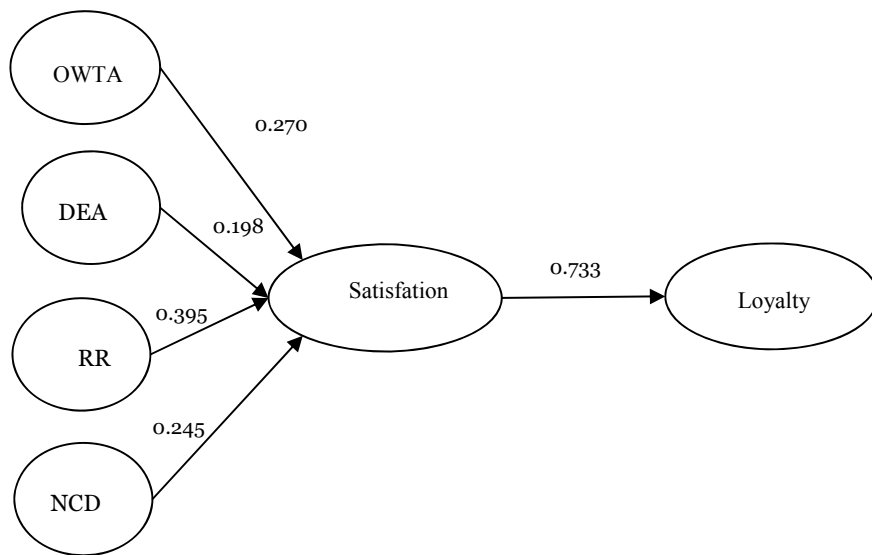


Fig. 13.1 Model of the antecedents of wine tourist satisfaction and loyalty

also a complete and memorable experience. If satisfaction is consistently achieved, wine tourists become brand advocates, recommend the region to friends and family, return for new visits, start consuming and recommending the region's products, thus strengthening the relationship with the wine tourism destination.

This should be the focus of territorial marketing in the context of wine tourism with strategies to boost the socio-economic development of a wine region. In order to strengthen the loyalty of wine tourists through loyalty programmes, the region must continue to invest in the development of activities to promote and publicise the territory, since knowledge of these activities can be a form of attraction to the destination. Thus, messages that appeal to and demonstrate the offer of wine tourism activities, diversity of entertainment and accommodation, the reputation of the region and the natural conditions that the destination has to offer, special events for loyal customers, personalised communication and targeted marketing strategies to create emotional connections and ensure that wine tourists return and recommend the region to others should be included in the territory's dissemination media. And as mentioned in the literature, for the success of these actions the collaboration of the various local actors and the efficient use of marketing tools, both traditional and digital, are fundamental.

Although the conclusions are very relevant, this study presents some limitations, namely regarding the sample, since most of them are female, young, with post-secondary academic qualifications and that may be related to the way the surveys were collected. Thus, further studies are suggested, with more diverse samples and that may also contain other types of motivations, namely the so-called push motivations that may contribute to explain the effects on the intention to visit tourist destinations.

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Chapter 14

Financial Impact of COVID-19: Perspective from the Hospitality and Restaurant Industry



Maria Durães, Alexandrino Ribeiro, and Laurentina Vareiro 

Abstract This study aims to analyze the financial impact that COVID-19 has had on the tourism sector, specifically in the municipality of Braga. In order to understand the economic and financial impact of COVID-19 on businesses in the municipality, particularly in the areas of catering and accommodation, a survey was carried out by means of questionnaires to 120 businesses. Through this study, it was possible to perceive the perspective of financial managers and executives regarding the financial impact of COVID-19 on their companies. In this sample, 55.8% of the companies belonged to the catering sector and 44.2% to the accommodation sector. A profile of the financial manager was identified for both the accommodation and restaurant sectors, with accommodation financial managers being younger and more highly educated. Most companies were in a growth phase and had good liquidity and solvency indicators. With the emergence of COVID-19, there was a disruption in the operations of the enterprises, as most of them were forced to temporarily suspend their activities. As a result of this suspension, there was a significant decrease in the companies revenues, which led to short, medium and long-term financial problems, with a greater emphasis on the accommodation sector. These problems led some enterprises to go into debt, a factor justified by the fall in turnover and the emergence of new loans and debts. In this context, companies had to adapt and create alternatives in order to reposition themselves in the market and avoid bankruptcy.

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14.1 Introduction

The tourism sector plays a significant role in the economic and financial growth of companies and organizations worldwide. Its remarkable potential for expansion enriches both direct and indirect segments linked to the industry, as well as other market sectors. Tourism is an activity with specific characteristics in terms of the range of products and services offered to meet the needs of tourists. This diversity of activities makes the sector highly vulnerable to changes in the external environment. As a result, it is an industry that is highly vulnerable to crises and significant changes.

The COVID-19 pandemic was global in scope, affecting all continents and countries. Consequently, the impact of the COVID-19 pandemic on the tourism sector has been devastating. COVID-19 has had many negative economic and financial effects. Most businesses, with a particular focus on micro and small enterprises, have had to temporarily suspend their services, and many have closed permanently, unable to meet their short-term expenses, thus affecting the liquidity of the business. The participation of micro-enterprises in the economy is of paramount importance as they generate employment for society and drive the development and growth of the destination.

In this study, we first developed a theoretical analysis of the influence of tourism on the development of economies, particularly in Portugal, as well as the impact that COVID-19 has had on this development and how it has constrained it. We then moved on to the main objective of this study: to understand the financial impact of COVID-19 on the tourism sector, particularly from the perspective of the hotel and restaurant industry. To address this issue, a quantitative methodology was used, collecting data through a questionnaire survey conducted in person in Braga during the months of July and August 2022, completed by managers or financial directors of accommodation establishments and restaurants.

14.2 Theoretical Background

The first case of COVID-19 was reported in December 2019 in Wuhan, China, and since then various restrictions have been implemented worldwide. These restrictions have had a profound impact on the tourism sector and its development. The implementation of international travel bans has had a significant impact on international travel, affecting more than 90% of the world's population, from widespread restrictions on public gatherings to social mobility. As a result, tourism came to a standstill in most parts of the world in March 2020 [1].

According to [2], all events, whether expected or unexpected, have a direct or indirect impact on tourism. This sector affects the economy of the host country, including investments made, as well as the hotel and restaurant industry, commerce and entertainment. Another example is the impact on commercial aviation, which is linked to hundreds of jobs and expenditures.

In recent years, tourism has become one of the largest contributors to GDP and employment in many countries around the world. This development has been driven by a number of factors, including advances in communication and transport technologies, changing lifestyles and the emergence of low-cost airlines making international travel more accessible. UNWTO data for 2018 shows that global tourism generated revenues of \$1462 trillion. Of this, about 39% was accounted for by Europe, which received about 51% of the world's total tourists [3]. However, the COVID-19 pandemic has caused significant declines in the tourism sector [4].

In a matter of weeks, some destinations went from being overcrowded to having no tourists, with international tourist arrivals falling massively [5]. According to the UN specialized agency (cited in [5]), the crisis could lead to an annual decline of 60–80% compared to 2019 figures. Tourism has been severely affected, with millions of jobs at risk, as it is one of the largest job creators in the economy [5]. In March 2020, following restrictions imposed by many countries, including travel restrictions and the closure of airports and borders, arrivals plummeted by 57%, resulting in approximately 67 million fewer international arrivals and a loss of US\$80 billion in tourism receipts. The impact was felt most strongly in Asia and the Pacific (−33 million arrivals), with Europe experiencing a slightly smaller decline (−22 million). Outbreaks and uncertainties led to repeated revisions of annual forecasts throughout the year [5].

Before the global coronavirus pandemic, tourism was one of the world's most important economic activities and one of the world's most important industries [6]. The closure of borders and the confinement of people to their homes, considered essential measures to combat the spread of COVID-19, led to a reduction in international tourism revenues (exports) in 2020. According to the author, these reductions were more significant than those recorded during the economic crisis of 2009. As a result of this health crisis, the European Commission estimated a reduction in global GDP of around −3.5% in 2020, −7.4% in the European Union, and around −6.8% in the case of Portugal (GEE, 2020, cited in [4]).

At present, the sector and the world are going through a period of great difficulty, with all the restrictions that have been imposed having a significant impact on the tourism sector and its development. This is an unfavorable reality for all countries that depend on tourism, such as Portugal. These countries are becoming more vulnerable, with all the consequences that this entails for the national and global economy [6].

The emergence of the new pandemic has had numerous negative health, economic, and financial consequences. The severity of the disease has led to countless deaths, and measures have been taken to combat the effects of this virus, such as isolation and social distancing. Most businesses, especially micro and small enterprises, have had to temporarily suspend operations, while others have had to close permanently, unable to meet their day-to-day financial needs. The contribution of small and medium-sized enterprises to a country's economy is of paramount importance, as they create jobs and generate income for society [7].

According to [4], the short and medium term economic outlook for the country, Europe and the rest of the world is highly uncertain. The prevailing uncertainty affects all individual and collective projects and strategies, including those of companies,

families and the State. It is therefore a time of challenge, of searching for solutions and opportunities to rethink social and economic organizational models and market positioning (including the tourism market).

14.3 Hospitality and Restaurants in Braga

14.3.1 Research Problem and Objectives

This study aims to analyze the financial impact that COVID-19 has had on the tourism sector in the municipality of Braga. In this regard, the objective of this study is to understand the perspective of business owners in various tourism-dependent establishments, including hotels, other accommodation facilities and restaurants in Braga, regarding the financial impact of COVID-19 on their businesses.

In order to gain insight into the perspective of business owners and local institutions, the following research questions were posed:

- (1) What is the financial impact of COVID-19 on businesses in Braga?
- (2) What are the main financial management challenges faced by businesses during the COVID-19 pandemic?
- (3) What changes have occurred in the financial management of companies during the COVID-19 pandemic?

By addressing these research questions, the study aims to shed light on the specific financial challenges and changes experienced by businesses in the tourism sector in Braga due to the COVID-19 pandemic. The perspectives of business owners and companies will provide valuable information on the financial impact of the pandemic on local businesses and help to understand the extent of the impact of the pandemic on the tourism industry in the region.

14.3.2 Methodology

This study will begin with a brief review of the literature on the subject, in order to gather information and knowledge from previously published materials. Then, after this theoretical analysis, we will move on to the main objective of the study: to understand the economic and financial impact that COVID-19 has had on the tourism sector, specifically in the municipality of Braga.

In order to understand the perspective of the different companies in the region's hotel and restaurant sector regarding the impact of COVID-19 on their businesses, we carried out questionnaire surveys, considering them the most appropriate data collection instrument for this study. The questionnaires were carried out between July and August 2022, and a total of 120 surveys were obtained from financial managers

or directors. This information was collected face-to-face using Google Forms, as this was considered the best way to effectively obtain the responses required for this study. In order to select the respondents, a survey was carried out on the number of restaurants and accommodation establishments in the city of Braga. This was followed by a route through the city to reach as many respondents as possible. The SPSS tool was used to process the data, allowing a more in-depth interpretation of the results.

The questionnaire is divided into four parts. The first part concerns the characterization of the company and the profile of the financial manager. This is followed by questions about the company's financial behavior before the pandemic and the financial instruments used during the pandemic. To establish a comparison period, the same questions were asked for the period of the pandemic in order to measure the impact of COVID-19 on the company. Finally, they were asked about the reasons that led to the need for debt financing and the main challenges they faced.

14.3.3 Results

14.3.3.1 Company Identification and Profile of the Financial Manager

The study, conducted by means of questionnaires, obtained a sample of 120 companies, with most respondents coming from the restaurant sector (55.8%) and the rest from the accommodation sector (44.2%). We found it relevant to break down the results by market sector in order to provide a more individualized analysis. However, comparable components were considered together. Table 14.1 shows the length of time enterprises have been in business, and we can observe a statistically significant difference in the answers to this question. Most enterprises in the accommodation sector have been on the market for between 5 and 10 years (56.6%).

It is noticeable that no company in the accommodation sector has been in business for less than two years, a factor that can be attributed to the emergence of COVID-19, which has hindered the creation of new companies in this sector due to the restrictions imposed. In the restaurant sector, 38.8% of enterprises have been in the market for between 5 and 10 years. Some 35.8% of respondents in the restaurant sector have been in business for more than 15 years, while this percentage is much lower in the accommodation sector (5.7%).

Table 14.1 also provides a summary of the socio-demographic profile of the financial managers of these enterprises. Most respondents in both the accommodation and the restaurant sector are male, accounting for around 58.5 and 65.7%, respectively, although there is a better gender balance in the accommodation sector.

Most of the respondents are in the 36–45 age group, but in the restaurant sector there is also a significant presence of financial managers in the over 65 age group, which may be due to the fact that restaurant businesses are often run within a family context. Most managers reside in Braga (64.2% in the accommodation sector

Table 14.1 Company identification and profile of the financial manager

	Lodging		Restaurant		Total		X2	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Time of operation in the market:							19.370	0.001*
Less than 2 years	0	0.0	3	4.5	3	2.5		
Between 2 and 5 years	12	22.6	9	13.4	21	17.5		
Between 5 and 10 years	30	56.6	26	38.8	56	46.7		
Between 10 and 15 years	8	15.1	5	7.5	13	10.8		
More than 15 years	3	5.7	24	35.8	27	22.5		
Gender of the financial manager:							0.651	0.420
Female	22	41.5	23	34.3	45	37.5		
Male	31	58.5	44	65.7	75	62.5		
Age group:							2.849	0.415
Between 26 and 35 years	6	11.3	8	11.9	14	11.7		
Between 36 and 45 years	28	52.8	30	44.8	14	11.7		
Between 46 and 65 years	19	35.8	26	38.8	45	37.5		
More than 65 years	0	0.0	3	4.5	3	2.5		
Place of residence:							7.887	0.048*
Braga	34	64.2	57	85.1	91	75.8		
Porto	11	20.8	4	6.0	15	12.5		
Guimarães	7	13.2	5	7.5	12	10.0		
V.N. Famalicão	1	1.9	1	1.5	2	1.7		
Educational qualification of the financial manager:							8.301	0.016*
Elementary education	0	0.0	4	6.0	4	3.3		
Secondary education	13	24.5	28	41.8	41	34.2		

(continued)

Table 14.1 (continued)

	Lodging		Restaurant		Total		X2	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Higher education	40	75.5	35	52.2	75	62.5		
Field of education:							19.937	0.000*
No formal education	13	24.5	29	43.3	42	35.0		
Administration, economics, and accounting	9	17.0	15	22.4	24	20.0		
Tourism	22	41.5	5	7.5	27	22.5		
Other	9	17.0	18	26.9	27	22.5		

Note * indicates $p < 0.05$

Source Own data

and 85.1% in the restaurant sector). Regarding the educational level of the financial managers, it was observed that most of them had higher education, with a higher percentage in the accommodation sector (75.5%) than in the restaurant sector (52.2%), which could be explained by the higher demands of managing accommodation establishments compared to restaurants. Finally, the field of education of financial managers in the accommodation sector is mainly tourism (41.5%), while in the restaurant sector most respondents did not specify a specific field of education (43.3%), followed by other fields of education (26.9%) other than tourism, administration, economics, and accounting.

14.3.3.2 Companies Before the Pandemic Period

It was then considered essential to understand the behavior of the enterprises before the pandemic period. An analysis of Table 14.2 shows that most enterprises were in a growth phase, with 50.9% in the accommodation sector and around 59.7% in the restaurant sector. There is also a small percentage of enterprises in both sectors that were already in decline. This situation of struggle for survival of tourism enterprises was also highlighted by [8].

In terms of financial stability, most enterprises had good liquidity indicators, both in the accommodation sector (88.7%) and in the restaurant sector (92.5%). In other words, they were able to meet their short-term expenses. In the long term, a smaller number of enterprises in both sectors also had good solvency and financial autonomy (69.8% in hotels and 71.6% in restaurants). This means that, prior to the pandemic period, enterprises were able to meet their medium and long-term obligations with good autonomy, without having to resort to bank loans.

Table 14.2 Company's behavior before the pandemic period

	Lodging		Restaurant		Total		X2	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Level of company's turnover							0.923	0.630
In a growth phase	27	50.9	40	59.7	67	55.8		
In a stabilized phase	23	43.4	24	35.8	47	39.2		
In a declining phase	3	5.7	3	4.5	6	5.0		
Presented good liquidity indicators	47	88.7	62	92.5	109	90.8	0.529	0.467
Presented good solvency and financial autonomy	37	69.8	48	71.6	85	70.8	0.048	0.827

Source Own data

It is important to understand the financial management tools used by these businesses before the pandemic period in order to gain a more detailed insight into their operations.

Table 14.3 shows that the most used tools in the accommodation sector are cost control (96.2%), accounts receivable and payable control (92.5%), cash flow control (90.6%), bank reconciliation (56.6%), profit and loss statement (49.1%), and balance sheet (47.2%). The least common tools are internal audit (7.5%) and working capital analysis (3.8%). As for the hotel and restaurant sector, the analysis of Table 14.3 shows that the most prominent tools are cost control (97.0%), followed by accounts receivable and payable control (91.0%), cash flow control (88.1%), profit and loss account (56.7%), balance sheet (55.2%), and bank reconciliation (44.8%). Again, the least used financial management tools are internal audit (22.4%) and working capital analysis (3.0%). It is worth noting that the value of internal audit is statistically different between the two sectors, with a significantly lower percentage in the accommodation sector. This may be due to the fact that a large number of respondents in the accommodation sector are involved in the operation of local accommodation, which may require less stringent internal control and monitoring than in the restaurant sector.

These results show that both sectors are very concerned about managing costs and being productive with a strong focus on cost efficiency. In addition, both sectors show a strong emphasis on managing payment and credit terms with suppliers, as well as ensuring sufficient cash availability for day-to-day expenses. In the restaurant sector,

Table 14.3 Tools used in financial management of the business before the pandemic period

	Lodging		Restaurant		Total		X2	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Cash flow control	48	90.6	59	88.1	107	89.2	0.192	0.661
Accounts payable and receivable control	49	92.5	61	91.0	110	91.7	0.077	0.782
Internal audit	4	7.5	15	22.4	19	15.8	4.891	0.027*
Cost control	51	96.2	65	97.0	116	96.7	0.057	0.811
Bank reconciliation	30	56.6	30	44.8	60	50.0	1.656	0.198
Balance sheet	25	47.2	37	55.2	62	51.7	0.769	0.381
Income statement	26	49.1	38	56.7	46.7	53.3	0.698	0.404
Working capital analysis	2	3.8	2	3.0	4	3.3	0.057	0.811

Note * indicates $p < 0.05$

Source Own data

there appears to be a greater emphasis on the net profit of the business compared to the accommodation sector. This may be due to a greater need in the restaurant sector to ensure profitability at the end of the year.

14.3.3.3 Companies During the Pandemic Period

As given in Table 14.4, most enterprises in the accommodation sector had to temporarily suspend their activities (54.7%), some experienced changes in their activities (43.4%) and only a small percentage continued to operate normally (1.9%). Similarly, in the restaurant sector, the majority had to temporarily suspend their activities (52.2%), some experienced changes in their operations (46.3%), and only a few continued to operate normally (1.7%). The pandemic had a significant impact on both sectors, with a significant number of businesses affected and forced to change their operations to meet the challenges posed by the COVID-19 restrictions and safety measures.

The results show that all businesses in the accommodation sector experienced a decrease in monthly billings (100%), and most businesses in the restaurant sector (97%) also experienced a decrease. These revenue losses are in line with global trends [9–11]. It can be observed that the accommodation sector was more affected by the emergence of COVID-19, as it had higher fluctuations in revenue. Most respondents

Table 14.4 Companies during the pandemic period

	Lodging		Restaurant		Total		X ²	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Functioning of the company during the pandemic:							0.116	0.944
Experienced a change	23	43.4	31	46.3	54	45.0		
Continued to function normally	1	1.9	1	1.5	2	1.7		
Temporarily suspended its activities	29	54.7	35	52.2	64	53.3		
Monthly billing:							1.609	0.447
Decreased	53	100.0	65	97.0	118	98.3		
Remained the same	0	0.0	1	1.5	1	0.8		
Increased	0	0.0	1	1.5	1	0.8		
Percentage change in billing:	n (53)		n (65)		n (118)	(100)		
							2.275	0.517
Below 10%	0	0.0	1	1.5	1	0.8		
Between 10 and 30%	1	1.9	4	6.2	5	4.2		
Between 30 and 60%	10	18.9	13	20.0	23	19.5		
Above 60%	42	79.2	47	72.3	89	75.4		
Ability to settle short-term debts:	n (53)		n (67)		n (120)	% (100)		
Had sufficient assets to settle short-term debts	12	22.6	26	38.8	38	31.7	3.573	0.059

(continued)

Table 14.4 (continued)

	Lodging		Restaurant		Total		X ²	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Had good liquidity indicators	12	22.6	22	32.8	34	28.3	1.515	0.218
Had good solvency and financial autonomy	6	11.3	29	43.3	35	29.2	14.633	0.000*

Note * indicates $p < 0.05$

Source Own data

reported decreases of more than 60% (79.2% in the accommodation sector and 72.3% in the restaurant sector).

In terms of financial stability, the accommodation sector showed a sharp decline compared with the results in Table 14.2. Only 22.6% had sufficient assets to meet short-term liabilities, 22.6% had good liquidity indicators, and only 11.3% had good solvency and financial autonomy. The results for the restaurant sector are slightly different, but still show a significant financial impact. Some 38.8% of respondents had sufficient assets to meet short-term liabilities, some 32.8% had good liquidity indicators, and 43.3% had good solvency and financial autonomy. This last figure is statistically higher than that of the accommodation sector.

The financial ratios of enterprises declined significantly, with a greater impact on the accommodation sector. Accommodation enterprises have a more fixed cost structure than restaurants. This makes the restaurant sector more vulnerable, as fixed costs become a risk when economic activity, especially sales, declines abruptly. As a result, accommodation companies have less financial capacity to cover their expenses, which means they have little ability to meet their short, medium, and long-term obligations. The reduced financial stability increases the probability of bankruptcy. The change in financial autonomy indicates that these enterprises are less able to finance their activities through equity, leading to a greater need for debt financing. This is evidenced by the fact that the accommodation sector has a solvency and financial autonomy value of only 11.3%, while the restaurant sector has a value of around 43.3%.

In times of COVID-19, businesses require more assets, especially cash reserves, to cover cash flow deficits, as highlighted by [9] and Data and Analysis from Census (2021). The accommodation sector was much more affected than the restaurant sector. This could be since other business opportunities arose for restaurants, such as the provision of takeaway services, which restaurants began to implement.

14.3.3.4 The Need for Debt and the Main Challenges Faced by Companies

It was considered important to understand the reasons that led to the need for debt for enterprises with greater financial instability (Table 14.5). In the accommodation sector, the main reasons were a fall in turnover (81.1%) and loans and debts (81.1%). Other costs (26.4%) also played a significant role in the need to seek external finance, together with rent (9.4%), taxes (9.4%), increased staff costs (7.5%), and energy and water costs (7.5%).

In the restaurant sector, loans and debts (55.2%) and a fall in turnover (51.5%) were also the main reasons for the need to borrow, although to a lesser extent. Other reasons given were higher staff costs (19.4%), taxes (10.4%), rents (9.0%), energy and water costs (9.0%), and other costs (9.0%).

The results comparing the two sectors for the reasons ‘decrease in business income,’ ‘loans and debts,’ and ‘other costs’ show statistically significant differences, with a greater impact in the accommodation sector. This factor can be explained by the fact that enterprises in the accommodation sector had a lower financial capacity to meet their obligations during the pandemic period, which led to a greater need to borrow.

Having understood the reasons that led to the need for borrowing, the main challenges faced during the pandemic period were then examined. Table 14.6 shows that the main challenges faced by accommodation businesses were managing the

Table 14.5 Reasons that led to the need for borrowing

	Lodging		Restaurant		Total		X ²	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Increase in personnel expenses	4	7.5	13	19.4	17	14.2	3.421	0.064
Decrease in company revenue	43	81.1	34	51.5	77	64.7	11.290	0.001*
Taxes	5	9.4	7	10.4	12	10.0	0.034	0.854
Energy and water expenses	4	7.5	6	9.0	10	8.3	0.077	0.782
Loans and debts	43	81.1	37	55.2	80	66.7	8.938	0.003*
Rental expenses	5	9.4	6	9.0	11	9.2	0.008	0.928
Other costs	14	26.4	6	9.0	20	16.7	6.495	0.011*

Note * indicates $p < 0.05$

Source Own data

reduction in business income (100%), meeting day-to-day expenses (88.7%), financial management of the business (79.2%), incurring unforeseen financial obligations (79.2%), and laying off staff (71.2%), which were also significant challenges for the accommodation sector. Other challenges included communicating with customers (56.6%), adapting the business to non-face-to-face offerings (52.8%) and complying with government prevention measures (44%).

For enterprises in the restaurant sector, the most difficult aspect was managing the decline in turnover (92.5%), followed by the ability to cover daily expenses (78.8%), financial management of the enterprise (59.7%), adapting the enterprise to non-face-to-face activities (58.2%), compliance with government preventive measures (56.0%), redundancies (50.8%), unforeseen financial obligations (49.3%), and communication with customers (47.8%).

Table 14.6 Challenges faced during the pandemic period

	Lodging		Restaurant		Total		X2	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Measures to prevent COVID-19 imposed by the government	51	44.0	65	56.0	116	96.7	0.057	0.811
Managing the decrease in company revenue	53	100.0	62	92.5	115	95.8	4.127	0.042*
Managing the decrease in company revenue	28	52.8	39	58.2	67	55.8	0.347	0.556
Assuming daily expenses	47	88.7	52	78.8	99	83.2	2.057	0.152
Financial management of the business	42	79.2	40	59.7	82	68.3	5.223	0.022*
Employee layoffs	37	71.2	33	50.8	70	59.8	4.995	0.025*
Emergence of unforeseen financial obligations	42	79.2	33	49.3	75	62.5	11.357	0.001*
Communication with customers	30	56.6	32	47.8	62	51.7	0.927	0.336

Note * indicates $p < 0.05$

Source Own data

The analysis in Table 14.6 shows that there are statistically significant differences in some of the items evaluated. In other words, the two areas had to face certain challenges during the pandemic period with different intensity. We can see that coping with the drop in business turnover was experienced differently, with the accommodation sector experiencing a greater drop in turnover.

The management of the financial aspects of the business was also handled differently, with the restaurant sector finding alternative ways to adapt to the new reality, while the accommodation sector was faced with a complete stop in cash flow, but still had to bear all fixed costs. Despite the fall in turnover, the restaurant sector managed to generate some income through new processes, which led to a greater need for debt in the accommodation sector and a significant difference in the emergence of unforeseen financial obligations.

Layoffs were also more frequent in the accommodation sector, as the lack of income made cost-cutting measures necessary. This health crisis had a negative impact on employment, with significant economic consequences, as highlighted by several studies [9, 12–15].

Finally, it was important to understand whether there were any changes in the use of financial tools during the crisis, in order to assess the increased importance that companies attached to financial management during these difficult times.

Table 14.7 shows that there are no significant differences between the two sectors in terms of the financial tools used during the pandemic. Compared with Table 14.3, we can see that the control of accounts receivable and accounts payable became more important in the accommodation sector (+1.8%), and internal audit became more important in both the accommodation sector (+24.6%) and the restaurant sector (+9.2%). There was also a greater focus on cost control (+1.9% in hotels and +3% in restaurants), the use of balance sheets (+17% in hotels and +7.5% in restaurants), the profit and loss account (+15.1% in hotels and +6% in restaurants), and finally the analysis of working capital (+1.9% in hotels and +3.4% in restaurants). This suggests that financial management tools became more important during the pandemic. The problems caused by the pandemic centered mainly on cash flow issues and the ability of businesses to survive in the short term. As a result, government support focused primarily on short-term survival through credit lines, leave schemes, and moratoria. By effectively minimizing the short-term impact of COVID-19, companies can ensure better survival in the medium and long term.

14.4 Conclusion

It is becoming increasingly clear that the tourism sector plays a crucial role in the development of a destination. This progress is not only due to socio-cultural development, but also to economic growth, as it creates jobs, attracts investment, enhances global recognition, and stimulates demand and development in the destination. Tourism is becoming an essential driver of a country's enrichment on a global scale.

Table 14.7 Tools used in the financial management of the business during the pandemic period

	Lodging		Restaurant		Total		X2	Sig.
	n (53)	% (44.2%)	n (67)	% (55.8%)	n (120)	% (100)		
Cash flow control	48	90.6	59	88.1	107	89.2	0.192	0.661
Accounts payable and receivable control	50	94.3	61	91.0	111	92.5	0.463	0.496
Internal auditing	17	32.1	21	31.3	38	31.7	0.007	0.932
Cost control	52	98.1	67	100.0	119	99.2	1.275	0.259
Bank reconciliation	40	75.5	45	67.2	85	70.8	0.989	0.320
Balance sheet	34	64.2	42	62.7	76	63.3	0.027	0.869
Income statement	34	64.2	42	62.7	76	63.3	0.027	0.869
Working capital analysis	3	5.7	5	7.5	8	6.7	0.154	0.694

Source Own data

In 2020, however, this progress came to a halt with the emergence of the COVID-19 pandemic. The impact of the pandemic was evident in the lack of demand and loss of revenue for companies in the sector. Many companies focused on cutting costs and reducing their workforce. Some also took the opportunity to invest in small projects as there was less activity in their services during this period.

Analysis of the results of a survey of accommodation and catering businesses in Braga revealed the perceptions of financial managers about the impact of COVID-19 on their businesses. Of the 120 companies surveyed, the majority belonged to the restaurant sector (55.8%), with the remainder in the accommodation sector (44.2%). Most of the replies came from enterprises that had been operating for 5–10 years (56.6% in the accommodation sector and 38.8% in the restaurant sector).

As regards the profile of financial managers, the majority were male in both accommodation (58.5%) and restaurants (65.7%). They were mostly in the 36–45 age group and were residents of Braga (64.2% in hotels and 85.1% in restaurants). Financial managers were mostly university graduates (75.5% in accommodation and 52.2% in restaurants), with a significant number having a background in tourism (41.5% in accommodation) and others not specifying their field of education (43.3% in restaurants).

Before the pandemic, most enterprises were in a phase of growth (50.9% in accommodation and 59.7% in restaurants), with good liquidity indicators (88.7% in accommodation and 92.5% in restaurants), which meant they were able to cover daily expenses. They also showed a good ability to manage medium and long-term

expenditure, with high solvency and financial autonomy (69.8% in accommodation and 71.6% in restaurants). During the pandemic, most enterprises had to temporarily suspend their activities (54.7% in accommodation and 52.2% in restaurants) and their turnover decreased significantly (100% in accommodation and 97% in restaurants), with fluctuations of more than 60% in most cases (79.2% in accommodation and 72.3% in restaurants). The accommodation sector was more affected by the pandemic.

A comparison of the behavior of enterprises during the pandemic showed that the financial stability of enterprises decreased significantly. In the accommodation sector, only 22.6% had sufficient assets to meet short-term debts and 11.3% had good solvency and financial autonomy (down from 66.1 to 58.5%, respectively). In the restaurant sector, 32.8% had good liquidity and 43.3% had good solvency and financial autonomy (decreases of 59.7 and 28.3%, respectively). Once again, the accommodation sector was more affected than the restaurant sector. Enterprises in the accommodation sector showed a lower financial capacity to meet their obligations, resulting in a greater need to borrow.

Regarding the limitations of this research, I would like to highlight the difficulty of the respondents to cooperate in this study. The managers/chief financial officers were not receptive, which could be explained by the fact that this is financial information and requires a more sensitive study. As the data was collected face-to-face through a questionnaire survey, another limitation is that in many situations there was little availability, resulting in a smaller sample.

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Chapter 15

The Dynamics of Participant Engagement in a Food Festival: The Soup Congress Case in Tomar



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Abstract In an era where specialized events are becoming pivotal in tourism and local economies, this study offers a comprehensive analysis of an under-researched area: food events. The paper examines the demographics, satisfaction, and future intentions of visitors to the Soup Congress held in Tomar, Portugal. Utilizing a case-study approach, the research adopts a quantitative methodology, analyzing data from questionnaires administered to event participants and supported by existing tourism literature. Data were collected and subsequently analyzed using SPSS software, with statistical techniques employed to test hypotheses and examine relationships between variables. The study finds that the congress appeals to a diverse demographic and identifies notably high satisfaction rates and robust intent to return among attendees. These outcomes suggest effective management and successful engagement strategies deployed by the event organizers. While the study recognizes strengths, it highlights the need for better integration of the congress with local cultural and touristic activities, as many attendees did not participate. The research suggests re-evaluating the event's infrastructure and pricing, considering the diverse employment statuses of attendees. These findings provide insights for the future planning of the Soup Congress and other food festivals, with wider implications for event management.

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15.1 Introduction

Tourism operates as a global engine driving economic advancement and promoting socio-cultural connections [1]. Within the multifarious sectors of tourism, event tourism has gradually risen to prominence, sparking considerable scholarly, and industry interest. Notably, gastronomic events are now recognized as powerful drivers in the broader landscape of tourism [2]. They serve as focal points for tourist attraction and contribute to the reshaping of destination images [2]. Despite their increasing importance, there is a significant gap in literature that addresses the synergy between gastronomic events and local tourism development [2]. This study turns its lens toward the annual Soup Congress held in Tomar, Portugal, a gastronomic event that plays a critical role in enhancing the local tourism appeal [3]. We explore the Congress's impact on various metrics, including visitor satisfaction, destination image, tourist expenditure, and propensity for revisits. This is aimed at addressing the existing literature gap and contributing to a more comprehensive understanding of how gastronomic events affect local tourism [2]. Utilizing a robust dataset gathered from surveys of Congress attendees, this study provides empirical insights into the multi-dimensional aspects of the tourist experience. The intent is to offer valuable knowledge for stakeholders, ranging from tourism planners and policymakers to local businesses and the community at large [3]. The outcome of this research is poised to inform and influence strategies for event planning, management, and marketing, thereby aiding cities like Tomar in leveraging gastronomic events as potent catalysts for tourism growth [2, 3].

15.2 Literature Review

Recent literature underscores tourism's multifaceted role in both economic development and socio-cultural interchange, with specific emphasis on its multi-dimensional nature [4]. The significance of events in shaping tourist behaviors extends beyond conventional tourism paradigms [5, 6]. A burgeoning interest lies in gastronomic tourism, where events serve as platforms for culinary exploration and cultural immersion, aligning with experiential tourism paradigms [7, 8]. Economically, gastronomic events bolster local economies [9], and while broader studies, such as Quinn's on arts festivals, reflect on their economic benefits [10], they also spotlight socio-cultural impacts and contributions to destination branding [3, 10]. However, despite initial explorations by Sio et al. [2], gaps persist in context-specific analyses of these events' comprehensive impacts, including visitor satisfaction and tourist expenditure.

15.3 Methodology

This study utilizes a quantitative methodology anchored in a positivist philosophy to analyze data from attendees at the 2019 Congress of Soup event in Tomar, Portugal, presuming that observable data patterns yield measurable insights [11]. Primary data were sourced via a structured questionnaire tailored to gastronomic events, capturing variables like attendee satisfaction, perceived value, destination image, and spending patterns, along with demographic information for stratified analysis [4, 12]. Given the event's specific nature and logistical challenges, a convenience sampling was chosen, with recognition of potential limitations in generalizability [4]. Data were rigorously analyzed using SPSS, encompassing descriptive statistics, inferential techniques like chi-square tests, and regression analyses to discern relationships and predict trends [13].

15.4 Context of Tomar and the Congress of Soup

Located in the heartland of Portugal, Tomar emerges as an idyllic city steeped in a rich tapestry of history and culture, serving as a potent magnet for tourists globally. Its diverse offering, ranging from the UNESCO World Heritage site of the Convent of Christ to the alluring charm of its medieval architecture, extends an intriguing narrative of Tomar's past, underscoring its unique cultural landscape [14]. A key element enhancing this allure is the array of unique events hosted within the city, of which the annual Congress of Soup remains a significant attraction. This gastronomic rendezvous acts as a vibrant celebration of the universally loved dish—soup, transcending boundaries and offering a gourmet spectacle of diverse soup variants. Through a myriad of culinary demonstrations, food enthusiasts and tourists alike are plunged into a sensorial exploration of taste, heritage, and communal bonding [15, 16]. The Congress of Soup, as an event, is not merely an expression of Tomar's gastronomic prowess; it signifies an active medium through which the city negotiates its cultural identity, contributing substantially to the ongoing construction of its touristic appeal. The event intertwines local culinary traditions with innovative gastronomic practices, thereby reinforcing Tomar's position on the gastronomic tourism map [8, 9]. As a result, the Congress of Soup holds a dual role. It is not only a platform where tradition and innovation converge in a culinary dialogue but also a strategic tool in promoting Tomar as a desirable tourist destination. This event-centric strategy, often termed “eventification” [17], underscores the importance of events like the Congress of Soup in stimulating tourism, enhancing visitor experiences, and fostering economic development in cities like Tomar. It enables the city to showcase the depth and breadth of its culinary traditions, enhancing its image as a distinguished gastronomic destination [18]. This emphasis on regional cuisine not only provides tourists with unique, culturally immersive experiences but also cultivates a sense of pride among locals for their regional culinary traditions [19].

In line with the growing trend of gastronomic tourism, the Congress of Soup adds a unique dimension to Tomar's tourist offerings, rendering it an essential stop on the gastronomic map of Portugal. Gastronomic events such as this one have the potential to influence tourists' destination choices and motivate travel [20]. Such events increase the allure of a destination by adding value to the overall tourist experience and creating distinct gastronomic narratives that cater to the ever-evolving tourist palette [21]. Another element to consider in the context of the Congress of Soup is its attention to environmental considerations. The event often highlights soups made with ingredients sourced from the local region, subtly emphasizing the link between food production, consumption, and sustainability in the culinary realm and the use of more sustainable products such as plates, cups, spoons. This aspect not only adds to the event's interest from a visitor's viewpoint, but also subtly underlines the value of supporting local economies, nudging toward sustainability. This research will further examine the role it plays within Tomar's wider gastronomic tourism sector.

15.5 Research Questions

Tourism, as a multifaceted global phenomenon, facilitates economic development, cultural exchange, and diplomatic relations [1]. Various niches including cultural, historical, and gastronomic tourism, contribute to its comprehensive framework, with event tourism gaining academic traction due to its role in enhancing tourist influx and destination appeal [5, 6]. Gastronomic events have surfaced as distinct drivers of tourism, influencing tourist preferences, dovetailing with experiential tourism trends, and creating direct and indirect economic impacts [7]. They serve not only as economic stimuli, but also as socio-cultural platforms for cultural preservation, community pride, and destination branding [3]. The present research aims to unravel the dynamics and impacts of gastronomic events, particularly the Congress of Soup, on tourism-related dimensions such as visitor satisfaction, destination image, and revisit intentions. It also fills a gap in the literature by offering a comprehensive exploration of the event, situated in the framework of destination branding and experiential tourism [22]. The study is founded on an empirical approach, utilizing data from a survey of Congress of Soup attendees and applying descriptive and inferential statistical analysis. The study's outcomes have broad ramifications, providing insights for tourism stakeholders, offering potential for local businesses to capitalize on the event, and fostering socio-cultural understanding for Tomar residents. Addressing the following research questions helps elucidate the role of the Congress of Soup in Tomar's gastronomic tourism landscape:

1. "Who are the attendees of the Congress of Soup?" This captures a demographic profile of attendees, enabling a holistic understanding of the event's audience [23].

2. “Do attendees intend to return to future Congress of Soup?” The intent to revisit the event can illuminate the contribution of the Congress to sustainable tourism growth in Tomar [24].
3. “How do attendees perceive the Congress of Soup and the broader Tomar experience?” Probing into attendees’ satisfaction and cultural tourism activities can offer a comprehensive understanding of their overall experience [25].
4. “What is the attendees’ perception of event support at the Congress of Soup?” Insights into event support can guide continuous enhancement of event infrastructure [26].
5. “Does attendees’ perception of the event’s pricing impact their intent to return?” The role of pricing strategy in influencing revisit intentions is evaluated through this question [27].

Findings regarding the Congress of Soup’s demographic appeal, participant satisfaction, infrastructure, and pricing can guide enhancements for culinary events and local tourism growth.

15.6 Results

15.6.1 *Sample and Survey Administration*

The 26th Edition of the Congress of Soup in Tomar attracted a total of 2036 attendees. The study employed a non-probability sampling technique to gather responses from a judiciously selected cohort of attendees. Our sample size included 249 respondents, representing approximately 12.22% of the overall participant population. Given the one-day duration of the event, which took place from 12 to 6 PM, the survey was administered throughout the entire event to capture a wide range of experiences and perceptions. The survey instrument was designed to capture multiple facets of attendee experiences and perceptions. It included 36 questions covering various topics such as demographic information, attendance characteristics, travel and tourism behaviors, event evaluation, and future intentions. The questions were designed to address the five research questions outlined earlier, providing a holistic view of the attendee experience and the event’s overall impact.

The questionnaire was organized into the following sections:

Demographics (Questions 1–4).

Attendance Characteristics (Questions 5–8).

Travel and Tourism Behavior (Questions 9–12).

Event Evaluation (Questions 13–26).

Future Intentions and Suggestions (Questions 27–36).

The questions included multiple-choice, Likert scale, and open-ended formats, allowing for both quantitative and qualitative data collection. The range of questions

aimed to offer a comprehensive understanding of attendee profiles, perceptions, satisfaction levels, and revisit intentions, which aligns well with the research objectives. It is important to underscore that this sample, while illustrative, may not manifest full generalizability to the broader target demographic.

15.6.2 Participant Profile

In an endeavor to encapsulate the participant profile, a compendium of variables underwent rigorous scrutiny. These comprised nationality, age, gender, domicile status in Tomar, contemporary place of residence, occupational status, vacation interval, inaugural congress participation, transportation modality to the congress, solitary or companioned attendance, precedent cultural and tourist expeditions, toured attractions, post-congress tourism aspirations, cognizance of the congress, awareness of the congress orchestrator, evaluation of price equity, acquaintance with the congress's mandate/objective, ticket procurement latency, overall information gratification, motivational constituents impelling participation, favored soup variant, recurrence of prior congress participation, congruence of expectations with event outcomes, appraisal of stall abundance, critique of event infrastructure (sanitation facilities, parking amenities, accessibility, directional signage, and event aid), cumulative event satisfaction, intentions to patronize ensuing congress editions, propensity to frequent represented gastronomic establishments driven by curiosity, and recommendations for prospective interactions.

15.6.3 Descriptive Statistics

The event sample consisted of 249 attendees, with the majority being Portuguese (82.7%) and a significant minority being Spanish (11.2%). Other nationalities represented included English, French, German, Guinean, Italian, and Swiss. The age range was broad, from 6 to 89, with a substantial number falling between 20 and 46 years old. The gender distribution was almost even, with females making up 56.6% and males 43.4%. In terms of residency, 45.8% lived in Tomar, while 54.2% were from elsewhere, with the largest group being from Lisbon. When it came to employment status, slightly more were employed (57.4%) than unemployed (42.6%). Almost a third of the attendees were on vacation, suggesting the event attracted both tourists and locals. The attendees resided in a variety of locations, with the largest group residing in Lisbon. 54.2% of the attendees had been to the event before, indicating a good mix of new and repeat attendees. In terms of transport, 42.6% used their own vehicles while 34.1% walked. Most attendees came with others (83.9%) and the majority (87.1%) did not engage in tourist visits before the event. Most attendees intended to go home after the event (77.5%), with the rest planning to stay in a hotel. Finally, most attendees found out about the event through friends (41.8%) or the Internet

(28.1%). Satisfaction with the Congress was high, with 85.1% satisfied, 4% dissatisfied, and 10.8% neutral. Event organizers were recognized by 55.8% of respondents. Ticket pricing was considered fair by 76.3%, and 59.4% were informed of the event's objective. The ticket acquisition wait time was viewed as unsatisfactory by 34.1%. Event information was deemed sufficient by 62.2%. The main participation motivation was social interaction (44.2%). Most preferred "Sopa de Peixe" (Fish Soup) at 12.0%. Repeat attendance varied, with the largest group (27.3%) first timers. The event met expectations for 95.2% of participants. The number of stalls was found sufficient by 83.9%. Potential improvements include clarity on event objectives, streamlining ticket acquisition, and optimizing information dissemination. Social interaction and soup variety were key motivators. Infrastructure assessment showed split opinions on restroom facilities (34.1% insufficient) and parking (43.8% insufficient). Event access (85.1% satisfactory) and signage (81.1% sufficient) were viewed positively. Event support was deemed satisfactory by 90.8%. Satisfaction levels were 64.7% satisfied, 32.1% very satisfied, and 3.2% dissatisfied. A high intent for return attendance was noted (77.1%). Responses were mixed on curiosity to visit represented restaurants (40.6% yes, 31.3% unsure, 28.1% no). Common improvement suggestions pertained to parking facilities, restrooms, event access, signage, and soup offerings.

15.6.4 Statistical Inference

To evaluate the statistical significance of observed relationships, we employed an inferential statistical framework. Depending on the nature of the research questions and the relationships under investigation, either chi-square tests or logistic regression analyses were used to assess categorical variables.

Research Question 1: Demographics

Findings: The majority of attendees were Portuguese (82.7%). The event attracted a balanced mix of first-time and repeat attendees. A youthful audience was predominant, specifically in the 21–27 age range, with a notable peak at 22 years old.

Statistical Tests: Chi-Square.

Significance Level: Not specified.

Research Question 2: Return Intention and Influencing Factors

Findings: Approximately 77.1% of participants intend to return, suggesting high attendee loyalty. However, 20.9% were undecided. Significant factors influencing the intention to return included participant satisfaction ($p < 0.001$) and interest in local gastronomy ($p = 0.043$).

Statistical Tests: Chi-Square, Logistic Regression.

Significance Level: $p < 0.001$ for satisfaction, $p = 0.043$ for gastronomy interest.

Research Question 3: Participant Perception and Activities

Findings: The vast majority (95.2%) felt that the event met or exceeded their expectations. Despite this, 87.1% did not partake in any cultural or touristic activities in Tomar before the event.

Research Question 4: Facility Satisfaction

Findings: Restroom facilities did not significantly impact return intentions ($p = 0.070$). However, parking facilities showed a marginally significant association ($p = 0.078$) with return intention.

Statistical Tests: Chi-Square.

Significance Level: $p = 0.070$ for restrooms, $p = 0.078$ for parking.

Research Question 5: Pricing Perception

Findings: A significant relationship exists between the perception of pricing fairness and the intention to return (Chi-square = 39.801, $p < 0.001$). Notably, no participants who viewed the pricing as unfair intended to return.

Statistical Tests: Chi-Square.

Significance Level: $p < 0.001$.

15.7 Discussion

The Soup Congress has demonstrated its efficacy as an inclusive and rewarding event, attracting an assorted and international audience with a significant Portuguese (82.7%) and growing Spanish (11.2%) demographic, alongside smaller representations of English, French, German, Guinean, Italian, and Swiss attendees. The wide age range (6–89) of participants, with a considerable portion (20–46 years old), further substantiates the diverse appeal of the event. Moreover, the balanced gender distribution (females at 56.6% and males at 43.4%) signifies the event's ability to attract diverse genders. The high intent to return amongst 77.1% of participants is a testament to the successful execution of the event. Conversely, the 20.9% of attendees who are unsure about future participation highlight a need for further examination into their hesitations. The satisfaction levels were high, indicating effective event organization. However, an area of potential growth is the integration of cultural and touristic activities, given that a significant majority (87.1%) did not partake in such visits before the congress. The analysis of overall satisfaction and curiosity toward local gastronomy is crucial as these factors have proven integral in shaping attendees' intent to return. Infrastructure aspects such as transportation and residence, while not directly impactful, influence the overall attendee experience. For example, most attendees preferred to use their own mode of transport (42.6%) or walk (34.1%). This data might be reflecting factors such as the proximity of attendees' residences to the congress venue, as well as the availability and convenience of different transport options. Moreover, most attendees planned to return home after the event (77.5%),

implying that a majority lived within commuting distance or preferred the comfort of their homes to staying in a hotel. Price fairness emerged as a critical determinant of repeat participation. However, the event organizers should also consider the employment status and vacation period of attendees. A slight majority of attendees (57.4%) were employed and might have more discretionary income, while a sizeable percentage (70.3%) were not on vacation during the festival, indicating the event drew a substantial local or non-vacationing crowd.

15.8 Concluding Remarks

Building on these insights, future initiatives should focus on the “undecided” 20.9% of attendees to better understand their hesitations and incorporate local cultural and touristic activities into the event itinerary. The study also emphasizes the importance of infrastructural planning and transparent pricing strategies for influencing return rates positively. The proposed development of a user-friendly app could serve as an effective tool for information dissemination, enhancing attendee experience and engagement. Continual improvements in these areas will contribute to the event’s long-term success, especially when contextualized within the broader landscape of similar events.

15.9 Comparative Context

When compared to similar events in Portugal and other countries, the Tomar Soup Congress exhibits several distinct traits. Firstly, the high intent to return (77.1%) among attendees is noticeably higher than similar gastronomic and cultural events nationally and globally. This could be attributed to various factors including the unique appeal of the event, effective organization, and high participant satisfaction. However, there’s a gap to bridge concerning cultural engagement; unlike other events where attendees frequently engage in local touristic activities, 87.1% of attendees at the Soup Congress did not participate in such activities. These comparative observations illuminate potential areas for event enhancement and underscore its unique strengths.

15.10 Limitations and Future Research

While this study provides actionable insights, its limitations warrant discussion. First, the study’s focus on a specific region and event type may limit the generalizability of the findings. The sampling method could also introduce bias, restricting the broader

applicability of the results. Additionally, the study's cross-sectional nature hampers its ability to capture evolving trends and attitudes among attendees over time.

Future research avenues are abundant. Subsequent studies could employ a longitudinal approach to gauge the shifting attitudes and demographics of the event. Further, qualitative interviews could delve into the motivations of the “undecided” attendees, whose reservations are not fully captured in the current study. Comparisons with similar events in different locations would add a layer of complexity and depth, providing a more nuanced understanding of attendee behavior across different contexts.

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Chapter 16

Proposal for the Creation of a MOOC on Military Tourism



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Abstract In recent years, we have seen a decline in mass-market tourism patterns and a growing interest in personalised and distinctive experiences. Military tourism fits perfectly into this new demand. Connecting with the military history and culture of a particular region or community offers a unique opportunity to explore and understand the key events and social influences that have shaped that region/community. To keep up with this trend and to meet the needs and expectations of visitors, it is important that professionals working in military tourism are properly empowered with the necessary knowledge. In this sense, and according to the training gap identified, this paper proposes the creation of a military tourism training programme, in MOOC format, aimed at professionals in the tourism sector, to enhance their specialised skills and improve the quality of tourist experiences. The MOOC consists of three modules with broad themes according to the identified training needs, with each module containing with specific training topics, using gamification strategies to make the learning process more engaging and interactive. Training in MOOC format allows tourism professionals to follow the content at their own pace, autonomously and according to their availability. The intention is to make this MOOC available on NAU platform and future work will include evaluation of the MOOC by its users.

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16.1 Introduction

Military tourism has grown in popularity in recent years, offering visitors a unique opportunity to learn about the history and culture of a particular region, primarily through its military history [1].

With the growth of military tourism comes a growing demand for operators who can provide enriching and immersive experiences for visitors interested in the history and culture of a region, especially in the context of military history. To meet this demand, it is essential that professionals in the sector have specialist skills and in-depth knowledge of the historical events, cultural contexts and military nuances of the area in question [2].

In recent years, there has been an interest in the training of professionals working in military tourism in Portugal, to keep up with new market trends and to meet the expectations of visitors looking for this type of experience.

Between December 2018 and February 2019, the first Military Tourism Course [3] took place, organised by the Polytechnic Institute of Tomar (IPT) in partnership with the Portuguese Military Tourism Association (ATMPT), with the institutional support of the Municipality of Tomar and the Regional Tourism Authority of Central Portugal. The short course was attended by 20 trainees from different public and private institutions, different areas of work and different regions of the country. At the end of the course, ATMPT carried out a questionnaire among the trainees to collect some data on the topics covered. The trainees expressed particular interest in the sessions on storytelling, memories, narratives and innovation. Regarding the areas of interest for future training in the context of military tourism, they highlighted military and historical heritage, tourism and cultural communication and heritage conservation and valorisation.

Following the growing interest and need for training in military tourism, ATMPT, in partnership with TECHN&ART/IPT and the Regional Tourism Authority of the Centre of Portugal, promoted various actions of “Capacity Building for Military Tourism” [4], together with the Municipalities of the Central Portugal Region. Between the months of October, November and December 2019, training actions were promoted on “Military Tourism Routes”, “Storytelling”, “Organising and Conducting Accompanied Visits” and “Museology, Military and Historical Heritage”, with the aim of raising awareness and informing public and private actors working in tourism and national military history about good practices in the field of tourism activation of military and historical heritage. In addition to theoretical sessions, lunch debates with professionals in the field and technical visits to the sites where the actions took place were promoted.

More recently, as part of the Napoleonic Itineraries Portugal project, led by the Coimbra Region Intermunicipal Community, made up of 13 municipalities and funded by Turismo de Portugal, I.P., online sessions were organised for tourism agents and employees of the municipalities involved in the project, to present the project and promote the exchange and capacity building of agents working on the same theme in different territories. The sessions “Napoleonic Itineraries: from resource to tourism

product” took place on 9, 11 and 16 November 2022 and were hosted by ATMPT, with the themes “Military Tourism and Napoleonic Itineraries: Network Project”, “Product Development and Structuring” and “Storytelling: Narratives applied to heritage and military tourism” [5].

Apart from the training actions mentioned above and the occasional exchange of knowledge between professionals in the field, there is currently no specific training in military tourism to accompany the new trends in demand for this type of experience.

Another case that has been observed in Portugal in recent years is the incorporation of immersive technology into the visitor experience, either in monuments, interpretation centres, museums or in conjunction with temporary exhibitions. For example, the Municipality of Almeida invested in the creation of the “Conhecer Almeida” app, which allows the user to take a guided tour of the built heritage of the Almeida Fortress through augmented reality (AR) [6]. Another case is the aforementioned “Napoleonic Itineraries Portugal” project, which is still in progress, incorporates gaming elements into the tourist experience through virtual reality (VR). And the temporary exhibition “Fuzileiros: 400 anos” at the Naval Museum included a series of digital and interactive experiences through AR and a video mapping show [7]. Despite the awareness of the importance of accompanying technology in the tourism sector, and more specifically at the level of military tourism, investments often depend on applications for national and European funds to realise these projects.

In any case, there is no specialised training in military tourism, accessible to all, to strengthen the skills of professionals in the field.

In line with the identified training gap, this paper proposes an online training programme for tourism operators, in a Massive Open Online Course (MOOC) format, with the aim of fostering the acquisition of specialised skills and enhancing the quality of tourist experiences. It is possible to attest that MOOCs aimed at professionals in the field of the course have a higher demand and a higher level of execution, because the objective is to strengthen their competences and recycle knowledge [8].

The creation of a MOOC in Military Tourism will make it possible to reach a large number of professionals in the field, from different regions of the Portuguese territory, where they can learn at their own pace, according to their availability. The course consists of three main modules, each focusing on key aspects of military tourism, with three topics each, previously identified as specific issues and training needs, adopting gamification strategies to make the learning process more engaging and interactive.

The development and implementation of this programme should be guided by an inclusive, collaborative and interactive process using gamification, involving feedback from participants and continuous refinement of the curriculum based on the evaluation of learning outcomes. The goal is to create a programme that is both pedagogically sound and engaging, that not only equips operators with the skills they need, but also fosters a culture of continuous learning and improvement within the sector [9].

16.2 Literature Review

16.2.1 Military Tourism

Military tourism is a subcategory of cultural tourism that focuses on visiting sites associated with military heritage, such as battlefields, military museums and memorials [10].

According to the most recent definition proposed in the Encyclopedia of Tourism Management and Marketing, military tourism can be defined as a type of tourism “(...) based on the demand for places of historical and cultural interest associated with military history in a given country or region, as well as the associated authentic and distinctive experiences that evoke the history of a place and its community” [11].

Military history plays a crucial role in creating a national narrative of patriotism and identity, rooting a sense of belonging to the community and its historical heritage. As well as instilling pride and unity, it has a strong educational dimension, making society aware of past events and their lessons, fostering a deeper understanding of the past and a commitment to national values for the future [12].

As well as promoting historical and cultural knowledge, military tourism acts as a catalyst for the development of new products and experiences. It has the potential to stimulate the creation of new products and activities, while playing a key role in driving innovation and enriching the local landscape and communities [13].

16.2.2 Skills Required for Operators in Military Tourism

Operators need a range of skills to deliver the high-quality tourism experience that is now demanded. These include interpersonal skills, leadership skills and the ability to develop, programme, create, plan and manage tours or tourism experiences [14].

In the context of military tourism, the needs remain the same. To provide a differentiated and high-quality experience for visitors interested in military history and culture, operators need to have a unique combination of skills.

Operators should have a thorough knowledge of military history and heritage, including historical events, personalities and associated military structures. Being familiar with the historical facts and having a thorough knowledge of the sites where they operate will enable them to provide accurate information and create engaging narratives to capture the attention of visitors, thereby also contributing to the protection and enhancement of this heritage [15]. Respect and understanding of the significance of these sites is key. It is important to be culturally sensitive when dealing with sites that may have important emotional or historical significance for local communities or visitors [16]. Of course, interpersonal skills are key to connecting with tourists, empathising with them and understanding their individual needs and interests.

To be able to create and develop military tourism products, it is important that operators effectively understand the concept of military tourism [13]. By knowing the

genesis of the concept in Portugal and its evolution over time according to different interpretations in the global context, operators will be able to structure products in this area according to the needs existing in the different regions of the Portuguese territory [17]. Creating tourism experiences in a military context requires careful planning and efficient organisation, with the capacity to be flexible and adaptable.

One of the characteristics of military tourism is the creation of differentiated experiences that integrate different tourism segments [11], such as wine tourism or nature tourism. To produce this type of experience, operators need to have a thorough knowledge of the existing resources that can be linked to the experience, such as local wine tastings, gastronomy or outdoor tours. It is important to develop interesting itineraries, select the best locations and ensure proper logistics.

In the field of military tourism, operators should adopt effective communication strategies to provide tourists with a comprehensive and engaging experience. Operators must have the ability to communicate effectively, be friendly, empathetic and understanding to create a positive relation with tourists, as well as the ability to tell stories and provide information in a clear, engaging and informative manner during visits. The ability to incorporate gamification and educational elements into tourism experiences can make the visit more engaging and informative. Operators should have the skills to create playful and educational activities that encourage learning throughout the visit, contributing to meaningful tourism experiences by stimulating positive emotions and deeper levels of engagement among tourists [2]. Authenticity and respect for history must be maintained throughout the process of developing these tourism experiences.

Considering the evolution of technology in tourism, several tourist-cultural institutions related to military history, such as interpretation centres and military museums, have invested in the use of technology to enrich the military tourism experience, namely using mobile applications, VR and AR, as mentioned. It is important that operators keep up with the updating and development of this technology. In some cases, tourists can relive historic battles through VR, explore interactive maps and access detailed information during their visit [18].

16.3 MOOC on Military Tourism Proposal

Given the unique nature of military tourism, the specific training of operators is vital to ensure they are equipped to provide high-quality experiences [19]. The sector's niche character demands a diverse skill set, centring on both practical application and theoretical comprehension.

In this sense, our proposal is the creation of a MOOC on Military Tourism aimed at professionals in the tourism sector who work or could work in Military Tourism in Portugal, with the aim of developing and promoting the unique and innovative Portuguese military tourism offer at national and international levels. To this end, we present a table with the structure of the course, designed to meet the skills needs of tourism technicians in the context of military tourism (Table 16.1). The course

has a duration and effort of 30 h and is made up of three modules: Module 1—Historical and Military Heritage, Module 2—Creation and Development of Military Tourism Products, Module 3—Communication in Military Tourism. Each module is composed of three specific topics, with written and audiovisual content, where the learning objectives are presented.

In this sense, assessment procedures and strategies need to be aligned with the learning objectives of each topic. Consideration should be given to creating quizzes or knowledge checks at the end of each topic to assess participants' understanding of the main concepts and facts presented in the course [20]. Practical tasks and small projects can be assigned that require learners to apply what they have learned. For example: for "Interpretation, narratives and storytelling", participants can choose a place to visit and develop a specific narrative for a particular audience. During the course, real or hypothetical case studies related to military tourism can be presented so that operators can analyse the situation, propose solutions and justify their recommendations based on the course content, using discussion forums to encourage critical thinking and reflection by asking open-ended questions. At the end, participants will be able to complete a comprehensive final project that integrates the knowledge and skills acquired throughout the course.

The MOOC on Military Tourism should be implemented in on the Portuguese platform NAU, a pioneering online project at national level in Portugal to support education and training for a wide audience. This is a service developed and managed by the FCCN Unit of the Foundation for Science and Technology, which allows the creation of courses in MOOC format [21].

Gamification elements can be introduced into each of the topics to make the learning process an interactive, engaging and rewarding experience. These features of gamification resonate with modern pedagogical theories that emphasise active learning, problem-solving and immediate feedback, thus fostering a deeper understanding and retention of the learnt material [22]. According to the Octalysis Framework, led by Yukai Chou, the gamification process takes place in four implementation phases of Discovery, Onboarding, Scaffolding and Endgame [23].

The initial "Discovery" phase is designed to capture the interest of participants and provide them with an intrinsic motivation to participate and learn. The subsequent "Onboarding" phase, while providing initial challenges, offers a comprehensive introduction to the game environment, ensuring that participants become aware of the rules and dynamics of the environment in which they will be operating. During the "Scaffolding" phase, the cultivation of knowledge and skills is incremental, fostering an environment that encourages continuous learning and interactive improvement. In the climactic "Endgame", participants are confronted with a comprehensive simulated scenario that brings all the skills and knowledge accumulated throughout the journey, providing a practical and integrative experience [20].

Our analysis suggests that this gamified approach provides an effective and engaging means of enhancing skills in the context of military tourism. It not only facilitates the acquisition of essential skills, but also creates a positive, collaborative and competitive learning environment [24]. However, as with any pedagogical paradigm,

Table 16.1 Proposal for the creation of a MOOC on military tourism

Modules	Topics	Learning objectives
M1. Historical and military heritage	M1/T1. Military structures	–Identify and understand the different types of military structures that exist in Portugal and classify them according to their historical context and purpose
		–Understand the strategic importance of military structures in different historical periods and regions
		–Relate specific military structures to significant historical events and conflicts, highlighting their role in shaping military history
	M1/T2. Interpretation, narratives and storytelling	–Develop skills in interpreting military heritage sites, including understanding their historical and cultural context
		–Learn how to create engaging narratives and storytelling techniques to convey the significance and stories behind military heritage and to tailor narratives for different audiences, including tourists, students and history enthusiasts
		–Discuss ethical considerations when interpreting military heritage, including dealing with sensitive issues and conflicts
	M1/T3. Protection and enhancing	–Evaluate the conservation needs of specific military heritage sites, including structural integrity, environmental impact and visitor management
		–Understand the concepts of restoration and adaptive reuse in the context of military heritage, including their benefits and challenges
		–Explore sustainable practices for the protection and enhancement of military heritage, considering environmental and economic factors
M2. Creation and development of military tourism products	M2/T1. Introduction, concepts and structuring	–Understand the concept of military tourism and its place in the tourism industry
		–Recognise the key stakeholders involved in military tourism, including government agencies, tour operators and heritage organisations
		–Learn how to structure military tourism products, including routes, itineraries, packages and tours, for different target audiences

(continued)

Table 16.1 (continued)

Modules	Topics	Learning objectives
	M2/T2. Experiences creation and management	–Develop the skills to create engaging and informative military tourism experiences that resonate with visitors and understand techniques for engaging visitors emotionally and intellectually through storytelling, interactive exhibits and immersive experiences
		–Learn how to manage safety and risk factors associated with military tourism experiences, including visitor safety during guided tours
		–Address issues of cultural sensitivity when designing experiences, including recognising the historical and cultural significance of military sites
	M2/T3. Operationalization	–Understand the logistical aspects of operationalizing military tourism products, including transport, accommodation and visitor services
		–Learn how to manage the financial aspects of military tourism operations, including budgeting, pricing and revenue generation
		–Explore effective marketing and promotion strategies for military tourism products and develop methods to ensure the quality and consistency of military tourism products and services
M3. Communication in military tourism	M3/T1. Digital content creation	–Learn the basics of media production to capture and communicate the essence of military heritage sites and gain skills in editing digital content for multiple platforms
		–Understand the principles of search engine optimization to increase the visibility and reach of military tourism content online
		–Understand copyright and licensing considerations when using multimedia content in military tourism communications
	M3/T2. Communication strategies	–Learn how to conduct audience analysis to tailor communication strategies to different demographics and visitor preferences
		–Explore strategies for effectively distributing military tourism content through websites, social media and other digital channels
		–Develop techniques for using storytelling to engage audiences emotionally and intellectually, fostering a deeper connection with military heritage

(continued)

Table 16.1 (continued)

Modules	Topics	Learning objectives
	M3/T3. Immersive technology	–Learn about key projects and locations where these experiences are being applied and gain an understanding of VR and AR technologies and how they can be applied to enhance military tourism experiences –Understand the importance of ensuring that immersive technology experiences are accessible to all visitors, including those with disabilities –Discuss the ethical and cultural considerations when using immersive technology at military heritage sites, including respecting the historical significance of the site

this approach should be subject to regular critical evaluation to ensure its continued relevance and effectiveness in meeting the evolving needs of the tourism industry.

The proposed gamified training approach, steeped in educational modernity, epitomises the fusion of technology and pedagogy, underpinned by a solid understanding of the capability needs within military tourism. Its multifaceted nature ensures a comprehensive response to these needs, highlighting the transformative potential of gamification in the field of professional development.

Military tourism is characterised by a diverse set of historical, cultural and geographical elements, requiring operators to demonstrate a level of expertise that can be effectively honed through a combination of formal education, technology-assisted learning and immersive experiences [25]. MOOC in military tourism should not be seen as a stand-alone project, but rather as an integral part of broader regional development strategies. This requires the establishment of collaborative partnerships between various stakeholders, including educational institutions, regional tourism bodies, intermunicipal communities, municipalities, museums, tourism agencies, technology companies and local communities. Together, these stakeholders can work to create an ecosystem that supports the growth of military tourism and the professional development of its operators [26].

16.4 Final Considerations and Future Work

The creation and proliferation of MOOCs play an important role in today’s society, particularly in stimulating lifelong learning, allowing citizens to acquire knowledge and skills throughout their lives. The way the content is delivered is the opposite of formal education. It allows professionals in each field to learn new subjects and improve their knowledge in order to stay relevant in a rapidly changing labour market.

In addition, MOOCs offer several advantages in terms of accessibility, flexibility and diversity of education, allowing anyone to access high-quality courses from any educational institution in the world, over the Internet, often for free or at affordable prices, at their own pace and on a wide variety of topics.

The creation of this MOOC has been designed to meet the needs of professionals working in the field of military tourism in Portugal, allowing them to develop their skills in this specific segment at their own pace, accessing the content according to their schedule and availability. The future work will include the evaluation of the MOOC by its users.

Military tourism presents a unique set of challenges that requires specific skills from operators to deliver exceptional experiences. Achieving a delicate balance between historical significance, cultural sensitivity and engaging storytelling is crucial in this sector. Operators need to have a deep understanding of military history, the context of conflict and the impact on local communities to create narratives that engages visitors while respecting the sensitivity of these sites.

Incorporating gamification strategies into training allows operators to understand complex historical details and effectively develop their storytelling skills, creating differentiated and dynamic experiences and effectively communicating the potential of Portugal's historical and military heritage.

By continually investing in developing and enhancing their skills and acquiring new knowledge, tourism professionals can ensure that they deliver exceptional military tourism experiences that leave a lasting impact on visitors, while respecting and promoting military heritage. Furthermore, it is crucial to foster a sense of cultural appreciation and understanding in military tourism. Military tourism is not just about battles, but about the people, societies and cultures affected by these historical events. Operators should pre-send narratives that bring out human stories and cultural nuances, encouraging tourists to understand history with nuance and empathy.

In this ever-changing tourism landscape, it is also essential to embrace continuous innovation and adaptation. Capacity enhancement should be seen as a dynamic and continuous process to keep pace with technological advances and evolving tourist expectations.

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Chapter 17

Cross-Border Tourism: A Residents' Perspective of the Iberian Meseta Reserve



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Abstract Tourism destinations depend deeply on the contribution of residents, who play a crucial role as stakeholders. Obtaining insight into their perspectives is crucial for the success of the tourism industry. Hence, this study aimed to understand how residents in the cross-border region of the Iberian Meseta Reserve perceive tourism in their land. From April to May 2023, a questionnaire was administered to residents aged 18 and above, selected from various locations such as shops, parks, restaurants, streets, and residences. A total of 470 valid questionnaires were collected and analysed descriptively, focusing on the means and standard deviations of the effects. An inferential analysis was conducted to determine the differences between the dependence on tourism, gender, and the tourism effects. The findings revealed that residents

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generally hold a positive perspective on tourism in cross-border areas. The economic effects ranked highest in mean perception, followed by the sociocultural effects, and lastly, the environmental effects. However, it's important to acknowledge a limitation of this study, namely the uneven sample size between residents from Portugal and Spain.

17.1 Introduction

In tourism research, residents' opinions hold great significance as they are crucial stakeholders in the development of tourist destinations [1, 2]. Investigating the relationship between residents and tourism is focused on the positive and negative effects of tourism both positive and negative and is imperative, as negative perceptions can lead to resistance and opposition towards tourism in the affected regions [3, 4]. However, research has revealed that residents often acknowledge the advantages of tourism, particularly the economic and sociocultural contributions it brings [1].

Cross-country tourism is particularly interesting, where visitors explore places that reside on the boundaries of different territories [5]. This form of tourism can substantially impact residents' lives and traditions [6]. In this sense, the present study focuses on localities in a cross-border region between Portugal and Spain, namely *Atenor*, *Bemposta*, *Bragança*, *Miranda do Douro*, and *Rio de Onor* (Portugal) and *Puebla de Sanabria*, *San Martín de Castañeda* and *Riomanzanas* (Spain). The strategy map for this low-density population region's protection was previously elaborated under the *Paisaje Ibérico* Project [7]. This region boasts several natural tourist attractions, including the *Douro River*, *Montesinho Natural Park*, *Vinhais Biological Park*, and *Arribes del Duero* [8]. Although the *Paisaje Ibérico* project has analysed the region's tourism offer, no study has focused on understanding residents' opinions about tourism, which is a justification for conducting this research. In this sense, this study aims to investigate the residents' perspectives in this cross-border area towards tourism, expanding the literature on the subject of residents' perceptions, which has already been studied in different tourist destinations around the world, and contributing to the understanding of residents in cross-border areas, where a gap was identified in the literature relating the two subjects.

To achieve this aim, the paper has been divided into five sections: introduction, theoretical framework, methodology, results, discussions, and concluding remarks. The theoretical framework centres on resident perceptions and cross-border tourism, while the methodology elucidates the study's approach. The results and discussions section presents the findings, while the concluding remarks provide a reflection on the study's limitations and recommendations for future research.

17.2 Theoretical Framework

The studies of resident perceptions concerning the impacts of tourism, encompassing economic, sociocultural, and environmental dimensions, have been a subject of considerable interest in tourism research. Such studies adopt various approaches, often investigating the influence of demographic factors such as age, gender, educational level, and length of residency in the researched location. These studies are conducted in diverse contexts, including events, destinations, and tourist attractions [1].

Initially, tourism studies predominantly focused on tourists and territorial aspects related to tourism [9]. However, since the 1970s, a noticeable shift has occurred, with increasing attention being directed towards understanding residents' perceptions of tourism development in global destinations. Other authors have shown that social and economic factors, residence place and economic dependence on tourism significantly influence their perception [10]. Similarly, there is a study in which it was observed that residents residing closer to areas experiencing high tourist flows tend to hold more negative perceptions of tourism activities [11].

Another analysis highlights the role of direct economic dependence on tourism in shaping residents' perceptions. People who are economically dependent on tourism are more likely to have a more positive perception of tourism [2, 10, 12].

The involvement of residents emerges as a critical factor in the success of a tourist destination [12–17]. Positive residents' perceptions can minimise conflicts and negative sentiments. While residents generally acknowledge the benefits of tourism, they are highly sensitive to its negative impacts. Residents who perceive substantial benefits tend to support tourism development, whereas those who identify few or no benefits may oppose it [18].

These analyses can also be conducted in cross-border areas. Several studies have been dedicated to understanding border tourism, a segment involving visits to places located on the borders of different territories [19]. Such destinations offer visitors the opportunity to explore the cultural, historical, and landscape differences and similarities between the bordering territories.

Cross-border tourism has the potential to bring economic, social, and cultural benefits to the destinations involved, such as generating employment, fostering trade and cooperation, enriching diversity, local identity, and promoting integration and peace among communities. However, it also presents challenges and issues, including unfair competition, exploitation, smuggling, trafficking, violence, pollution, and loss of authenticity [5, 20]. Ensuring that tourism benefits both residents and visitors, supporting sustainable development and preserving cultural traditions is of paramount importance. Therefore, understanding residents' perceptions becomes a crucial aspect of tourism planning [19].

17.3 Methods

17.3.1 Study Site

The research was carried out within the cross-border region that spans Portugal and Spain, specifically focusing on the *Trás-os-Montes* region in Portugal (Northeast Portugal) and the *Castilla y León* region in Spain (Fig. 17.1).

The cross-border area is distinguished by the presence of the Douro River and natural parks, which predominantly categorises it as a nature-oriented tourism destination. Comprising 87 municipalities on both sides of the border and encompassing five protected areas, this region boasts remarkable rural, monumental, and culturally significant heritage intimately intertwined with its ecological and natural attributes. Consequently, it attracts tourists across various domains, potentially yielding both positive and negative effects on the residents.

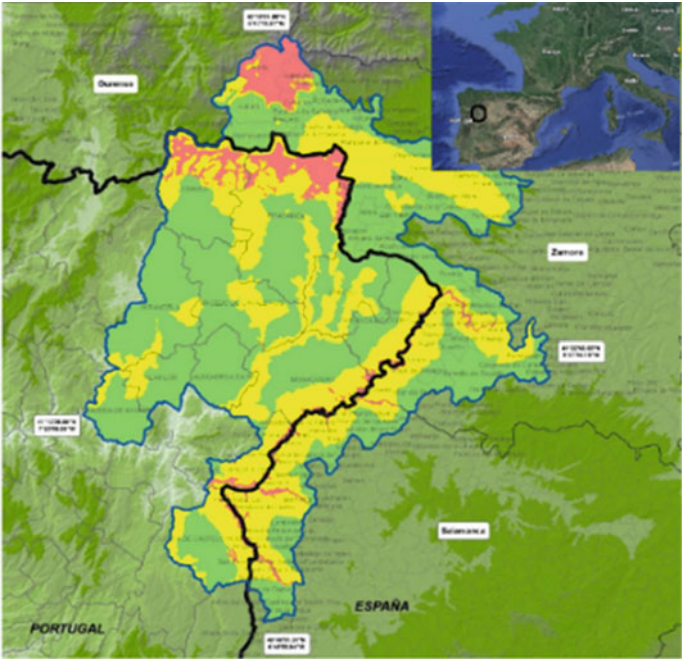


Fig. 17.1 Cross-border biosphere reserve Meseta Ibérica location [7]

17.3.2 Data Collection and Analysis

This study constitutes an integral part of the DuraDOURO project, a collaborative initiative involving a multidisciplinary team from both Portugal and Spain. The primary objective of this research was to collect data from eight distinct locations within the cross-border region, comprising five locations in Portugal and three in Spain (as illustrated in Table 17.1). A stratified sampling methodology was employed to ensure a comprehensive representation of the diverse characteristics inherent to each locality.

This approach considered each area’s single attributes and peculiarities, enhancing the study’s accuracy and reliability in capturing a holistic perspective of the cross-border region under research.

In the period from April to May 2023, a questionnaire was administered to residents aged 18 years old and above, employing a random approach to gather data from various locations, namely shops, parks, restaurants, streets, and residences. The study accrued a total of 470 valid questionnaires, which were subjected to subsequent analysis. With a confidence level of 95% and a margin of error of 4.0%, the sample size was deemed appropriate to represent the population under research. It is noteworthy that the sample aligns with previous international studies on the subject, particularly in line with Sharpley’s (2014) research.

Descriptive statistics were used to characterise the participants’ demographic features for the sociodemographic analysis. Furthermore, the mean and standard deviation of each statement were computed to assess the perceptions of the effects and their respective rankings. To ensure the reliability and validity of the measurement scale, Cronbach’s Alpha was applied. The internal consistency of the overall effects (0.878), economic effects (0.724), sociocultural effects (0.820), and environmental effects (0.630) was established, with all values exceeding the threshold of 0.6 [21]. This verification lends further credibility to the study’s measurement instruments and reinforces the robustness of its findings.

Table 17.1 Questionnaires applications per local

Local	Country	<i>n</i>	%
Atenor	Portugal	17	3.6
Bemposta	Portugal	25	5.3
Bragança	Portugal	203	43.2
Miranda do Douro	Portugal	61	13.0
Rio de Onor	Portugal	25	5.3
Puebla de Sanabria	Spain	106	22.6
San Martín de Castañeda	Spain	23	4.9
Riomanzanas	Spain	10	2.1
Total		470	100

Source Own elaboration

Considering previous studies that demonstrate that gender and tourism dependence are discriminators of the effects [22], this study formulated hypotheses to validate whether this reality also occurs in the analysed cross-border region. Thus, given that the statistical assumptions were met, the following six hypotheses were tested using the t-Student test.

H₁: There are differences concerning tourism dependence and the perception of economic effects.

H₂: There are differences concerning tourism dependence and the perception of sociocultural effects.

H₃: There are differences concerning tourism dependence and the perception of environmental effects.

H₄: There are differences concerning gender and the perception of economic effects.

H₅: There are differences concerning the gender and the perception of sociocultural effects.

H₆: There are differences concerning gender and the perception of environmental effects.

17.4 Results

17.4.1 *Sociodemographic and Professional Profile*

Concerning the participants' sociodemographic characteristics, a significant majority (61.1%) indicated that they were born in the municipality under study, suggesting a strong sense of rootedness among the residents in the region. The average duration of residency was calculated at 29 years, with a standard deviation of ± 23.731 , further supporting the notion of long-term attachment to the area.

In terms of gender distribution, the sample comprised a higher representation of women, accounting for 56.4% of the respondents. The average age of the participants was 46 years, with a standard deviation of ± 18.241 . Furthermore, a substantial proportion of the sample (71.2%) reported having attained secondary or higher education, meaning a relatively well-formed population. Additionally, most of the participants were married, constituting 51.3% of the sample.

As for the economic aspects, the average monthly income of the participants fell within the range of 760 € to 2160 € for 81.8% of the respondents. This data provides insights into the income distribution within the sample population.

Table 17.2 Effects' means

Effects	<i>n</i>	$\bar{X}$	<i>s</i>	Cronbach's alpha
<i>Economic</i>		3.63	0.654	0.724
Create jobs for residents	470	4.02	1.112	
Increase in prices of goods and services*	470	3.19	1.292	
Gives more visibility to the destination, attracting more tourists	468	4.34	0.875	
Job vacancies are occupied by people who did not previously reside in the destination	468	3.10	1.295	
Opportunities for local businesses	469	3.83	1.148	
Increases the residents' income	466	3.65	1.182	

Note *, Inversion of the items for calculating the global averages, by effect

17.4.2 Tourism Effects Perspectives

The mean score obtained for each effect statement (Table 17.2) demonstrates the highest overall mean to the economic effects (3.62 points $\pm$ 0.653), followed by sociocultural effects (3.49 points $\pm$ 0.422), and environmental effects (3.36 points $\pm$ 0.745). Notably, no effect means exceeded 4 points, like previous studies [23–25].

Analysing the individual mean scores for the effects, the statement with the highest mean score (4.34 points $\pm$ 0.875) refers to “gives more visibility to the municipality and can attract more tourists,” reflecting an economic effect. This finding aligns with prior research [26, 27]. Regarding sociocultural effects, the highest mean score was “promotes contact with different cultures” (4.18 points $\pm$ 0.911).

Similar to economic effect, the environmental ones are more noticeable to residents, as pollution and waste are evident daily. This finding is supported by a study conducted in Faro, Portugal [26], which highlighted negative economic and environmental effects as having the highest averages. In contrast, the cross-border region under study demonstrated lower average environmental effect scores than the other two categories. Nonetheless, it is essential to draw attention to the statement “increase in rubbish” (3.14 $\pm$ 1.302), which emerges as a concern among the residents in the analysed area (Table 17.3).

17.4.3 Hypotheses Validation

To determine if there is a significant difference between the effects means (Table 17.4) and the variables related to tourism employment and gender, the t-Student test was applied. As mentioned above, the statistical assumptions or applying the t-Student

Table 17.3 Effects' means (cont.)

Effects	<i>n</i>	$\bar{X}$	<i>s</i>	Cronbach's alpha
<i>Sociocultural</i>		3.49	0.421	0.820
Increase crime rates*	469	2.11	1.041	
Encourages residents to be more culturally active	470	3.80	0.990	
Promotes contact with different cultures	466	4.18	0.911	
Limits residents' access to leisure sites*	468	2.48	1.211	
Encourages local culture and handicrafts	465	4.05	0.971	
The quality of services is better	468	3.73	1.099	
Local people change their behaviour to mimic the tourists	468	2.43	1.186	
Increase the stress*	468	2.93	1.308	
More public investment in the cultural sector	467	3.64	1.127	
Increases traffic*	465	3.87	1.142	
Parking is difficult*	466	3.49	1.374	
Increase cultural offers	467	3.88	1.030	
Improve infrastructure and local facilities	465	3.71	1.072	
Increases public security *	466	3.19	1.139	
Increases the number of people circulating through shops, restaurants, hotels, and services	466	4.23	0.946	
Increases the sense of pride of the residents	466	3.98	1.032	
It is more difficult to preserve local values, customs, and traditions*	466	2.53	1.197	
Conflicts between tourists and residents*	464	2.23	1.129	
<i>Environmental</i>		3.36	0.735	0.630
Generates excessive noise*	468	2.68	1.218	
Increase in air and water pollution*	467	2.67	1.261	
Provides consciousness for the preservation of natural areas	466	3.55	1.089	
Increase in rubbish*	468	3.14	1.302	

(continued)

Table 17.3 (continued)

Effects	<i>n</i>	$\bar{X}$	<i>s</i>	Cronbach's alpha
Decreased water supply *	464	2.69	1.253	
Infrastructure and visits to natural areas are improved	465	3.77	1.050	

Note *, Inversion of the items for calculating the global averages, by effect. *n* = sample; $\bar{X}$ = mean; *s* = standard deviation

Source Own Elaboration

Table 17.4 Effects' means per variable

		Effects			
		<i>n</i>	Economic ($\bar{X} \pm s$)	Sociocultural ($\bar{X} \pm s$)	Environmental ($\bar{X} \pm s$)
Tourism employment	Yes	146	3.82 (± 0.652)	3.47 (± 0.460)	3.16 (± 0.832)
	No	324	3.54 (± 0.636)	3.50 (± 0.403)	3.44 (± 0.670)
Gender	Female	265	3.63 (± 0.602)	3.47 (± 0.418)	3.29 (± 0.747)
	Male	201	3.62 (± 0.712)	3.51 (± 0.429)	3.43 (± 0.703)

Source Own Elaboration

test was fulfilled. The null hypothesis was rejected when the *p*-value was less than the significance level (*p*-value < 0.05).

The hypothesis test supported H_1 , indicating differences in means concerning the tourism employment and economic effects, signifying that residents that work/ worked in tourism tend to be a higher perception of economic effects (3.82 points ± 0.652). The hypotheses related to tourism employment and sociocultural and environmental effects were not supported (H_2 , H_3). Related to gender, the economic and sociocultural effects did not show significant differences (H_4 , H_5). However, the hypothesis relating gender and environmental effects was supported, suggesting that men tend to have a higher perception of these effects in the studied region (3.43 points ± 0.703) (Table 17.5).

17.5 Discussion and Conclusions

17.5.1 Main Findings

This study examined the residents' perspectives towards cross-border tourism in Northern Portugal, namely in the regions of Terras de Trás-os-Montes (Portugal) and Castilla y León (Spain). It is worth noting that various locations around the world have already researched to gather the thoughts and perspectives of their residents. Nonetheless, this is the first study conducted in this cross-border region and

Table 17.5 Inferential statistics

Hypotheses	<i>p</i> -value	Result
H ₁ : There are differences concerning tourism dependence and the perception of economic effects	< 0.05	Supported
H ₂ : There are differences concerning tourism dependence and the perception of sociocultural effects	> 0.05	Not supported
H ₃ : There are differences concerning tourism dependence and the perception of environmental effects	> 0.05	Not supported
H ₄ : There are differences concerning gender and the perception of economic effects	> 0.05	Not supported
H ₅ : There are differences concerning the gender and the perception of sociocultural effects	> 0.05	Not supported
H ₆ : There are differences concerning gender and the perception of environmental effects	< 0.05	Supported

Source Own Elaboration

provides insights into the residents' perspectives towards tourism activity. It should be mentioned the characteristics of low population density and economically fragile regions where tourism is vital.

The results from the research showed that residents tend to perceive tourism positively in the cross-border area. In the literature, it is a common trend that economic effects are more prominently perceived [26, 27], given their tangible nature and ease of measurement by residents. Moreover, it becomes evident that in the border region under research, the mean score for economic effects (3.63 points $\pm$ 0.654) surpasses that of sociocultural and environmental effects. One of the key reasons behind this observation in the region is its geographical attributes, which make tourism a significant economic activity, leading to increased job opportunities and enhanced income for the residents.

Cultural aspects play a vital role in studies on residents' perceptions, a tendency corroborated in the context of Brazil [25]. Notably, it should be acknowledged that, according to the literature, the statement "increases the number of people circulating in the destination" could be considered a negative aspect. However, given the characteristics of the cross-border region, residents perceive the influx of more tourists positively, indicating the growth of tourism in an area with limited prior exposure to tourism activities and relatively low effect from overtourism. Furthermore, the perception of the statement "increases crime" as the least significant sociocultural effect is likely linked to the region's current state of security. Finally, the results related to the economic effects are similar to the studies conducted in other regions, where these are the statements with lower mean [26].

Concluding, the hypothesis test validated what has already been highlighted in the literature, demonstrating that residents who have an economic relationship with tourism tend to have a higher perception of the economic effects of tourism [22].

17.5.2 Theoretical Implications

Some theoretical implications can be presented with this study, once exploring the factors that influence positive or negative attitudes can provide valuable insights into community acceptance of tourism and its potential effects on residents' quality of life. Residents' perspectives play a crucial role in shaping the destination's image and identity. The study can shed light on how tourism development influences residents' perceptions of their community and how they perceive their cultural heritage and natural resources in the context of the cross-border tourism, an area still under-explored in the literature. This knowledge can be vital for managing tourism in a way that aligns with the destination's identity and fosters a sense of pride among residents.

Related to the cross-border tourism studies, understanding residents' perspectives on both sides of the border can shed light on the complexities of cross-border interactions and highlight the potential for cross-border collaboration and cooperation in tourism development.

17.5.3 Practical Implications

Some practical implications of this research are related to stakeholder engagement, tourism planning and management, marketing and promotion, community capacity building and sustainable tourism development. In other words, this study provides invaluable direction for creating a sustainable and mutually beneficial relationship between tourism and the local community. It allows for an inclusive and participatory approach to tourism development, ensuring that residents' opinions are gotten and considered in decision-making processes. In other words, bearing in mind the residents' opinions is crucial in the planning process.

17.5.4 Limitations and Future Studies

One potential limitation of this study examining residents' perspectives on tourism concerns the sampling method. While the researchers employed a random selection process across a variety of venues, including shops, parks, restaurants, streets, and residences, there exists the possibility that the sample group may exhibit certain biases based on geographic or socioeconomic factors. Furthermore, the study's restricted focus on a specific time, such as April and May of 2023, may not provide a comprehensive understanding of how tourism patterns vary seasonally or due to other relevant factors.

Another limitation of the study is the subjectivity of residents' responses when answering the questionnaire. Residents' perceptions may be influenced by response

bias or memory, leading to potential inaccuracies or biases in evaluating their perceptions of the effects of tourism. Additionally, relying on self-reported responses could result in limitations in the representativeness of the sample and the generalisability of the findings to the entire resident population, as non-response is a possibility in questionnaire-based studies.

Furthermore, the results of the study may lack objectivity due to the dependence on self-reported data and the lack of external validation. Future research could complement the existing study by using additional methods such as conducting in-depth interviews or analysing secondary data to address these limitations. This would strengthen and confirm the residents' perceptions of tourism in the study area, thereby enhancing the overall validity and reliability of the study's findings.

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Chapter 18

The Impact of Work-Life Conflict on Employees' Emotional Well-Being and the Adoption of Quiet Quitting—A Study Case Applied to the Portuguese Hospitality Industry



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Abstract The present paper aims to understand the relationship between work-life conflict, emotional well-being, burnout, and the recently emerged quiet quitting phenomenon. Considering the importance of understanding quiet quitting antecedents and outcomes, as well as its relation with the above-mentioned variables, the authors propose a study within the Portuguese hospitality industry aiming to better understand this new phenomenon. Hospitality is especially vulnerable in what concerns to human resources practices and employee' well-being, and considering its contribution to the economy and its long-lasting difficulties in retaining talent. Bearing this in mind, the present work seems to have several contributions, being this, to our knowledge, the first study relating these four concepts, in Portugal, and, specifically, within the hospitality industry. The theoretical framework covers four important constructs: work-life conflict, emotional well-being, burnout, and quiet quitting. Results from the literature review suggest a negative relationship between work-life conflict and well-being. Conflicts are correlated with increasing burnout. It is also recognized that employees may adopt quiet quitting behaviors, in order to protect themselves from burnout and to improve their work-life balance. This work

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contributes to the literature by identifying some key risk factors that can foster quiet quitting.

18.1 Introduction

It is widely known that hospitality industry has been facing several problems in what concerns to Human Resources Management. Due to atypical working schedules, which includes rotating shifts and working on weekends and holidays, employees will have a bigger difficulty in effectively managing both work and personal life domains, lacking time for their leisure, frequently experiencing work-life conflict. This interrole conflict can have a negative impact on employees' emotional well-being, increasing anxiety, stress, and burnout experiences.

In the wake of the Covid-19 pandemic, a new workforce, setting new priorities has emerged. The pandemic brought undeniable changes to the workforce, changing the way employees see life and work. Some disengaged workers join two emergent phenomena: the Great Resignation, and months later, quiet quitting. Quiet quitters deliberately limit their efforts and availability at work, which, according to most authors can be justified by lack of motivation and disengagement and as a way employees adopt to protect themselves from burnout and to achieve a better work-life balance.

Considering the importance of understanding quiet quitting antecedents and outcomes, as well as its relation with work-life conflict, emotional well-being, and burnout, we propose a study within the Portuguese hospitality industry aiming to better understand this new reality.

The post-pandemic overtired workforce, with different work and life priorities, is demanding more from employers: Workers are valuing work-life balance more than ever as well as their own well-being. This could represent an additionally hard challenge for hospitality managers, in a sector where burnout levels are tremendously high and work-life balance is especially hard to achieve. Several authors enhance the lack of quality work environments in hospitality, stating that they are not supportive for employees' work-life quality, as they promote emotional exhaustion, depersonalization, and limited personal accomplishment [1, 2]. In the current context, workers are not living to work, and not available to give up leisure. They are prioritizing their well-being and establishing a better work-life balance, this, sometimes, requiring a reduced work productivity, making them to engage in quiet quitting, keeping on performing the minimal tasks required and avoiding extra efforts [3]. The present paper aims to understand the existing relationships between work-life conflict, emotional well-being, burnout, and quiet quitting.

18.2 Work-Life Conflict

Managing work and non-work domains is a great challenge for organizations as it impacts psychological, physical, and behavioral health [4]. The modern working environment is demanding, as it is expected that employees balance multiple roles while keeping on working with maximum productivity [5]. Furthermore, work is currently seen as an instrument to support a lifestyle and ensure optimal conditions for the individual's personal life [6], this being an indicator of the new workers' priorities and the importance of work-life balance for them. When the energy, time, and demands of work interfere with the personal sphere and its inherent roles, work-life conflict arises, work and family spheres become incompatible: It becomes harder to perform one of the roles because of what the other one requires [7, 8]. Work-family conflict is "the extent to which experiences in the work (family) role result in diminished performance in the family (work) role" [9, p. 65]. According to the authors, this definition assumes that WFC represents "cross-role interference in performance": When an individual sacrifices time or energy devoted to one domain because of the other, the performance in this last will be reduced. It is "a form of interrole conflict that occurs when workers are exposed to high job demands exhausting their valuable resources such as energy and time and making them incapable to meet their professional role and to have adequate leisure activities" [10]. There are four main mechanisms of conflict that justify different kinds of interference: time, strain, behavior, and energy. Time-based conflict occurs when time applied to one domain prejudice time available for the other domain and its related responsibilities; stress-based conflict—occurs when stress resultant from one domain, makes it harder to perform and accomplish responsibilities on the other domain; behavior-based conflict—arises when behavior in one of the domains becomes incompatible with the other domain requirements; energy-based conflict—arises when energy devoted to one domain reduces energy available for the other domain [7–9].

Employees' overall well-being suffers a negative impact from conflict between life and work domains [11]. It can bring health-related consequences, impacting both mental and physical health, self-reported general health, health-related behavior, sleep quality [12], family well-being, and emotional well-being [7, 13]. It increases anxiety, one of the main risk factors for burnout [14]. Besides that, it affects also organizational outcomes, such as productivity and turnover [7, 13].

Although it can be a problem for several workers, it is especially pernicious for hospitality workers due to non-standard working hours, the lack of sufficient human capital allied with low wages and limited benefits [15]. In the hospitality industry, there are some risk factors that influence employees' well-being, such as high workload and pace of work, low remuneration, insecurity, and instability regarding the employment situation, low possibilities of career advancement or promotion, lack of resources, and low level of support are some of the recurring problems in the sector [16]. Hospitality workers also deal with reduced leisure time to spend with family and friends, which, besides instigating work-life conflict, generates a sense of fatigue and negatively affects their motivation to engage in customer service work

[17, 18]. In fact, they are usually unable to achieve a desired work-life balance. Due to that reality, they are more prone to stress at work as well as outside work, this leading to conflicts in both domains and problems in their relationships, which will impact negatively their mental and physical health [19]. Moreover, they often provide services to customers on their holidays, which can increase their frustration, emotional stress and disengagement, especially when they are not assured their own leisure time, due to work-life imbalance.

Work life conflict can endanger emotional well-being, increasing anxiety and frustration [20], strain, resources depletion [5] and fatigue [17]. The lack of leisure will also affect psychological well-being [21].

18.3 Emotional Well-Being (EWB)

Due to its scope and complexity, it is not easy to find a concrete definition for emotional well-being. Emotional wellness is the capacity to successfully manage life's stresses, cope, and adapt to change and difficult times [22]. It is a positive mental state, by which individuals are able to handle their emotions within life activities [23]. It can be simpler defined as the emotional quality of individual's experiences [24] or as the capacity to generate positive thoughts and to cope with adversity and stress [25]. EWB is as a measure of emotional vitality and good feelings that allows individuals to feel good and energetic, experiencing high levels of positive affect. It embodies satisfaction with relationships, the subjective perception of social support [26]. EWB is, in fact, an umbrella term for several psychological concepts and a multi-dimensional composite, comprising life satisfaction, life purpose and positive emotions, psychological well-being, thriving and subjective well-being [26, 27]. As the name suggests, it is centered on emotions: among their EWB dimensions there are positive emotions and moods (e.g., happiness); absence of negative emotions, moods, and states (e.g., stress, sadness, loneliness) [26]. It is not mandatory that there is an absence of negative effects, but a predominance of pleasant effect (positive affect) over unpleasant effect (negative affect) in the individuals' life overall perceptions (past, present, and future) [28].

Emotional well-being influences the quality of relationships and the ability to give and receive love (self-love and for others), so the lack of it will endanger relationships [29]. High levels of EWB are also favorable for recovery and survival of physically ill patients [30]. In the same way, positive affect is beneficial for the immune and cardiovascular systems and for stress reduction [30]. Additionally, individuals reporting high levels of SWB are more likely to be more successful than their peers and to hold better social relationships [31], more probable to secure job interviews, to have better evaluations at work, to handle with job requirements in a better way, showing good performance and productivity, being unlikely to show counterproductive workplace behaviors and job burnout [32]. Individuals with high levels of EWB are expected to be stable, confident, and able to cope, and to show empathy for others [33]. When individuals understand their own emotions, learning from them and coping through

them, they will achieve a positive emotional state that will foster success. EWB has a positive role on individual's mental health and overall well-being: It controls the health-seeking behavior, while increasing decision-making skills, improving interpersonal communication, and helping to recover from stressful experiences or illness [23].

18.4 Burnout

Burnout is an occupational phenomenon that can be described as a syndrome resulting from chronic workplace stress that has not been successfully managed [34], comprising three main dimensions—people feel emotionally and physically overextended, drained, tired, with lack of energy; cynicism—people adopt a cold, distant attitude toward work and the people on the job, lack of involvement; and ineffectiveness or reduced professional efficacy—people feel a growing sense of inadequacy, overwhelming, with lack of confidence [35]. It is a state of mental fatigue conveyed with mental stress preventive from the work environment, a delayed answer to chronic stressors, also more common in people-related professions [36]. The prevalence of burnout is quite high in service industries. This can be explained by the phenomenon of chronic labor shortage, work and function overload, long working hours, and pressure from superiors and colleagues. In addition, the high contact with customers and often the management of complaints may also be explanatory factors [37, 38]. Burnout is more likely to arise when there is a great mismatch between the nature of the job and the nature of the person who performs it. This mismatch between the person and the job can be characterized by: work overload; lack of control; lack of reward; lack of community; lack of fairness; value conflict [35]. It is mainly caused by work stress, intense work environment, excessive workload, or hostile working environment [39]. Also, interpersonal conflicts, with clients, colleagues, or managers, increase the burnout risk significantly, acting as a stimulator [40].

As widely studied, burnout carries several costs, not only for people's health, but also for the organization. It increases physical problems (headaches, gastrointestinal illness, high blood pressure, muscle tension, chronic fatigue), mental distress (anxiety, depression, sleep disturbance), issues at home (exhaustion and negative feelings that can affect relationships with family and friends) [35], leading to physical, emotional, and mental fatigue [39]. There are costs for the job as well, individuals who experience burnout may adopt negative attitudes toward work: drops in performance and commitment, dedication decrease, inhibition of creativity and innovation, work accidents, absenteeism, withdrawal intentions, and physical and mental illness [1, 2, 38, 41, 42]. Besides the individual harmful consequences, burnout can affect interpersonal relations as well: Burned out employees can be seen as a burden for their coworkers as they can promote work delays or overburdening the colleagues with work, they are not capable to handle due to emotional exhaustion [1]. Likewise, people's experience at work influences their lives outside work. High levels of burnout may result in difficulty to accomplish family duties.

Even though burnout is a global hazard, it is especially significant in the hospitality industry, considering the existence of favorable factors for its manifestation: excessive workload, long atypical working hours, unpredictable shiftwork, taxing employees' emotional and physical capabilities, all these mentioned factors can justify emotional exhaustion, high work-related stress and intention to quit [1]. Burnout rate of hospitality workers is tremendously high, one of the highest of all industries: It is estimated that one in seven hotel and restaurant workers suffers from burnout [43]. Besides all the general health and organizational outcomes, it can also "undermine customer loyalty" as staff is not providing the best quality service to the customer [44]. Customers unfair treating causes emotional exhaustion and the prolonged aggressive leadership promotes psychological distress and increases turnover intentions [1]. Hotel employees are overtired and emotionally exhausted due to the various above-mentioned job stressors, which can lead to voluntary turnover [36].

18.5 Quiet Quitting

With the pandemic, workers got the chance to "slow down and re-evaluate their lives by questioning how they were spending their time and what moments they were missing out on by themselves and with their loved ones" [46, p. 3]. The pandemic had indeed harsh impacts on employees' health, finance, and well-being [46]. It affected not only employees' mental health but also their job security and perception of work and life placement [45]. Although there were pre-existing workforce problems in hospitality, the pandemic crisis intensified fragilities. The fact that hospitality employers were only worried about the customers and in creating a secure environment to welcome them back, neglecting once again employees' needs and fears, was another dissatisfaction cause [46]. In the wake of the pandemic, some disengaged workers joint two emergent phenomena: The Great Resignation, and months later, quiet quitting. There is no consensual definition for quiet quitting. It is a mindset whereby employees decide to deliberately limit their efforts in what concerns to work activities, avoiding volunteering to extra tasks or to exceed the pre-established expectations. By doing that they are able to maintain their employment status and, at the same time, they are prioritizing their well-being and work-life balance [47, 48]. Quiet quitters are less psychological invested in their work, choosing to continue fulfilling their primary responsibilities, but avoiding going beyond by refusing or simply ignoring extra efforts/activities such as staying late, showing up early or attending non-mandatory meetings, those being usually defined as citizenship behaviors [48]. Some indicators of quiet quitting are disengagement on a chronic basis; performance only to the minimum set of performance standards; isolation from other members of the team; withdrawal from any non-necessary conversations, activities or tasks; attendance at meetings but not speaking up or taking action; and teammates report a sudden increase in their workload in having to pick up the slack [49]. Quiet quitters deny the idea that "work should be at the heart of the personal

life,” rejecting the hustle culture and fighting to recalibrate their disturbed work-life balance and to reclaim their endangered well-being, dedicating more time to other meaningful things to them. Quiet quitters show a low psychological commitment and a lack of engagement; they are re-prioritizing their efforts according to their values, looking for more autonomy, independence, flexibility (e.g., remote work opportunities) in order to better balance their time between work and non-work activities, family time, or personal projects [50]. A matter of concern in quiet quitting is that it can be contagious within the business and organization, leading to severe decreases in productivity, motivation, quality of work and customer satisfaction, as well as increased absenteeism [39]. Organizational disengagement, decreased performance, absenteeism, presenteeism, bore-out syndrome, discomforting coworkers, unethical behaviors, organizational corruption, perceived organizational injustice, counterproductive work behaviors, devastating corporate reputation and brand image, decreased well-being, undeveloped skills, and job loss [51]. In what concerns to positive consequences, employees may have the chance to improve their mental state and personal life. Surprisingly, some (quiet quitters) experienced a positive impact on their career, which can be justified by the increasing sense of pleasure and fulfillment with the job, after engaging in quiet quitting [47]. While improving their work-life balance, employees reduce stress and anxiety [52], which can reveal that employees are adopting QQ as a strategy to protect their well-being or to relieve an overburdened mind.

18.6 Conclusion

Several studies concluded that work-life conflict negatively affects employees' psychological well-being [5, 11, 53, 54]. Specifically speaking about burnout, work-life conflict is proven to positively contribute to burnout [21, 55, 56], negatively affecting leisure participation and well-being [57] with those with high work-life balance tending to experience lower levels of burnout [3]. It is proved that conflict can trigger burnout, while affecting work productivity and the quality of people's life, as individuals that are unhappy with the job and workplace environment may experience work-life conflicts and the continuity of conflict may foster burnout. It is also clear that employees are re-prioritizing their efforts accordingly to their values, seeking more autonomy and remote positions to achieve a greater independence and flexibility to spend more quality time with family and friends or work on side projects [58]. Workers are not living to work, and not available to give up leisure. They are prioritizing their well-being and establishing a better work-life balance, this, sometimes, requiring a reduced work productivity, making them to engage in quiet quitting, keeping on performing the minimal tasks required and avoiding extra efforts [59].

In the same vein, several authors are suggesting that employees are adopting quiet quitting to avoid burnout, protecting their well-being while achieving a desirable work-life balance [3, 47, 50–52, 57, 58, 60]. Besides that, we can assume that some

quiet quitters are already suffering from burnout and to mitigate its effects engage in quiet quitting: Cynicism and depersonalization behaviors are common on quiet quitters, as they reveal a detached attitude and a cold behavior. Due to high work stress and a resulting emotional exhaustion, workers choose to reduce their efforts to avoid sources of work stress and by that protecting their own well-being [45]. Emotional exhaustion can also lead to disengagement and depersonalization that will motivate quiet quitting attitudes [58]. Recent studies, performed within the health sector, showed that higher levels of burnout are positively related with higher levels of QQ [52, 59].

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Chapter 19

Reviving the Templar Tale: Proposal for the Creation of an Immersive Experience Through the Templar Heritage of Tomar



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Abstract The aim of this paper is to advance the theoretical discourse on the enhancement of cultural heritage in tourism by presenting an integrative framework for the development of immersive tourist experiences. Using the Templar heritage of Tomar as a case study, this research employs a qualitative methodological approach to identify and inventory tangible, intangible, and natural resources related to the Templars. Subsequently, the paper conceptualizes a mobile application using geolocation, augmented reality (AR), and artificial intelligence (AI). This application is designed to bring together all the catalogued Templar heritages in an interactive, gamified experience, thereby addressing the tourism management requirements of personalization and differentiation. A multi-disciplinary analysis incorporates historical, cultural, symbolic, and touristic perspectives, enriching the visitor's engagement with the Templar narrative. The final product is conceived as a tool for cultural preservation and as a strategic lever for strengthening the positioning of Tomar as a unique and exemplary Templar tourist destination.

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19.1 Introduction

Tourism infrastructure and its strategic design are crucial for transforming a geographical area into an alluring destination. This meticulous orchestration of routes and itineraries can stimulate a plethora of advantages, ranging from fortifying the local economy to buttressing cultural and environmental conservation [1].

This paper aims to operationalize the theoretical constructs of immersive experiences within the framework of heritage tourism. Focusing on the Templar legacy in Tomar, the research seeks to catalogue its diverse cultural, historical, and natural assets while proposing a gamified visitor experience enhanced by innovative technologies. Recognizing the untapped potential of tourism helps to preserve and promote the rich cultural and historical heritage of an area, thereby fostering a sense of community ownership of locally significant traditions and heritage [2]. Moreover, the valorization of cultural heritage serves as a catalyst for broadening the spectrum of potential visitors, thereby fostering cross-cultural exchange and creating an environment ripe for mutual cultural appreciation [3].

This multi-faceted approach to curating tourism experiences aims not only to boost local economies through increased visitor spending, but also to support cultural and environmental preservation efforts. This contributes to a sustainable, dynamic, and holistic tourism industry [4].

Immersive experiences are designed to engage visitors profoundly, transcending mere touristic sightseeing to stimulate emotional, intellectual, and sensory faculties. This heightened level of engagement facilitates a more authentic connection between the visitor and the cultural essence of the destination [5]. Such immersive experiences, when meticulously crafted, can significantly enrich visitor interactions, thereby attracting a larger visitor pool, stimulating economic gains, and promoting sustainable cultural development. These benefits collectively enhance a destination's reputation as an enriching and memorable locale [6].

In a market increasingly congested with competing destinations, it is the distinct, immersive experiences that captivate and retain visitors [7]. Enriched experiences that prioritize local culture, historical heritage, and sustainability empower destinations to foster more responsible and conscious tourism. It is essential to rigorously assess and mitigate any environmental, social, and cultural repercussions to ensure equitable benefit distribution and a universally positive tourism experience [4]. Investing in innovation and technology is indispensable for crafting these immersive experiences, serving as a stimulant for local tourism industry development.

With the Templars' seminal influence during the Middle Ages in Europe, particularly in pioneering intricate commercial networks and introducing ground breaking business practices, they offer a fascinating thematic core for a unique tourism experience. The work "Performance, Innovation Modes and Territorial Embeddedness" emphasize the role of the local environment—or "territorial embeddedness"—in fostering innovative performance [8].

The enduring allure of the Templars lies in their complex history, architectural marvels, and the cloud of myths surrounding them. This multi-faceted appeal makes

them an optimal focus for thematic tourism experiences [9]. The subsequent sections of this paper will delve into our specific methodology, elaborate on the theoretical frameworks relevant to our study, discuss the potential challenges and opportunities, and finally, outline our key recommendations.

19.2 Methodology

The overall objective of this research is to explore the unique potential for tourism experiences, anchored in the city's Templar heritage. This encompasses both elevating Tomar's appeal to tourists and contributing to the conservation and promotion of the Templar legacy.

The case study methodology will be used as a research framework to identify the various Templar assets in the city. Documentary analysis was used to gain a comprehensive understanding of both the tangible and intangible Templar assets. The Qualitative Data Analysis method involved coding the textual data, categorizing the codes into themes related to historical relevance, cultural significance, and tourist potential, followed by a narrative synthesis.

A meticulous review of the existing literature provided a nuanced insight into the influence of the Templars on the socio-cultural fabric of the city over the years. This literature review involved the interpretation of primary sources such as manuscripts, legal documents, and architectural plans, as well as secondary sources such as scholarly articles and books. The insights gained were then integrated into the research findings in order to contextualize the identified Templar resources historically and culturally.

Tangible resources—such as buildings, monuments, and artefacts—were assessed based on a set of predetermined criteria, including historical relevance, significance, state of conservation, accessibility, and tourist potential. These criteria were selected following a review of best practices in heritage conservation and tourism research. Intangible resources such as legends, myths, and local narratives were examined for their potential to enhance the visitor experience and establish a deeper connection with the Templar heritage.

The study aims to provide a multi-faceted tourist experience by exploiting the city's unique Templar heritage. The chosen criteria for evaluation are based on both heritage conservation standards and current tourism trends and aim to strike a balance between preserving the city's historical essence and boosting its tourist appeal. Our research aims to identify the most important Templar heritage sites in Tomar, Portugal, in order to develop an engaging tourism experience.

The methodology consists of a review of the academic literature on Templar history and heritage tourism [10, 11]. The research also conducted on-site evaluations of the selected heritage sites, namely by assessing factors such as their current state of preservation, security measures, accessibility, ticketing, and existing facilities. The aim was to evaluate the sites for their potential to be integrated into a larger tourism experience. Criteria for site selection were determined based on historical

significance, architectural value, and overall suitability for tourism. The data were mainly collected from the websites of the *Sistema de Informação para o Património Arquitetónico* (SIPA) [12] and *Direção-Geral do Património Cultural* (DGPC) [13] databases, where a qualitative analysis was carried out. These institutions are the main sources of information on Portuguese architectural, urban, and landscape heritage.

19.3 Tomar: A Historical and Touristic Case Study in Templar Heritage

Tomar is located in the central region of Portugal, specifically in the Santarém district, Médio Tejo. It has been identified as a city with deep ties to the Templar heritage that dates to the medieval era [14]. The focus of this section is to explore Tomar not only as a Templar heritage site but also as a tourism offering with a range of attractions beyond the Templars.

The city served as a strategic fortress and headquarters for the Templar Order, gaining historical and cultural prominence over the years [15]. While the Templar history forms the core of Tomar's identity, it also has other elements worth noting, such as its architectural diversity and community engagement in preserving history. Among the city's prominent attractions, the Castle of the Templars and the Convent of Christ stand out. Both have been recognized for their historical and architectural significance, with the latter being a UNESCO World Heritage Site [16]. These landmarks are often featured in tourist itineraries and scholarly discussions, reflecting their multi-faceted importance [17].

Beyond its Templar ties, Tomar is replete with other cultural assets like churches, museums, and cobbled streets that reveal the city's rich history [18]. The architecture ranges from medieval to Renaissance and Baroque, showing the stylistic evolution of the city over centuries. According to various travel reviews and cultural journals, Tomar's warm and hospitable environment adds a unique layer to its appeal. This is an observation supported by tourists' testimonials that speak to the welcoming nature of the city's inhabitants [10].

Creating immersive tourist experiences is a part of Tomar's strategy to promote and preserve its heritage. This is supported by studies that highlight the importance of experiential tourism in historical preservation [11]. These experiences encourage tourists to engage more deeply with the city, thus supporting the preservation of its rich cultural history [10].

Various initiatives have been spearheaded to celebrate and enhance the Templar heritage. These range from annual events like the Templar Festival to unique activities such as Templar camps organized by local history enthusiasts [19]. In 2016, the Templars Route European Federation association (TREF) was created, an initiative founded by Aube (France), Tomar (Portugal), Ponferrada (Spain), and Perugia (Italy) [20]. Between 2020 and 2023, Tomar assumed the presidency of TREF and guided several initiatives [20]. The Templar Route project, launched in 2020, adds

another dimension to Templar tourism. Covering various municipalities, it is aimed at becoming a well-recognized tourism product [21]. The Municipality of Tomar has also invested in curating Templar-themed tourist routes, and the recently inaugurated Tomar Templar Interpretation Centre is a testament to this commitment [22]. This centre uses modern technology and sensory experiences to enrich visitor understanding of the Templars.

Tomar's international allure is not solely based on its Templar history but also on its capacity to offer immersive experiences. By effectively capitalizing on its rich past, the city not only preserves its history but also provides varied and enriching experiences for tourists [23].

19.4 Unveiling the Templar Legacy: Key Attractions and Cultural Significance in Tomar

The research involved the identification and analysis of the material, immaterial, and natural Templar heritage of Tomar. After conducting on-site evaluations and a qualitative review, the research identified the most crucial heritage sites from both a historical and tourist standpoint. These include landmarks such as the Castle of Tomar, the Convent of Christ, and others, as outlined in Fig. 19.1.

Each site offers visitors the opportunity to explore the history of the Templars, their architectural innovation, and the spiritual significance they gave to their structures, enriching the experience with layered historical narratives and cultural depth. Ensuring that the interpretation of these sites is historically accurate and engaging for a broad range of visitors requires careful planning and execution. One of the research challenges is to balance heritage conservation with the requirements of modern tourism. This includes considerations for safety, accessibility, and ticketing, among other factors. Sustainable tourism management practices are vital in this context.

The objective of this study is to serve as a foundational element for the creation of an engaging, gamified Templar Experience in Tomar. These sites are key components in the creation of this experience, providing a rich context and history of the city's relationship with the Knights Templar. The aim of the experience, which links these key points, is to offer a tangible narrative of the Templar legacy that can be explored and experienced today. Creating a Templar Experience in Tomar offers a transformative journey into the Templars' glorious past, revealing their strategic strength, religious devotion, and enduring influence. This exceptional experience, interwoven with centuries of history and mysticism, consolidates Tomar's place as a key destination for those wishing to discover the remarkable legacy of the Knights Templar and Portugal's maritime heritage.

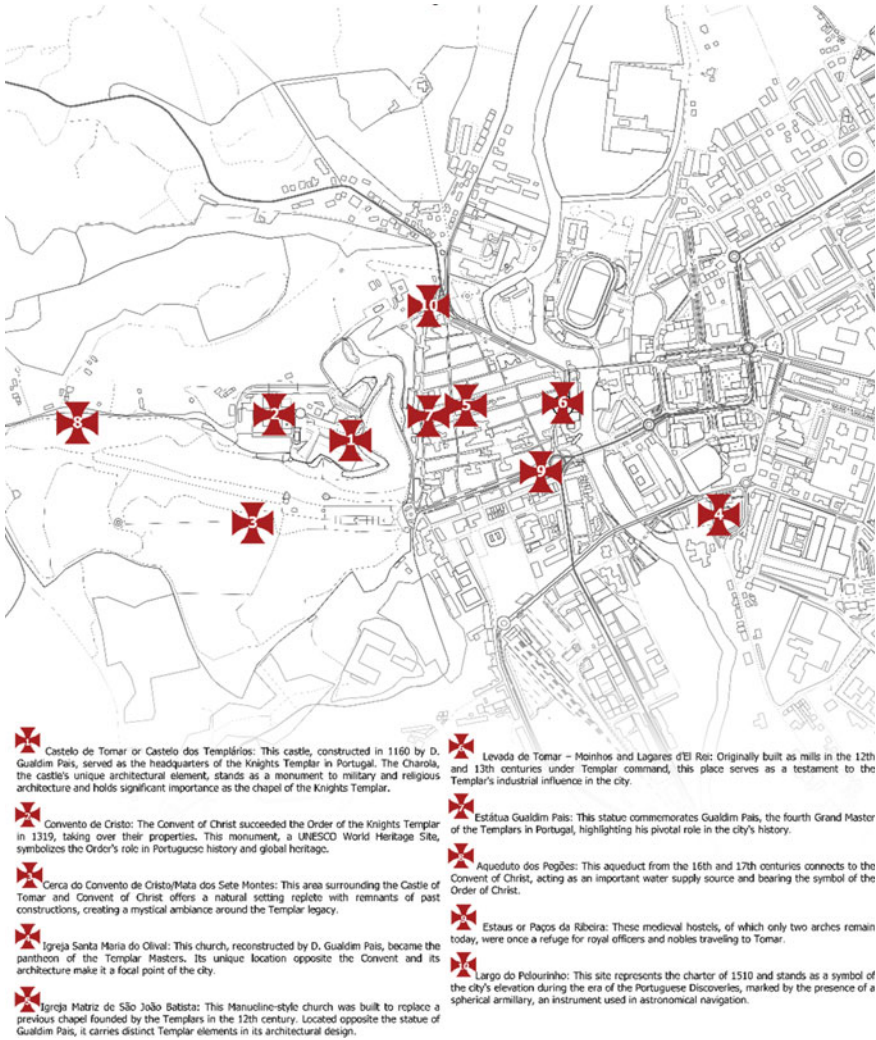


Fig. 19.1 Map with the identification and brief description of the key elements of Tomar's Templar heritage that can be integrated into an immersive gamified experience

19.5 Reviving the Templar Legacy: A Gamified Journey Through Tomar

Incorporating the central tenets of gamification, location affordances, and user engagement previously discussed, this proposal articulates an interdisciplinary framework aimed at enriching the touristic experience in Tomar. Based on the rich

narrative axis of the Templars, this innovative initiative aspires to offer both cultural and historical immersions in an entertaining and interactive way.

19.5.1 Methodology: Geocaching and Augmented Reality in Heritage Tourism

Background. Emerging from the principles of geocaching, a widely recognized recreational and educational activity [24], this endeavour seeks to modernize and expand upon the traditional format. Geocaching is based on the thrill of a treasure hunt but made more dynamic and information-rich through the use of GPS technology. By capitalizing on this concept, tourists are encouraged to engage directly with the rich cultural tapestry of Tomar.

Application to Tomar. The proposed system integrates these elements into a bespoke mobile application. Unlike standard geocaching, which is often disconnected from any overarching narrative or theme, the app aims to seamlessly integrate rich educational material about the Templars. This will be accomplished using augmented reality (AR) technology.

19.5.2 User Engagement and Dynamics

How It Works. After downloading the app and completing the registration process, users will find themselves on a digitized map of Tomar. Scattered throughout the map will be various “points of interest,” each linked to a cache containing either physical or virtual rewards, and challenges or questions that the user must answer to progress. They are provided with a “digital Templar Passport” to record their progress.

Rewards and Recognition. By completing challenges and successfully finding caches, users earn badges or points that can later be redeemed for physical rewards or certificates. A unique “Templar Honoris” membership certificate can be obtained from the Tourist Office upon completion of all challenges.

19.5.3 Illustrative Case Studies

Item 1: Templar Castle

Historical Background. Founded in the twelfth century under the stewardship of D. Gualdim Pais, the Templar Castle in Tomar stands as a testament to medieval military architecture [15]. The fortress not only protected the settlement but also served as a

base for the order's operations in the region. Pais, an expert in military fortifications, introduced revolutionary designs such as the *Alambor* and keep [15].

Gamified Experience. Through the app, participants can undertake quests that lead them through the castle grounds and the *Charola*, a unique circular chapel of significant religious and architectural importance [25]. AR can resurrect long-faded frescoes and architectural details, allowing users to see the castle and chapel as they would have appeared in their heyday.

Item 3: Mata dos Sete Montes

Overview. Nestled within the fortified boundaries of the Castle and the Convent of Christ, this forested area is steeped with mysticism [17]. This natural setting adds a layer of complexity and intrigue to the history of the Knights Templar.

Gamified Features. Challenges include solving riddles based on Templar history, or finding AR-enabled representations of Templar knights hidden in the scenery. A highlight would be the *Charolinha*, a small stone temple designed by João de Castilho, presented through AR as if he himself was there to guide you through its secrets.

Item 7: Praça da República and D. Gualdim Pais

The setting. Located in the heart of Tomar, this public square hosts a statue of D. Gualdim Pais, the 4th Grand Master of the Order of the Temple [26].

Gamified Elements. Users can interact with a holographic AI avatar of D. Gualdim Pais and listen to his first-hand account of the history of the Templars in Portugal and the city's formative years. Quests and challenges here could focus on the social contributions of the Templars, their religious ideologies, or their relations with other Portuguese and European entities.

Concluding Remarks. By combining traditional methods of historical engagement with modern technological features, this proposal promises to take heritage tourism in Tomar to the next level. Much more than a sightseeing excursion, it offers a deeply immersive, interactive, and educational experience that grounds the narrative of Tomar in its rich Templar heritage.

19.6 Conclusion

The city of Tomar, with its incomparable Templar heritage, offers a unique opportunity for those interested in culture and history. With its vast architectural, natural, and immaterial resources, this awe-inspiring municipality serves as a living tapestry that embodies the formidable power and far-reaching influence of the Templars. As these seemingly disparate threads intertwine, they bring to life a complex narrative of Templar history, a story waiting to be unravelled and appreciated by the curious observer.

The Templar Experience proposed seeks to encapsulate the rich tableau of Templar history by drawing on numerous integral elements. These resources not only anchor the experience in the historical legacy of the Templars, but also extend to a wealth of complementary cultural and tourist assets, creating a holistic visitor experience of richness and depth.

The use of immersive experiences through gamification strategies allows us to create a different experience for the user. The competitive elements and the ability to earn achievements and rewards encourage the pursuit of knowledge and enhance the sense of community and collaboration [27]. Leaderboards or ranking systems can be used to create a competitive environment that encourages participants to improve their skills and knowledge. This can lead to higher level of active participation and effort among users, resulting in a better understanding of the history and culture of the site [23].

These heritage resources and the experience curated pave the way for a better understanding of deep imprint that the Templars have left on the historical and cultural fabric of Tomar. The experience acts as a tangible channel through which the past reaches the present, offering an enriching historical narrative that goes beyond mere aesthetic appreciation. This historical narrative of the Templar legacy is essential for a deeper understanding of the lasting influence and monumental contributions of the Order.

Tomar, with its deep-rooted Templar history and wealth cultural resources, is an irreplaceable historical beacon. The city is a testament to the enduring legacy of the Templars, whose powerful influence echoes through the centuries, transcending the boundaries of time and space. An immersive historical experience, Tomar, offers a rare opportunity to relive the grandeur of the Templar era, uncovering the layers of a past full of faith, power, strategy and architectural innovation. This inimitable blend of history, culture, and natural beauty makes Tomar an essential destination for anyone wishing to experience the mystical aura of the Templars. The creation of the Templar Experience is therefore an important step towards preserving, celebrating, and sharing the remarkable Templar heritage that has indelibly marked the city of Tomar.

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Chapter 20

Business Intelligence Tools to Improve Business Strategy



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and Maria José Angélico Gonçalves

Abstract In the past, decision-support systems were non-integrated systems in an organization and, therefore, had a weak relationship with other information systems. Today, business information systems are the foundation of an organization, and practitioners design and implement business intelligence tools integrated into existing information systems, creating a comprehensive decision-support environment for management. Thus, innovating, increasing efficiency, and maintaining competitiveness for businesses are essential. Several business intelligence tools are on the market, ranging from standard MS Excel spreadsheets to OLAP tools and data mining software. With the advent of big data and the fact that data seamlessly gain dimension, a specialized approach to big data analytics has emerged, which is more data-driven and deals with large volumes, a variety of feeds and a higher rate of data feed. This article presents the leading business intelligence tools that combine operational data with analytical tools to extract and present complex, competitive, and valuable information for decision-making. The methodology used to achieve this objective was a critical review of the available tools and technologies: a literature review and content analysis of websites. As a result, the most prominent BI tools and their main functionalities were identified and posted in a summary table, and some conclusions were pointed out.

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20.1 Introduction

Nowadays, organizations are constantly pursuing the need to predict their future to make data-driven decisions with a high degree of complexity in an agile and expeditious manner based on the information they generate and provide.

The development of systems that enable analysis for decision-making in organizations has increasingly been identified as essential for improving the quantity and quality of information available for strategic decision-making in organizations [1–3].

In this context, decision-support systems (DSSs) are vital in the organizational environment since they automate daily activities to support strategic decision-making. These systems emerge to respond to the needs of managers at strategic, tactical, and operational levels.

At the strategic level, through Business Intelligence Systems, it is possible to define the main goals (the organization's strategic Key Performance Indicators) and objectives and to monitor them [4].

Implementing and using BI tools are essential for making better decisions and enhancing the organization's performance. Implementing BI tools is complicated, and many factors contribute to the successful implementation and use of BI tools. However, there are no commonly agreed success measures for implementing BI.

This paper presents the leading business intelligence tools that combine operational data with analytical tools to extract and present complex, competitive, and valuable information for decision-making.

After this introduction, Sect. 20.2 presents the main topics in the study area. Section 20.3 describes the methodologic approach, the procedures for data collection, and data analyses. Section 20.4 offers and discusses the results of the study. Finally, the main conclusion and the limitations of this study are described in the final section, in addition to future research opportunities on the topic.

20.2 Theoretical Background

20.2.1 *DSS to Enable Decision-Making*

Since the 1970s, researchers have focused on developing computer-based technology solutions that can be used to support complex decision-making and problem-solving [5].

A DSS is an information system that analyzes massive datasets effectively to aid business decision-making. DDS aims to develop and deploy information technology-based systems to support the decision-making processes [1, 6, 7]. According to [8], the DSS aim is to help decision-makers.

The large volume of data, the large number of options to consider, the need for analysis based on sophisticated mathematical models due to the uncertainty of the decisions, the large number of possible alternative solutions, and the achievement of

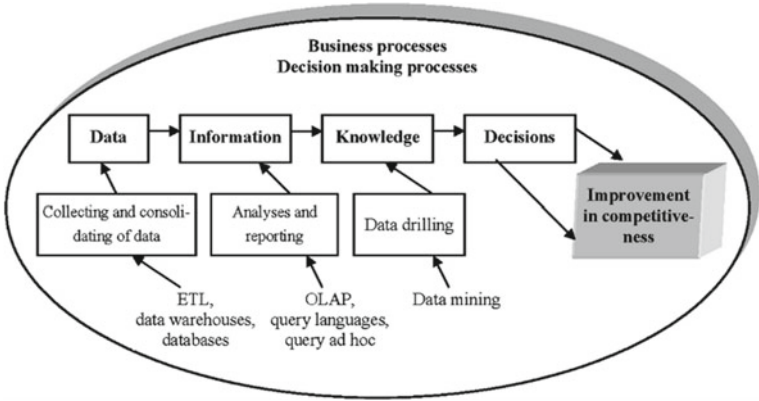


Fig. 20.1 Business processes decision-making

competitive and efficient advantages for organizations make DSS of great relevance for organizations.

Figure 20.1 shows the roadmap to enable the decision-making process [9], where we can see that raw data are transformed into information and knowledge and by which an environment is created to adopt effective strategic decision-making.

Business intelligence and decision-support systems are nowadays recognized as critical enterprise infrastructure. Upper and middle managements commonly use decision-support systems (DSSs) to develop alternative outcomes based on pre-existing and historical business data [10].

20.2.2 Business Intelligence

The evolution of contemporary society has been a determining factor in creating new mechanisms and systems to assist organizations in decision-making to become more competitive, have a greater organizational capacity, and obtain positive results at a global level.

The Business Intelligence System was developed around 1990 by the researcher Howner Dresner, who belonged to the Gartner Group and who stated that BI is a term used in business management that serves to describe the different applications and technologies that are used to collect, provide, and analyze data and information that constitute an organization, to be used to assist in making important decisions based on organized and analyzed data [11].

According to [12], the use of Business Intelligence in organizations is essential and beneficial because it helps to process data quickly and obtain deeper detail about the work that is done through financial analysis, marketing communication planning and the management of different departments, which provide information

about suppliers and customers, which help to structure which are the best strategies to adopt to receive positive results and thus overcome the competition [12].

It should be stated that the Business Intelligence concept is understood as a digital tool that has mechanisms that help the user to collect, process, store, and organize a large amount of data to assist in decision-making processes and the interpretation of relevant information [13].

According to [3], the use of BI tools brings changes at various levels, namely in the organizational context, not only in decision-making but also in the quality of data, human resources, and the time to perform certain practices. Regarding the repercussions on decision-making, the BI tools impact three levels: data quality, data analysis, and even the human factor [3, 14]. Regarding the first factor, the authors state that it is characterized by being essential in creating value from existing processes. Concerning data analysis, they show that decision-making must consider data analysis and control to manage the business promptly. Finally, human factors' impact on managers' decisions depends on the nature of the problems raised.

The limitations of implementing the BI can be summarized in internal, external, and technical factors. Berhane et al. [14] identified internal factors and [15] state that there may be limitations in the knowledge of their employees in the use of BI tools without adequate training for them. There is also a tendency for the organization's employees to use existing tools and processes instead of this kind of information systems, even if this takes longer to run. Regarding external factors, the same authors emphasize that when external IT consultants exist, difficulties may arise in obtaining the necessary support in using BI concerning organizational processes. In addition, regarding technical factors, the same authors state that problems may occur in the quality of the information in this new tool. Difficulties may also arise that cause the information to be manually entered into the system, which will also be a problem considering that there is a possibility that this manual process has errors or failures. Information privacy can be a technical challenge for organizations, as it can cause problems when data are loaded into the BI system [16]. It is, however, necessary that to maximize their performance, they outline strategies and plans so that the Business Intelligence tools meet their needs, constantly considering all the challenges and limitations described here.

20.2.3 Business Intelligence Systems' Components

Business Intelligence Systems offer data integration and analytical capabilities that provide valuable decision-making [1].

According to Wixom and Watson [17], BI is a process that includes two primary activities: getting data in and getting data out. Getting data in, traditionally called data warehousing, involves moving data from a set of source systems into an integrated data warehouse. The second activity, commonly referred to as BI, consists of business users and applications accessing data analytics. Figure 20.2 presents the BI framework.

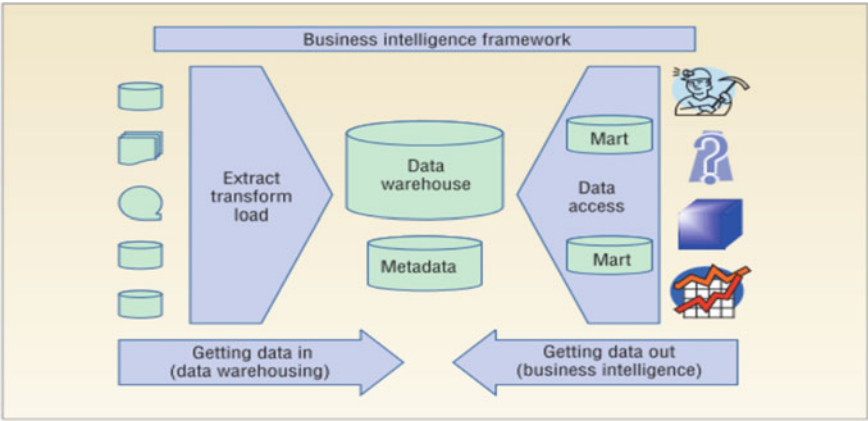


Fig. 20.2 BI framework

The information comes from different sources, such as other information systems such as Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Supply Chain Management (SCM) tools, among others [18]. However, through the extract, transform, and load (ETL) process, only essential information will be considered in the needs of each department so that there is no excess of information, thus concentrating the data from the different sources of the organization in a more agile way in the elaboration of reports in the Business Intelligence tool used.

The data warehouse, which holds all relevant internal and external data, is often considered the core of BI. The quality and format of data sources vary, as does their meaning, depending on their origin. Today, data are more granular and produced in much larger volumes than ever. Extract, transform, and load are standard methods to integrate this data and ensure its validity and usefulness to an organization. In addition, the tool cleanses the data before storing it in the data warehouse and preparing it for BI tasks. These are the back-end processes of a traditional BI system. When data are available in a central data warehouse, different levels of media servers are used for data analysis, which serves as the basis for decision reports used by decision-makers [19].

20.3 Materials and Methods

The present study aims to identify the primary business intelligence tools that combine operational data with analytical tools to extract and present complex, competitive, and valuable information for decision-making. In order to realize the proposed objective, an exploratory study with a qualitative approach was carried out. The technique used to collect empirical data was content analysis of the available

information contained in the tools websites, manuals, and documents of the tools. Some tools were also installed and explored.

20.3.1 Tools’ Selection

Implementing and using BI tools are essential to make better decisions and improve the organization’s performance. In 2018, [2] developed a study where he presented a research conceptual framework to identify critical factors in BI tools. The framework defined the essential success factors and divided them into Organization, Technology, Environment, and Process categories. Moreover, [20] defined the fundamental characteristics of BI tools.

In addition [21], by applying a graphical treatment and a uniform set of evaluation criteria, a Magic Quadrant helps you quickly ascertain how well technology providers are executing their stated visions and how well they are performing against Gartner’s market view (see Fig. 20.3).

The BI tools are used in the business context. Gartner’s Magic Quadrants provides graphical comparative current market trends through a two-dimensional matrix that assesses a vision study and execution capacity.

Also according to [21], the Leaders indicate the software which matches their vision of the software and has a solid foundation for implementing new functionalities that will be needed in the future. The visionaries have a good understanding of the market and ideas about changing the market rules but still need to execute better. The Niche players match a specific task but need help competing on other fronts, which

Fig. 20.3 Magic quadrant for business intelligence



can be related to a need for more innovation or performance. The challengers have solid software that executes well but needs to understand the market's direction.

Given the above, the tools selected were Microsoft Power BI, Tableau, Qlik, MicroStrategy, IBM Cognos Analytics, Oracle Analytics, and Looker (Google Cloud Platform, since 2019). We analyzed all the tools of the quadrant Leaders quadrant and some of the best-placed tools in the Visionaries and Niche Players quadrants.

20.3.2 Data Collection

An analysis matrix was developed to record the functionalities/features of the BI tools. For each of the tools analyzed, the following items:

- Supported Operating Systems.
- Functionalities.
- Advantages.
- Disadvantages.

Data were collected during the period March 2023–July 2023.

The following section presents the results.

20.4 Results Presentation

The present study briefly presents, analyzes, and compares the Business Intelligence tools selected. At the end of this section, a summary table is given with the main features addressed in the study.

20.4.1 Power BI

Microsoft has developed Power BI in 2015. It is a cloud-based business analytical and visualizing tool for business decision-makers to monitor business performance and interact with data to obtain more or less detailed business insights.

Power BI is a software consisting of several tools that allow data analysis, linking data from different sources, as well as creating reports, graphs, visualizations, and dashboards, which allow analyzing the performance indicators and metrics that are most relevant to the growth of the organization and support the decision-making process [22, 23]. Power BI has two paid options: Power BI Pro, which allows publications on the Web, and Mobile and Power BI Premium, which has advanced features in Azure [22].

The main advantages are that the tool is low-cost and easy to handle [24], updates are frequent and present pre-defined graphics that help inexperienced users [25], and

it also contains a considerable diversity of graphics/visualizations with appealing design, allows integration with several data sources and the extraction and transformation of data in a simple way, and also allows integration in the cloud and the use of formulas and DAX expressions (Data Analysis Expressions). Power BI has sophisticated data visualization features and an intuitive design and integrates excellently with the rest of the Microsoft Office [26]. However, it also has the disadvantage that it only exists for the Windows operating system [27].

Microsoft Power BI has been recognized as the first Leader in the Analytics and Business Intelligence Platform in the Gartner Magic Quadrant [21].

20.4.2 Tableau

Tableau was founded in 2003 as a result of a computer science project at Stanford that aimed to improve the flow of analysis and make data more accessible to people through visualization [28].

Tableau is one of the leading solutions for business intelligence and is available on premise and on a public cloud basis. It is a data visualization tool that allows the creation of interactive visualizations from a set of data from various databases, such as Excel, PDF, and Text File, and various servers, such as MySQL and OneDrive [29]. It is a tool that has adopted the self-service BI model [30] as it offers an analytical component so that users can present, analyze, and prepare data, identify patterns, and obtain results more quickly [25]. Analyses can be presented through dashboards, online visualizations, scatter plots, and analytical panels [24], providing live visual analysis and interactive dashboards. Tableau is available for Microsoft Windows, Android, and iOS [30].

One of Tableau's special features is the inclusion of Natural Language Processing (NLP), allowing users to quickly describe what they are looking for using their own words. Another advantage is integrating with Google Analytics [30]; a large community of users uses it, and it is user-friendly. A disadvantage is that it is a costly tool [25].

However, Tableau provides basic preprocessing; thus, cleaning data must be recurring to other tools. Visualizations provided are also limited when compared with other tools, have few hardware requirements, and require advanced programming knowledge, with drag-and-drop techniques to allow the integration of data and the creation of visual graphs.

20.4.3 QlikView

QlikView is a data visualization and business intelligence software created by the Qlik company, which was founded in 1993 by three Swedish [31].

QlikView is a business intelligence and analytics software with which users can quickly and efficiently create data visualizations, reports, and dashboards and interact and collaborate with real-time data analysis. QlikView enables users to assemble data from multiple sources (such as Excel and SQL databases), explore data, discover insights, solve business problems, and make informed business decisions. QlikView is available only in the desktop version [32]. QlikView provides the means for the complete development of a BI tool, from extracting, transforming, and loading (ETL) data to developing and designing a Dashboard. QlikSense is [25] a self-service BI tool more focused on business users. Both share the same engine running the data and rely on a script for data modeling.

The advantages of the Qlik tool are continuous updating of data preparation and analytical capabilities [25] and functionalities to perform complex calculations and modeling that come from a large amount of data. Regarding the disadvantages, it is a complex tool compared to Power BI and Tableau tools. It is necessary to obtain scientific knowledge, and it does not present quality in the visualizations [25], in addition to its high cost [24].

20.4.4 *MicroStrategy*

MicroStrategy was founded in 1989 by Michael J. Saylor and Sanju Bansal [33]. The tool has software that helps companies in data processing with the ability to make reports accurately and efficiently, thus allowing the introduction of Business Intelligence in organizations. Over the years, it has grown and is now one of the largest companies with as many customers: small, medium, and large. MicroStrategy offers a clear and easy-to-use interface that allows you to work more effectively and utilize all the tool's features. All tasks are performed through the Web or Desktop interface. It has the competence to create reports with a great capacity for analysis [30]. The tool only works on operating systems of Microsoft Windows [33], UNIX, and Linux [34].

There are advantages associated with the MicroStrategy tool, such as developing BI software applications according to business data, having the possibility to analyze a large amount of data, the layout of the tool being dynamic for visualizations and creating statistical-based reports. On the other hand, it has disadvantages because it is a rather complex tool; sometimes, there are development problems, and the user must have deep knowledge about the platform to elaborate their analyses [33].

20.4.5 *IBM Cognos Analytics*

IBM Cognos Analytics, formerly known as IBM Cognos Business Intelligence, is a web-based business intelligence platform that enables data analysis, reporting, scorecarding (a tool for managing the performance of applied strategies), and metrics

monitoring [35]. It allows data import from different cloud sources and databases such as SQL, Google BigQuery, and Amazon. Due to the use of artificial intelligence, Cognos Analytics allows an automatic preparation and connection of the imported data into the tool. It contains different functionalities, such as creating dynamic dashboards, discovering unknown patterns, and customized reports [36]. IBM Cognos Analytics presents three paid versions: Standard, Plus, and Premium [36], and a free 30-day trial version, Cognos Analytics with Watson [37]. The tool can be used on the following operating systems: AIX, Linux, Mobile OS, and Microsoft Windows [36, 38].

The IBM Cognos Analytics tool has advantages; for example, it is a self-service BI tool, which means that it is easy to understand and use, prepares data based on artificial intelligence, and allows different deployment options: on the device itself, in the cloud or through platforms such as Microsoft Azure, Google, AWS. The disadvantage of this tool is that the cost to acquire it is high, and it needs to present innovation in its functionalities [39]. Its latest version includes an artificial intelligence (AI) assistant interface and native natural language generation (NLG).

20.4.6 Oracle

Oracle Corporation was founded in 1977 by Larry Ellison, Bob Miner, and Ed Oates. It is a US-based company that develops and markets hardware systems and enterprise software products [40]. Oracle Analytics is a platform that provides different services related to the processing and evaluation of data (which can be stored in the cloud or on the desktop) that result in valuable information that will be used in the organizations' decision-making. Oracle Analytics employs artificial intelligence and machine learning to make its structure more innovative and provide a connection, preparation, modeling, exploration, and sharing of information obtained through data processing [41]. The functionalities of this tool are: explore and search for visual or verbal information. It allows for a "search-like experience", a spoken narration of the results of analyses, instead of the display of traditional dashboards. Presentations related information through graphs and customized maps according to the studies performed. There is the possibility to interconnect data sources that belong to Oracle with those that do not, and finally, it offers analytical solutions already realized [41].

The advantages of this tool are that it has the functionality to create deeper analyses, the program is available in 28 languages, and the user can store the data through the cloud. As for the disadvantages, it presents competitive products, but the public does not know them, and only Oracle Cloud can access any data source and business analytics applications [39].

20.4.7 *Pyramid Analytics*

Pyramid Analytics was developed by Omri Kohl, Avi Perez, and Herbert Ochtman. It is a platform that provides analytical functionality and data visualization without needing in-depth knowledge of the subject, as it is a self-service BI tool. Due to the ease of use, users can perform business analyses and dashboards and make decisions faster in just one platform. The platform's functionalities are easier because of artificial intelligence. Pyramid Analytics provides a query engine, PYRANA, which is an engine that helps in building and performing calculations associated with numeric databases [42, 43]. The tool is exclusive to the Microsoft Windows and Linux operating systems [43].

According to [42], there is only one component associated with the tool, which is Pyramid's Tabulate app—a virtual spreadsheet that is designated for business modeling and provides real-time business data through queries, visualizations, and flexible formatting; all the information that is pulled out can be presented or shared through interactive dashboards, visualizations, and reports.

Pyramid Analytics has advantages such as sharing information across multiple datasets and metadata, easy use, and installation of the platform. It provides automatic and dynamic visualizations, but it also has disadvantages as it needs more innovation and vision about the tool, no product quality, and low market visibility [39].

20.4.8 *Looker*

Looker is a company based in Santa Cruz, California, in the USA, and was founded in 2011 [44]. It is a Business Intelligence and Big Data Analytics software that provides help with exploring, analyzing, and sharing information in real-time through dashboards and visualizations. It is possible to work with different databases such as BigQuery, Redshift, and Snowflake and also with different cloud platforms such as Google Cloud Platform or AWS [45].

Looker is built on a web architecture hosted in the cloud, and it runs entirely in the browser; hence, unlike Power BI, Tableau, and Qlik, there is no need to install a desktop version.

The Looker tool has advantages such as the user experience, the tool is of good quality, and it can model the data and reuse data and calculations in other applications. Regarding the disadvantages, the tool can only be used in the USA, Great Britain, Ireland, and Japan; it lacks data preparation and visualization capabilities and requires knowledge of computer programming [39].

Comparing Business Intelligence Tools.

Table 20.1 summarizes the BI tools, highlighting the most important features that discriminate each tool.

Table 20.1 Business intelligence systems

BI tools		Visualizations	Operating systems	Functionalities	Advantages	Disadvantages
Microsoft Power BI		• Reporting • Graphical visualizations • Dashboards	• Microsoft Windows • Android • iOS	• Data lake • Extract–transform–load data • OLAP multidimensional analysis. Data processing • Security access levels • Data modeling	• Low cost • Easy to use • Drag and drop interface • Frequent upgrades • Supports almost all types of sources • Large variety of reports/visualizations • Cloud-based version • Deep learning algorithms • Real-time data analysis • Integration with MS products • Interactive visualizations	• Only available for the Windows platform • Limited data storage of 1GB for power BI desktop free version
	Tableau	• Dashboards • Graphical visualizations • Microsoft Windows	• Microsoft Windows • Android • iOS	• Extract-transform-Load data • OLAP multidimensional analysis • Basic data manipulation functions • Security access levels	• Self-service BI • There is no limitation on the data analyzed • Supports almost all types of sources • No limited storage • Loud-based version • Integration with R and Google analytics	• Highly cost • Needs skilled users

(continued)

Table 20.1 (continued)

BI tools	Visualizations	Operating systems	Functionalities	Advantages	Disadvantages
Qlik	• Dashboards • Graphical visualizations	• Microsoft Windows • Android • iOS	Extract–transform–load data • OLAP multidimensional analysis • Data modeling	• Supports almost all types of sources • Ability to perform complex calculations and modeling	• Needs skilled users
MicroStrategy	Reporting • Graphical visualizations • Dashboards	• Microsoft Windows • UNIX • Linux	• OLAP multidimensional analysis Predictive analysis and alerts • High-security access levels	• Analysis of a large amount of data • Dynamic layout in visualizations • Supports almost all types of sources • Integration with MS office suite	• Not easy to use
IBM Cognos analytics	• Reporting • Data analysis	• AIX; • Linux • Mobile OS • Microsoft Windows	• Data lake • Data processing tools • Data modeling	• Self-service BI • Easy to understand and use tool • advanced ML algorithms	• Highly costly

(continued)

Table 20.1 (continued)

BI tools	Visualizations	Operating systems	Functionalities	Advantages	Disadvantages
Oracle analytics	• Reporting • Graphical visualizations • Dashboards	• Microsoft Windows • MacOS • Android • iOS	• Data processing tools	• Reporting • Self-service BI • Easy to use • Advanced ML algorithms • Cloud data storage • Interactive visualizations	• Only the Oracle cloud component can access any data source
Looker Google cloud platform, since 2019	• Reporting • Dashboards	• It works on a cloud	• Explore, analyze, and share information in real-time	• Possibility to model and reuse data • Complex aggregation and calculations almost in real-time • Cloud-based version • Multi-cloud integration • Advanced ML algorithms	• Lack of data preparation tools and lack of visualization capacity

20.5 Comparing Business Intelligence Tools

Table 20.1 summarizes the BI tools, highlighting the most important features that discriminate each tool.

Regarding the visualizations provided, all tools allow for reporting and data analysis. Some tools enable the development of dashboards and graphical reports.

Of the tools presented, almost all systems allow the use of Windows OS, MacOS, and mobile technology operating systems (IOS and Android). The MicroStrategy and IBM Cognos Analytics tools will enable the use of Windows and Linux.

Regarding the functionalities, some tools allow the creation of Data Lakes; all allow analysis using OLAP tools and data sharing. IBM Cognos Analytics provides metadata management. Some will enable the definition of security levels.

As for the advantages/disadvantages, we can highlight the tool's usability, the cost, the functionalities provided, the maintenance of the tools, and the storage capacity (free versions).

20.6 Conclusions

The literature review, as well as the content analysis, showed that BI is an emerging technology that, over time, has become indispensable for organizations. It enables effective decision-making, improves business processes, increases business performance, and enables making new deals [1–3].

The objective of this work was to identify the main tools available, as well as their characteristics. So, there are several tools which can be implemented in organizations. According to Gartner 2002 [21], by applying a graphical treatment and a uniform set of evaluation criteria, a Magic Quadrant helps you quickly ascertain how well technology providers are executing their stated visions and how well they are performing against Gartner's market view.

Regarding the analysis of the tools, we note that significant software development companies (Microsoft, IBM, Google, Oracle) have BI and analytics tools available; most of the tools are available on Windows, iOS, and Android operating systems. Although some tools are also available on Linux, some tools allow the creation of Data Lakes; all allow analysis using OLAP tools and data sharing. IBM Cognos Analytics provides metadata management. Some will enable the definition of security levels. In line with market research, the Microsoft tool has the highest use trend. Some companies are migrating to the Microsoft tool after having used others (Pedro article). As for the advantages/disadvantages, we can highlight the tool's usability, the cost, the functionalities provided, the maintenance of the tools, and the storage capacity (free versions).

A limitation of this study is related to the methodology used. To achieve the objective of the work, other methodology could be used, namely a questionnaire survey (interviewing decision-makers and launching questionnaires to measure the perception of users and developers of the tools).

As future suggestions for future research, it is proposed to measure the financial impact of emerging technologies on the accounting sector and to identify how universities are considering changing their accounting course curricula to adapt to emerging technologies and digital transformation in the sector.

As suggestions for future research, applying the methodology mentioned in the limitations is proposed, using a case in a real context.

This study is intended to support decision-makers when they have to select the tool to implement.

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Chapter 21

Technology Towards Luxury Brands: Preliminary Insights on Fashion Tourism, Metaverse and Non-fungible Token (NFT)



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Abstract The luxury fashion industry is undergoing a profound transformation due to the uncertainty experienced recently because of constant change, increasingly competitive markets and increased competition. Fashion tourism can be defined as the interaction between Destination Marketing Organizations (DMOs), trade associations, tourism suppliers and host communities, with people travelling to and visiting a particular place for business or leisure to enjoy, experiment, discover, study, trade, communicate about and consume fashion. Luxury brands, characterized by their traditional and conservative approach, have been pressured to make strategic decisions towards the digital and technological world, thanks to the covid-19 pandemic. As luxury represents something much more emotional, contrary to what might be thought by often associating luxury with material goods, luxury brands are entering the virtual world precisely to provide unique shopping and entertainment experiences, just as consumers crave. Methodologically, this is a qualitative exploratory study using netnography. In terms of results and conclusions, the relevance of studying how luxury brands can use technology to their advantage, particularly, regarding the Metaverse and Non-fungible Tokens, is thus justified. Several luxury brands have all benefited greatly from their digital journeys. In conclusion, in the virtual world, luxury has the same aspirational relevance that it has in life. With an interdisciplinary approach, the chapter presents preliminary insights for fashion tourism and digital knowledge management.

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21.1 Introduction

Currently, with increasing globalization, increased competition and the evolution of market competitiveness, times of uncertainty and constant change are being experienced. The world of luxury fashion is no exception and is also undergoing profound transformation. Luxury brands generally have a very traditional and conservative approach; however, with the covid-19 pandemic [1], these companies found themselves pressured to make strategic decisions towards the digital and technological world [2].

For this reason, more and more companies in the luxury market are changing their approach and mentality, incorporating the virtual world into their long-term strategies, trying at the same time to reach new consumers who, if they followed the traditional way [3], would not be able to call their attention, such as generation Z. By accelerating the adoption of strategies that include the digital world, providing luxury shopping experiences using technology, this new target audience can be captivated and respond positively to the onslaughts of luxury brands. The starting point of this preliminary chapter is: how are luxury brands strategically using the Metaverse and NFT? Virtual, and, in particular, with regard to the NFT market and Metaverse platforms. Thus, the two main objectives of this study were defined, such as: (1) understanding how the Metaverse can contribute to the expansion of the luxury fashion industry and (2) identifying the advantages of creating and marketing NFT by fashion luxury brands.

21.2 Theoretical Background

Lazzeretti, Capone and Casadei [4] argue that fashion tourism is a niche market segment evolved out of three major sectors: Creative Tourism, Cultural Tourism and Shopping Tourism. Fashion tourism can be defined as the interaction between Destination Marketing Organizations (DMOs), trade associations, tourism suppliers and host communities, with people travelling to and visiting a particular place for business or leisure to enjoy, experiment, discover, study, trade, communicate about and consume fashion [5]. International cities are increasingly using the cultural industries for the development of tourism and other industries to boost their economic fortune and to position themselves in the global market [6].

Luxury fashion brands have entered the tech world in a variety of ways, with the aim of using the digital world to their advantage, particularly the Metaverse and NFT. According to [7], the benefits that a luxury brand in the Metaverse and/or through the NFT can achieve are the following: (1) consumers of luxury goods in the Metaverse can become new customers of traditional physical goods in the future; (2) conquest of a new generation of customers, younger ones and who are not the usual buyers of traditional physical luxury items; (3) capacity to use Metaverse as a platform for testing projects before putting them into physical production; (4) sustainable

character of luxury allied to technology in its production and distribution; (5) creating new revenue streams; (6) use of designs from past collections to be converted into new NFT virtual assets, while promoting the brand's heritage; (7) high profit margins coming from the creation of NFT digital items that can be infinitely replicated for free and distributed for a significantly lower amount than their physical equivalents; and (8) ongoing royalty fees due to future transactions of NFT Virtual Goods as the Goods change hands;

The technological world is constantly changing, and for many, the Metaverse represents the next step in the evolution of how people interact, work and play online. The Metaverse concept has been circulating in video game markets, as more and more platforms adopt virtual reality environments that allow multiple users to participate simultaneously [8]. According to [9], the Metaverse is a post-reality universe, a perpetual and persistent multi-user environment that fuses physical reality with digital virtuality. It is an interconnected web of social, immersive environments networked on multi-user platforms persistent.

It was the science fiction author Neal Stephenson who, in 1992, in his novel "Snow Crash", first mentions the word "Metaverse". At that time, the concept was used to describe three-dimensional virtual worlds in which there was no physical limitation on the interaction between individuals. The author introduced the idea of Metaverse, being a web of virtual reality where people from all over the world can access, connecting through glasses and headphones, starting to materialize in Metaverse in the form of configurable digital bodies called avatars [10].

According to [11], the Metaverse represents the world of extended reality (ER) that encompasses all the different forms of computer reality that are produced by it. RE therefore includes all aspects of the following three realities: (1) Augmented Reality (AR)—superimposes digital information on real-world scenarios. AR applies when using a mobile phone camera to translate signs and menus in real time from one language to another [12]. The game "Pokémon Go" is an example of the use of AR [13]. Hundreds of AR applications are now available for use on smartphones. (2) Virtual reality (VR)—people are completely immersed in a digital environment. Virtual reality scenarios can be created as fully synthetic computer-generated content, they can be made up of real-world content (defined in real 360° video), or it can be a hybrid, being a combination of both; and (3) mixed reality (MR)—experiences [14–16] that allow people to interact and manipulate computer-generated images in the real world, in real time. You use a headset, but you see and remain immersed in the real world, you see and interact with images using your hands [17]—for example, a three-dimensional (3D) architectural floor plan for a new school or a 3D schematic for an electric vehicle.

Although augmented reality games and social spaces have been around for several decades, the development of the Metaverse experienced a sharp acceleration in early 2020 (i.e. covid-19 pandemic). When it was brought to the forefront, new investments of exorbitant amounts emerged, since the belief was that the Metaverse would be the future of the internet [18]. In addition to the technologies that were already in use for some time, digital avatars or online games with multiple players, the latest technological advances allow the purchase of various non-fungible token-based

digital products, the NFT [19], thus opening the door to a new form of trade. Currently, users can meet, interact and socialize with each other by taking the form of avatars or 3D holograms that are in physical or virtual spaces [20].

The luxury fashion industry will continue to be driven by the Metaverse towards what is known as “the experience economy”, where the main value proposition is to provide consumers with experiences rather than physical goods. Luxury brands can sell their items more economically and creatively through NFT and Web 3.0 Metaverse platforms. An advantage of this process is that brands do not have to worry about delivering inventory or opening physical stores, and customers can enjoy unique shopping experiences and new forms of entertainment [21–23].

Between 24 and 27 March 2022, a remarkable event in the history of fashion took place in the virtual world with the first edition of Metaverse Fashion Week (MFW) [24]. Thus, with a simple click, in the comfort of their homes, users could access virtual stores, fashion shows, after parties and conferences organized by various brands.

Brands were able to present their models on the catwalk, showing their creations to visitors, who, free of charge and without special invitation, had the opportunity to obtain different sensory and interactive experiences, participate in events and lectures and even buy clothing and accessories. digital [25–27].

MFW allowed brands to confirm that they would have potential customers in Metaverse. This store allowed users to buy the brand's clothes and accessories to customize their avatars with items from the Etro collection [28]. Therefore, and according to [29], fashion events have the particularity of adding recognition and value to host cities, which is reflected in a competitive advantage over competing destinations. However, the tourism of fashion events is not properly valued by the tourism industry, and therefore, this research aims to deepen scientific knowledge about this tourism segment [30].

21.3 Methodology and Preliminary Insights

A qualitative, exploratory methodology was adopted. Additionally, in the continuation of the methodology process, three case studies are presented. For this, the three luxury brands that already more and better use technological means such as Metaverse and NFT were chosen. The methodological approach chosen for this research was netnography. According to [31], netnography is a scientific methodology that is used to observe online communities regarding their influence on the lives of their members, in this case, who appear on the internet. The approach used is adapted to study blogs, newsgroups, forums, social networks, among others.

Netnography becomes progressively more important for the study of digital cultures. Netnography has been considered extremely useful in all academic fields, revealing rules, personal narratives and specific practices. Kozinets [32] establishes ten criteria in order to evaluate and inspire the quality of netnographic research.

The criteria are: coherence, rigour, knowledge, anchoring, innovation, resonance, verisimilitude, reflexivity, praxis and mixture.

With regard to methodological procedures for netnographic studies, [32] recommends the following steps—stressing that all steps must be in accordance with research ethics: (1) input: formulation of research questions and identification of the appropriate community to study; (2) data selection and collection: direct observation of communications/information found through the use of a computer and the internet and collection of relevant data; and (3) analysis and interpretation: classification and analysis of data followed by interpretation of results and articulation with theory.

According to [32], the process of transforming the products collected from participation and netnographic observation into a finished version of the research falls under data analysis. Throughout the stages of selection, collection and analysis of data, to carry out his research, the author uses various types of tools, namely, search engines such as Google that can result in text files, graphics, screenshots, transcripts from online interviews or reflective field notes.

With regard to the community under study in this investigation, which are luxury brands, the best three were selected, with the purpose of analyzing the particular case of each one, analyzing their remarkable journey in the virtual world. The chosen brands were Dolce & Gabbana, Balenciaga and Gucci. After a quick search, it was possible to verify that these three great luxury brands had expression in the Metaverse and in the launch of NFT, being pioneers to reach historical milestones, namely, in the launching of a luxury collection of NFT, in the appearance in the Metaverse, in partnership with video games, presence at MVFW, launch of the first luxury NFT or construction of its own digital world in Metaverse.

It was found, in the three case studies, that luxury brands took advantage of this, taking advantage, in this way, to create more captivating and immersive experiences for users. In the case of Dolce & Gabbana, both the pieces from its NFT Collection and the looks presented on the MVFW catwalk could and have been acquired by Metaverse users with the intention of equipping their avatars. In the case of Balenciaga, with the partnership with the video game Fortnite, in which the luxury brand went directly to the platform where potential customers of its virtual pieces could be found, which were bought by players and used by their avatars. In Gucci Vault Land when they bought virtual items from the brand that their avatars could use in The Sandbox spaces, such as with NFT SuperGucci or in the case of the game Gucci Town from the Italian brand where virtual clothing and accessories were made available for avatars in Metaverse.

Considering the first objective defined for this study—understanding how the Metaverse can contribute to the expansion of the luxury fashion industry—it is possible to state that the objective was fully achieved. Taking into account the second objective outlined for this work—identifying the advantages of creating and marketing NFT by luxury brands—it can be considered that it was also fully achieved.

Finally, answering the research question “How are luxury brands using the Metaverse and the NFT in their favor?”, it can be said that throughout this investigation, different options have emerged and as seen in the cases of study, the three brands

opted for different paths, from partnerships with video games, launching NFT collections with the purpose of equipping avatars, presentations on the MVFW catwalk; launch of NFT with collectors of rare digital items and fans of the brands as a target audience, experiences in the Metaverse with the sale of digital skins and even the creation of its own game in Metaverse with the sale of the brand's digital items.

21.4 Results

With the theoretical foundation related to the service of technology by luxury brands, it was possible to understand that the Metaverse is generally constituted by RE spaces, where interactions between human beings and automated entities take place through AR applications, which sometimes occur in more remote places. It was noticed the numerous advantageous opportunities that luxury brands could have due to the use of Metaverse platforms and NFT trading markets. The results from this confrontation between the theoretical foundation and the practical cases revealed, quite clearly, that the use of Metaverse technology and the creation of NFT for commercialization are really beneficial for luxury brands.

The advantages pointed out included the creation of new revenue streams, the sustainable nature of digital luxury items, the ability to use Metaverse as platforms for testing projects before moving to physical production, the possibility of using designs from past collections transforming them new NFTs, high profit margins from creating NFTs that can be produced and distributed at a much lower cost than physical ones, receiving royalties as NFTs change hands and gaining a new generation of customers who will be future customers of the brands' physical products.

21.5 Conclusions

In conclusion, Metaverse and NFT have the ability to benefit traditional luxury companies and can even improve engagement with their customers. With the analysis of the brands' cases, it was understood that the NFT must be combined with physical products or with experiences, so that they become more desirable in the eyes of the modern consumer of luxury fashion. Case studies from Dolce & Gabbana, Balenciaga and Gucci corroborate these conclusions, showing that luxury brands can benefit from including Metaverse and NFT in their digital branding and marketing strategies. Thus, this research made it possible to verify that, in the digital world, luxury has the same aspirational relevance as it does in real life: it is a differentiating asset and serves to express the way of being and the values of its possessor. Regarding the limitations of the study, it should be noted that, as this topic is so recent, the number of studies already carried out on the subject is still small. For future studies, it is suggested to analyze the performance and measurability of the chatbot, often used in customer service, applied in Metaverse. Future studies can

explore more deeply the understanding of the complex process of decision-making for couples travel, in a post-pandemic scenario (i.e. covid-19), such as destination choice and risk assessment. Tourism has undergone many changes in terms of habits and trends. Fashion tourism is a notorious example of being affected by the pandemic and the acceleration of technology. Several changes have appeared in the consumption of this type of tourism (e.g. video mapping, online visits, digital access). As such, the present study aims to understand how relational marketing an important competitive factor for tourist destinations and tourist fashion events can be. In the future studies, it will be essential to carry out in-depth interviews with specialists of the phenomenon studied and to develop an empirical (quantitative) study through questionnaires to tourist consumers (from the “fashion tourism” market niche).

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Chapter 22

Applying the Importance–Performance Matrix to the Podence Carnival Festival



Fernanda A. Ferreira , Cláudia S. Martins, and Paula O. Fernandes 

Abstract Tourism has been playing an important role in the world and it has been one of the economic activities that has contributed the most to the growth and development of regions, especially local communities, as it is the case of Podence, a village located in the Northeast of Portugal. Podence has as its main activity which induces tourism a characteristic carnival, entitled Carnival of Podence or *Festa dos Rapazes*. In this context, the main objective of this research is based on analyzing the importance and satisfaction expressed by visitors to the festival with regard to attributes that allow evaluating the festivity. Having this objective, the added value of this research is the real contribution that it gives to the organization's success of the Carnival of Podence festival. For this, a quantitative methodology was used, and data collection was done through a hand-by-hand administered questionnaire survey on the two days of the festivity that occurred in February 2022. For the purpose of the study, a final sample of 200 valid questionnaires was worked with. The Importance–Satisfaction Analysis is revised from the Importance–Performance Analysis which was used to answer the objective of the study. The results showed that the attributes with the greatest importance and that generated the highest visitor satisfaction were “reception/hospitality”, “local gastronomy” and “surrounding/social environment”. The attributes *festivity-related leisure activities*, *enclosure*, and *promotion of the festivity through souvenirs* seem not to be of great importance nor did they generate high satisfaction for visitors. On the other hand, through the tool used, it was possible to verify that the *dissemination of the festivity* attribute should deserve more attention and care from the organization of this festivity since the visitors attributed high importance and low satisfaction to it.

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22.1 Introduction

The ancient Carnival held in the village of Podence is one of the most important traditional events of northern Portugal and attracts thousands of visitors every year. One of the most remarkable aspects of the Carnival of Podence is the Caretos, the main characters of this festivity, who are masked and costumed men who run through the streets of the village, brandishing sticks and chasing after young girls. Rodrigues et al. [1] depict these Caretos as embodying a rhythmic movement meant to delight and engage women.

The Caretos, adorned in vibrant red, green, and yellow wool costumes, are symbolic of the Carnival and a source of local pride. While the origins of this tradition are steeped in oral history, it has persisted through the ages, captivating visitors and enriching the region's cultural heritage [2].

The carnival has not only brought economic benefits to the region but has also helped to preserve its cultural heritage and traditions.

With the globalization of economies and the growing competition between localities to attract residents, visitors, and businessmen, there is an increasing need on the part of companies and organizations to reflect on the services provided to the customer. Cultural events became an option for those who found in the culture a way to escape the routine of everyday life, consuming art, customs, and music, among others [3, 4]. Satisfying the customer's expectations becomes paramount, as it uncovers strengths and areas for improvement.

In the realm of cultural events like the Podence Carnival, understanding and managing expectations are pivotal for satisfaction. Attendees anticipate experiences based on past encounters or promotional materials. Organizers must ensure that the festivity's execution surpasses these expectations through effective communication, meticulous planning, and flawless execution. This fosters a positive experience, boosting satisfaction, and loyalty.

In this research, we aim to analyze visitor satisfaction with the Podence Carnival and its attributes, underscoring its contribution to organizational success. The paper is structured as follows: Sect. 22.2 provides a theoretical framework discussing event experiences, satisfaction, and the Carnival's significance. Section 22.3 outlines our methodology. Section 22.4 presents and analyzes our findings. Finally, Sect. 22.5 offers conclusions drawn from this research study.

22.2 Theoretical Framework

22.2.1 *The Experience, Satisfaction, and the Importance of Cultural Events*

The tourism market is in a saturated and highly competitive state, which is why the satisfaction has gradually assumed a very relevant character in the sector. Satisfaction can be defined as the overall assessment that the client gives the service received compared to the service expected [5]. In the context of a competitive and saturated tourism market, visitor satisfaction gains crucial importance [6]. To facilitate regional development, tourism strategies must shift towards diversification and deconcentration, utilizing the potential of various regions and introducing alternative offerings. A strategic approach involves cultural events, such as festivals, which elevate the appeal of locations and attract a greater tourist influx [7]. This challenge extends to the cultural events' sector, demanding continual innovation and attractions to engage tourists. Festivals, deemed unique tourist magnets, contribute to destination development, economic growth, local pride, and community relationships [8]. Primarily, it should be noted that satisfaction is intrinsically related to living experiences, which in turn are linked to intimate characteristics of individuals, such as personality, perceptions, and desires [6]. In this sense, the tourists' choices are a consequence of their past experiences and their objectives; however, when expectations are not met, the result is dissatisfaction and the tourist's lack of interest in the destination and/or its attractions [6]. It hinges on attributes of the destination, including facilities and reputation, aligning with tourists' preconceptions before their visits.

According to [9], no matter if they are centred on sports, music, or art, live events are fundamentally about providing experiences. That is why many studies have placed experiences at the core of events. For leisure events and festivals to prosper and grow in the competitive festival landscape, organizers must prioritize crafting distinct and unforgettable experiences. This emphasis stems from the profound influence of visitor experiences on satisfaction, spending behaviour, and post-event actions, such as word-of-mouth and intent to revisit [9].

Experiences arise from the actions and interactions that occur during consumption, and they result in certain behaviours, attitudes, and opinions. Such experiences are multi-dimensional sensations that can be rational, emotional, sensual, physical, and spiritual in nature. As deeply personal and subjective phenomena, experiences are shaped by individual attributes like origin, values, interests, attitudes, and emotions. The intensification of individual experience dimensions augments the value derived from diverse events, culminating in holistic, lasting personal satisfaction that is exceptional, distinct, and unforgettable [9].

From the perspective of [10], satisfaction occurs when need and performance cross each other. In the context of cultural events, tourist satisfaction is associated to the level of importance of certain attributes, and how they correspond to tourist's expectations. It should be noted that when the tourist is satisfied with the attractions' context, the positive effects for the organization are many, namely with regard to

reputation, loyalty, increased productivity, external recognition, and attractiveness. It follows that assessing tourist satisfaction is a fundamental task, since it allows the organization to identify positive and negative aspects, as well as the characteristics to be improved for future editions [6]. In this context, the Importance–Satisfaction Analysis assumes a relevant role, as a method to identify which are and what degree of satisfaction generates the attributes of a given cultural event.

22.2.2 *The Carnival of Podence and Its Importance*

The Carnival of Podence is an important cultural event that takes place annually in the northeast region of Portugal.

As is known, nowadays the subject of sustainability is a very important and trending topic in all the fields. When it comes to tourism, it is the same: customers give such importance to sustainable ways of doing tourism, regarding the products, processes, or services related to the event or non-event that is calling tourists to it. The inclusion and envelopment of locals in the creation of authentic tourist experiences, and the proximity tourism it brings to the festivity, with people from the places nearby (e.g.: *Bragança*, *Macedo de Cavaleiros*, *Mirandela*) being the major part of the overall tourists [11], make the Carnival of Podence being viewed as a tourism event driven by sustainability.

This means that the Carnival of Podence not only provides a unique and authentic cultural experience for tourists but also does so in a way that is sustainable and beneficial to the local community. By involving locals in the creation of tourist experiences, the Carnival promotes a sense of community and fosters economic growth. Additionally, the proximity tourism it promotes reduces the carbon footprint associated with travel, further contributing to its sustainable credentials. Overall, the Carnival of Podence serves as a model for sustainable tourism practices and demonstrates the importance of considering sustainability in all aspects of tourism development. As customers increasingly prioritize sustainability in their travel choices, events and destinations that prioritize sustainability will be best positioned for long-term success.

The Caretos yield multi-faceted advantages. Pimentel et al. [11] highlight their role in job creation, counteracting rural exodus, nurturing socio-economic networks, enriching cultural and natural heritage, and enhancing local quality of life. This diverse impact prompted UNESCO to declare the Carnival of Podence an Intangible Cultural Heritage of Humanity in 2019. This recognition underscores the carnival's significance in bolstering local development and promoting a tourist destination [12].

UNESCO's endorsement amplifies the carnival's stature globally, celebrating its value as a cultural legacy to be cherished and shared. The recognition accentuates the importance of safeguarding and celebrating cultural heritage, reinforcing the essence of traditions in shaping our communal identities.

22.2.3 The Importance of Understanding the Satisfaction of Visitors with the Carnival of Podence

Comprehending visitor satisfaction with the Carnival of Podence is pivotal for upholding and enhancing the event's quality and reputation. Positive feedback serves to draw more visitors, boosting the festivity's economic influence on the region. It also offers invaluable insights into the aspects that participants and attendees value most. Conversely, negative feedback identifies avenues for improvement, addressing any concerns impacting overall participant satisfaction. This input empowers organizers to make well-informed decisions in planning and executing future editions, ensuring that the Carnival remains a cultural pinnacle of the region and a source of community pride. Hence, understanding satisfaction with the Carnival of Podence is imperative for its continued success and expansion [6].

Beyond this, comprehending visitor satisfaction contributes to promoting cultural diversity and conserving local traditions. The Carnival, a centuries-old cultural event, furnishes a platform for showcasing distinctive local customs and traditions. Monitoring participant and visitor satisfaction, as noted by Faria et al. [6], ensures that these traditions are respected and enjoyed by all. Furthermore, understanding satisfaction fosters cultural exchange and understanding, enriching the experience for visitors from diverse backgrounds who can learn and appreciate local culture. In this way, understanding the satisfaction with the Carnival of Podence is not only important for the success of the event, but also for promoting cultural diversity and preserving local heritage [13].

In conclusion, understanding visitor satisfaction with the Carnival of Podence is pivotal in enhancing event quality, amplifying economic impact, pinpointing areas for enhancement, and measuring promotional effectiveness. Ergo, prioritizing visitor feedback is paramount for sustained success of the event.

22.3 Research Methodology

The objective of this research is to analyze the importance and satisfaction expressed by visitors to the Carnival of Podence regarding its attributes.

For this, the sampling process used was simple random sampling with the application of the questionnaire to the visitors. The target population of the present study is made up of the nearly 50,000 visitors of the Carnival of Podence festivity who was there on February 26 and 27, 2022. The Likert scale questionnaires were personally distributed and collected on those days to visitors who had expressed an interest in participating in the study, following an explanation of the study's purpose. The attributes analyzed were the following: dissemination of the festivity, place, welcome/hospitality, local gastronomy, promotion of the festivity through souvenirs, surrounding/social environment, festivity-related leisure activities, and global level of importance/satisfaction.

Attribute of importance	High	Quadrant A Concentrate here: Attributes to improve	Quadrant B Keep up the good work: Attributes to maintain
	Low	Quadrant C Low priority: Attributes to maintain with low priority	Quadrant D Possible overkill: Attributes to de-emphasize
		Low	High
		Attribute of Performance	

Fig. 22.1 Importance–performance matrix. *Source* Adapted from Martilla and James [14, p. 78]

In order to reach the study’s objective, Importance–Performance Analysis (IPA) [14] has been used. This is a simple but effective tool that analyzes and crosses the variables importance and performance [15] and guides companies to identify strategic options to increase competitiveness [16].

Importance and performance are then integrated into a matrix that guides companies to identify strategic options to increase competitiveness [16]. Hence, the Importance–Performance Analysis allows, through a representation in a Cartesian reference, to identify the areas where an organization should concentrate, reduce, or maintain its efforts and also evaluate the areas where the greatest deviations occur between what is important for the individual and what he is getting. The importance axis represents the level of significance that customers place on a particular attribute or factor, while the performance axis represents how well the organization is currently meeting those expectations. By plotting these two variables, the matrix helps organizations to identify areas that require improvement, as well as those that are performing well and can be leveraged to gain a competitive advantage.

In Fig. 22.1 it is possible to visualize what has just been mentioned, emphasizing that by crossing the variables importance and performance, four quadrants are obtained that allow to outline four strategies, namely [14, 15]:

1. Quadrant A—*Concentrate here—attributes to improve*, position where individuals perceive a given attribute to be very important, but its performance is not satisfactory, so the attributes located in this quadrant represent the main weaknesses of an organization;
2. Quadrant B—*Keep up the good work—attributes to maintain*, where individuals perceive that a certain attribute is very important and are satisfied with their performance, which makes the attributes of this quadrant can be considered as opportunities to achieve or maintain the competitiveness of organizations;
3. Quadrant C—*Low priority—attributes to maintain with low priority*, represents that individuals are not satisfied with the performance of this attribute but do not consider it important either, it has low importance and low performance, so these attributes do not require additional efforts;

4. Quadrant D—*Possible overkill—attributes to de-emphasize*, in which individuals are satisfied with the performance of attributes but do not consider them important, have high performance, but little importance, which indicates that the resources used with these attributes are excessive and should be directed to other attributes.

It should be highlighted that in this study, the Importance–Satisfaction Analysis (ISA) tool will be applied with support from the Importance–Performance Analysis (IPA), where performance is replaced by satisfaction. ISA presents a 2×2 attribute matrix, based on high or low importance and high or low satisfaction [17].

22.4 Results and Discussions

To better understand the profile of respondents in terms of some sociodemographic characteristics, a descriptive statistical analysis was performed. In this analysis, distribution measures are presented absolute (number of responses) and relative (percentage of responses) of the primary data collected, since all the variables analyzed are qualitative. Regarding gender, only one respondent answered *I prefer not to say*, while there is a homogeneous distribution with respect to the *female* (54.5%) and *male* (45%). This same homogeneity is also present in the distribution of age groups. As for nationality, it appears that the majority of respondents (94.5%) are of *Portuguese* nationality, residing mostly in the municipalities of *Macedo de Cavaleiros* (12.0%), *Bragança* (8.0%), and *Porto* (6.0%). Along with other countries portrayed in the table, it is perceived that 67.5% of respondents are from the North Zone of Portugal. It stands out that there is a percentage of 54.5 of respondents who have completed *higher education*. As for the question of gross monthly family income, 32.5% of respondents claim to have an income of *up to 1000 euros*, while 10.8% of them report having an income of 3000 euros or more. It should be noted that 43.8% of respondents reported being accompanied by their *family*, followed by *friends* (24.9%) and *spouse* (23.6%). Likewise, it is highlighted the fact that most respondents (59.3%) stated that they stayed just *less than one day* in the festivity, as well as 59.3% of respondents reporting having accommodation in their *own home* and 87 of respondents did not answer the question of accommodation, which may be due to the fact that most respondents are from the North Zone, as previously mentioned, and thus, do not need accommodation. Finally, it should be noted that only two respondents mentioned having become aware of this festivity through *outdoor posters*, against the 48 respondents who claim to have always known about this festivity, the 45 who said that it had been recommended to them, the 44 who claim to have learned about it through the internet, and the 43 who did so through the television.

Table 22.1 presents the results obtained for each attribute defined previously and for the importance and satisfaction dimensions, both measured on a 5-point Likert-type scale, where 1 is the most negative extreme and 5 is the most positive.

As it is possible to observe through Table 22.1, the attributes that visitors mentioned as being the most important and consequently those with higher averages for importance are: *reception/hospitality* ($\bar{x} = 4.45 \pm 0.722$ points), *surrounding/social environment* ($\bar{x} = 4.41 \pm 0.653$ points), and *local gastronomy* ($\bar{x} = 4.35 \pm 0.785$ points). On the other hand, the less important attribute for the visitors of this festivity was the *promotion of the festivity through souvenirs* ($\bar{x} = 3.84 \pm 1.088$ points).

In the evaluation of the quality of the festivity's inherent attributes, the ones that presented the highest satisfaction were: *local gastronomy* ($\bar{x} = 4.48 \pm 0.734$), *reception/hospitality* ($\bar{x} = 4.47 \pm 0.689$), and the surrounding/social environment ($\bar{x} = 4.44 \pm 0.866$). In contrast, the attribute with which visitors are least satisfied is *festivity-related leisure activities* ($\bar{x} = 3.89 \pm 0.918$).

When analyzed graphically through an analysis of the quadrants as can be seen in Fig. 22.2, these values allow a more detailed analysis of the areas with better performance/satisfaction, as well as the importance given to each attribute by visitors to this carnival.

Table 22.1 Summary of the results of the Importance vs. Satisfaction Analysis

Attributes	Performance/satisfaction		Importance		Quadrant
	Mean ($\bar{x}$)	Standard deviation (SD)	Mean ($\bar{x}$)	Standard deviation (SD)	
Dissemination of the festivity	4.11	0.850	4.29	0.917	A
Place	3.98	0.852	4.05	0.988	C
Welcome/hospitality	4.47	0.689	4.45	0.722	B
Local gastronomy	4.48	0.734	4.35	0.785	B
Promotion of the festivity through souvenirs	4.08	0.988	3.84	1.088	C
Surrounding/social environment	4.44	0.866	4.41	0.653	B
Festivity-related leisure activities	3.89	0.918	4.08	0.962	C
Global level of importance/satisfaction	4.37	0.814	4.27	0.843	D
Median	4.24		4.28		

Source Authors' own elaboration

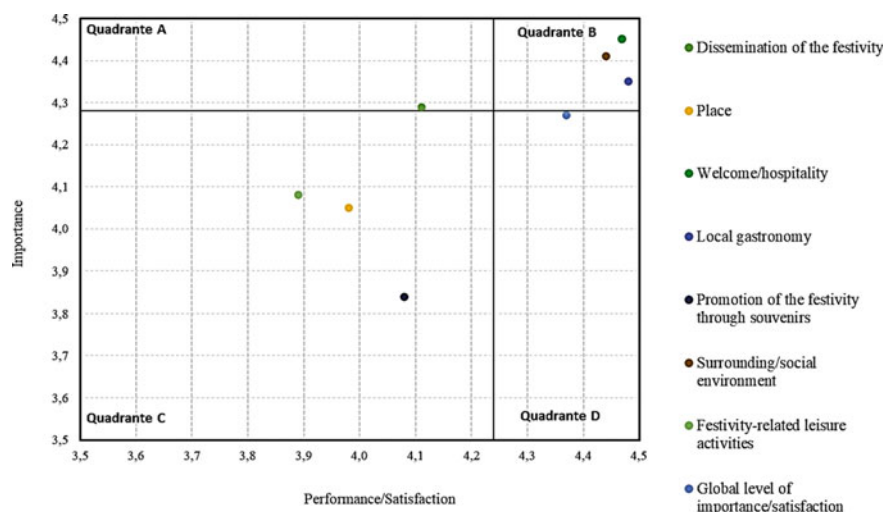


Fig. 22.2 Importance–performance/satisfaction matrix of carnival of Podence attributes

It is possible to observe that the attributes *place*, *festivity-related leisure activities*, and *promotion of the festivity through souvenirs* are in Quadrant C, which means that individuals give them low importance and low satisfaction, meaning that the organization should not put additional efforts when it comes to these attributes.

Also, the attribute *global level of importance/satisfaction* is placed on Quadrant D, which means that individuals do not consider it important, but are satisfied with its performance. As this attribute is located in this quadrant, the organization should de-emphasize it. However, it has to have some attention, since it is very close to the Quadrant B's line, meaning that this attribute is not so unimportant for the individuals.

In Quadrant A is placed the attribute *dissemination of the festivity*. This means that this is an attribute to improve, since individuals perceive it as having high importance, but its performance is not satisfactory for them.

Finally, the attributes *welcome/hospitality*, *local gastronomy* and *surrounding/social environment*, placed in Quadrant B, should maintain their performance, once individuals perceive them as very important attributes and are also satisfied with their performance.

22.5 Conclusions

In our interconnected and competitive world, businesses must develop strategies to meet visitor expectations and surpass competitors, requiring a deep understanding of visitor preferences and satisfaction. By gaining insights into visitor requirements, companies can tailor their offerings to gain a competitive advantage. This requires a

thorough understanding of visitor satisfaction, including the factors that drive loyalty and retention. Therefore, the regular collection and analysis of visitor feedback are essential for improving products, services, and the overall visitor experience. Furthermore, in a constantly evolving event landscape, event planners, as per [18], must continually innovate to set their events apart and provide an extraordinary experience for visitors.

To this end, this research adopts the ISA matrix derived from the IPA, a tool enabling organizations to identify areas needing improvement and those excelling, fostering a competitive edge. The study's focus is the Carnival of Podence, drawing numerous visitors to a village in Northern Portugal. This sustainable festivity bears immense significance for Podence, driving benefits like job creation, combating rural exodus, and preserving cultural and natural heritage.

The results of the ISA matrix allowed to identify that the attributes *reception/hospitality*, *local gastronomy*, and *surrounding/social environment* are of extreme importance for visitors and are aspects where the organization of the carnival performs well and should keep the good work. These attributes should, therefore, be considered as opportunities to achieve or maintain the competitiveness of organizations.

In addition, it was concluded that the *dissemination of the festivity* attribute should have more attention by the organization, since it is considered extremely important for the visitors, but they are dissatisfied with its performance. So, this attribute can be considered the main weakness of the organization of this festivity.

On the other hand, the organization should not put much effort on the attributes *festivity-related leisure activities*, *place* and *promotion of the festivity through souvenirs*, and *global level of importance/satisfaction*, since that these are attributes that are not very important for visitors.

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Chapter 23

Nutrition Software to the Management and Support of Health and Wellness Tourism: An Approach



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Abstract Nutrition is a complex field that assesses the relationship between foods, their nutritional composition and their impact on health and disease. In Portugal, there are around 4000 nutritionists, with 90% employed or self-employed. These professionals work in large collective catering groups and sport, with a growing focus on sports. This proposal aims to develop a nutrition management platform that increases efficiency by visualising and making decisions based on data. The platform will facilitate communication and interaction between citizens, encourage sports practice and promote tourism through events promoting health and well-being, as well as the local gastronomy. This approach will enable the promotion of tourism based on people's health and quality of life, aiming to improve the nutrition of the general population.

23.1 Introduction

Nutrition is an area of health that is dedicated to assessing the relationships between foods, their nutritional composition and their impact on health and disease. It is a complex area that contains a lot of information and variables that the professional uses to make the best decision for their patient.

According to the Order of Nutritionists [1], there are about 4000 nutritionists in Portugal, of which 385 are linked to the National Health Service. It can therefore be deduced that 90% of nutritionists are employed or self-employed. It is also reported

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that these 90% work in the area of large collective catering groups and currently in areas related to sport, which has shown great growth.

However, all that is involved in the area is a set of information (data) specific and organised for a given context that can give meaning and relevance, allowing the professional to understand and use it in decision making.

This data processing can greatly benefit from the technological evolution seen in recent years, particularly in terms of applications dedicated to data management and processing, whether web or mobile applications. Indeed, technology has been instrumental in areas such as tourism [2, 3], health [4, 5] and well-being [6].

This proposal aims to develop a nutrition management platform that allows professionals to increase their efficiency by visualising and making decisions based on the data presented. The platform is intended to facilitate communication and interaction between citizens and encourage them to practice sport in the community, promoting tourism through events. These events consist of physical activities that promote the improvement of people's health and well-being, as well as the promotion of activities related to nutrition. In fact, it will allow the contact of the practitioners with health professionals (in this case nutritionists), who will be able to analyse and explain to them the results obtained, as well as strategies to be adopted to improve possible problems found [7].

This approach will enable the promotion of community tourism [8], in this case more specifically based on people's health and quality of life, as well as gastronomy, seeking an improvement in the nutrition of the general population.

23.2 State of the Art

This section summarises the area of nutrition, its importance, the subtypes within nutrition and how it has evolved.

23.2.1 *Nutrition*

Nutrition is an area of health that is dedicated to assessing the relationships between food, its nutritional composition and its impact on health and disease. With the increase in the average life expectancy of the population and the increase in the elderly age group in Portugal, a good diet becomes essential as it helps to improve health, such as the prevention of a series of diseases (chronic and non-chronic). These diseases can range from hypertension, diabetes, cardiovascular diseases to cancer. According to the Order of Nutritionists [9], cerebrum-cardiovascular diseases are responsible for 30% of all deaths in the country. In fact, hypertension affects about 36% of people and the prevalence of diabetes is about 10%. This profile, in the medium and long term, imposes a greater financial strain on the National Health Service (NHS).

A study by the OECD [9] (Fig. 23.1) shows that Portugal is one of the countries with the highest percentage of overweight/obesity in adulthood compared to the countries under study. This is a serious problem that can lead to the diseases mentioned above.

In childhood, according to statistics from COSI Portugal [10], there was a decrease in overweight (including obesity) children aged 6–8 years between 2008 and 2019. The indicators in Fig. 23.2 are able to show perspectives based on different studies across an age range.

It is possible to observe that at ages between 6 and 8 years old there has been a decrease over 11 years, but that it is still high and this goes on to the following ages, with overweight (including obesity) in the 15-year age group, coming in agreement with the previous statistics, in which we saw the adult phase, we found ourselves as one of the largest countries with overweight/obesity.

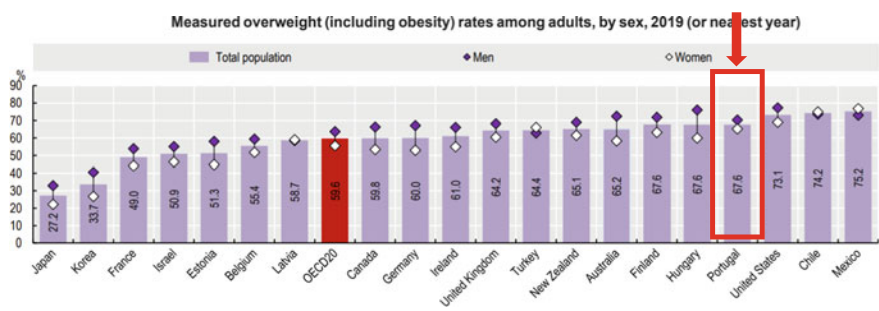


Fig. 23.1 Measurement of overweight (including obesity) in adults, by gender, 2019

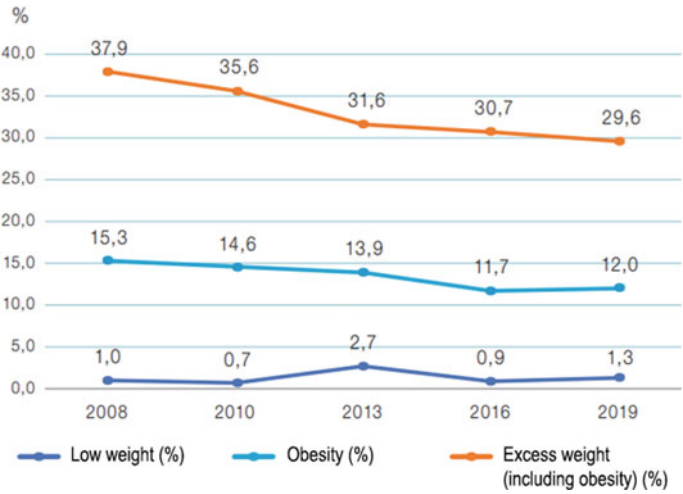


Fig. 23.2 Prevalence of childhood underweight, overweight (inc. obesity) and obesity

23.2.2 Subtypes of Nutrition

The area of nutrition is large and is composed of some subtypes, dividing the way each information is treated to help the professional.

Within the scope of nutrition there are several areas of activity, such as Clinical Nutrition; Collective Food and Catering; Community Nutrition and Public Health, among others.

According to a survey carried out in 2019 by the Order of Nutritionists [11], the area with the highest professional performance is Clinical Nutrition with 61.5% (Fig. 23.3). Clinical Nutrition is the area dedicated to both food correction and education and to the treatment and monitoring of specific pathologies and conditions.

As shown in Fig. 23.3, Clinical Nutrition is the area with the highest employability in nutrition. It should be noted that this was already the case in 2015 and has increased until 2019. This allows more room for a diverse range of platforms and tools to solve existing problems in the area.

Investing in nutrition and food education is a long-term investment for a better quality of life. This idea reinforces once again that the investment of platforms to support professionals can become an asset for them.

All the data presented above are intended to show the feasibility of the proposal to create a Nutrition Consultation Management platform. The platform is intended to target nutrition professionals who work on their own or for companies. Based on Fig. 23.4, we can see that more than half of the professionals working in the Clinical Nutrition sector correspond to the private sector.

The main objective of the platform will be to respond to the needs that the area of Clinical Nutrition brings, from the management of consultations, food planning, recording of measurements taken, sending emails, creating customised templates, etc.

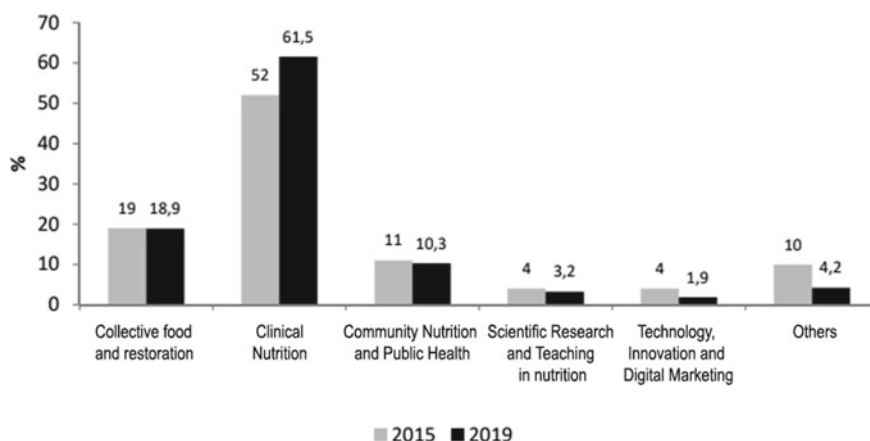


Fig. 23.3 Comparison of occupancy of nutrition areas in 2015 compared to 2019

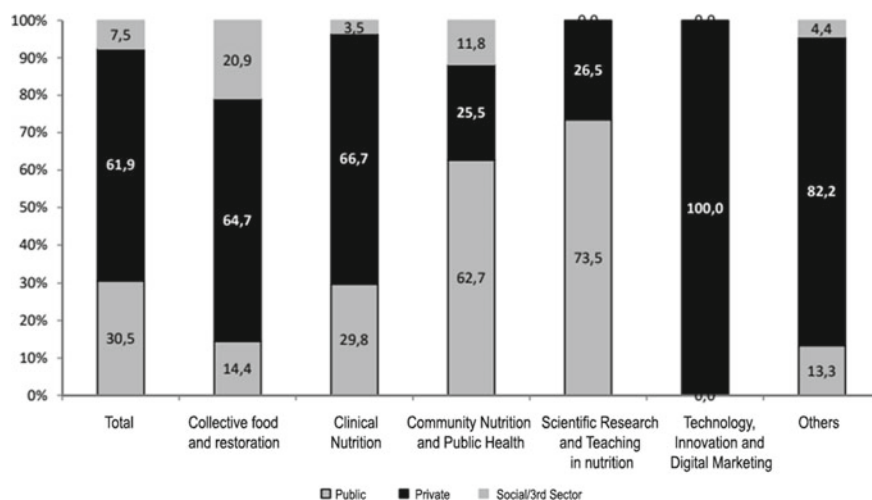


Fig. 23.4 Sector of occupation of nutritionists

23.2.3 *The Application of Technology in Nutrition*

Technology has evolved very significantly in recent years. This evolution ranges from sensors for monitoring people's parameters to applications dedicated to their treatment. The field of nutrition has also taken advantage of the benefits brought by technology.

In this section, we will show some existing programmes in the market to support Clinical Nutrition, the capabilities they provide and small comparisons between them.

Within this business area it is possible to find some solutions already implemented, such as Nutrium [12], Softdiet [13], Sanut [14], Avanutri [15], among others.

Table 23.1 compares some existing applications with the proposal presented. (The acronym "des" corresponds to the description of "Unknown". A search for functionalities was carried out among the applications, but it was not possible to verify whether the application performs this functionality or not).

23.3 Proposed Solution

Based on the study carried out in the previous sections, a nutritional software is proposed to help professionals in the field of Clinical Nutrition to perform existing tasks more efficiently, as well as to assist in decision making.

Table 23.1 Comparison of functionalities between applications

	Proposed solution	Nutrium	Softdiet	Sanut
Appointment Management (Scheduling, creation, modification and cancellation of appointments)	X	X	X	X
Personal patient registration by the user	X	X	X	X
Recording and personal history of patient measurements by the user	X	X	X	X
Creation of customised templates for consultation records	X	Des	Des	Des
Patient progress statistics	X	X	Des	X
Creating food plans	X	X	X	X
Creating personalised templates for food plans	X	Des	Des	Des
Calculation and recommended daily doses in the plans	–	Des	Des	X
Food plans sent by email	X	Des	X	Des
IOS and Android patient app	–	X	X	Des
User application	X	X	X	Des
IOS and Android user app	–	X	X	Des
Chat between user and patient	–	X	X	Des
User statistics (enquiries made weekly, monthly, New clients, objectives met, etc.)	X	X	Des	Des
Database with food composition	–	Des	X	X
Recipe book at the patient's disposal	–	X	Des	X
Export of user data	X	Des	Des	X

23.3.1 Objectives

This software designed for Clinical Nutrition aims to develop functionalities previously studied based on previous applications and the knowledge of professionals in the field.

The software will respond to the following needs: management of the scheduling of appointments; personal registration of the patient by the nutritionist; registration and personal history of the patient by the nutritionist; statistics of the patient's progress; Consultation Management; Food Plan Management; creation of templates for consultations and food plans; dashboard for the nutritionist.

23.3.2 *Architecture*

For the construction of the proposed platform, a microservices architecture was chosen [11, 16]. This type of architecture has received increasing attention, and more companies are starting to develop applications with this architecture. Examples include Amazon, Netflix, LinkedIn, Spotify, among others.

The characteristics that this architecture provides and that justify its choice were (1) organisation of the system around the business; (2) automatic deployment; (3) endpoint intelligence; (4) decentralised control of languages and data.

The nutritional software will be divided into modules. These modules served to separate the development and logic by business areas. The user module will be responsible for the creation and validation of a user application. The scheduler module will be responsible for the user schedule. The application user will be capable to manage your consults (Ex: Create or Cancel a consult). The patient module will be responsible for the user to manage your patients. Register their personal and medical information. The consult module will be responsible for the user to manage the patient consults. Register their achievements and metrics. Evaluate their goals and adjust if necessary. At some point, depending of the number of consults the user will be able to see a progress journey of a patient. The food plan module will be responsible for the user-patient food plans. The user can personalise food plan for each patient. When the food plan is finalised, then a mail will be sent to the patient. The extract module will be responsible for extract the application information, for example, export consults, users, etc. The module will be responsible for consume and populate specific logic of each module to feed dashboard to the user and user patient. This module will be responsible for consume and populate specific logic of each module to feed dashboard to the user and user patient. The gastronomy module will help the food plans module to create the best plans promoting the gastronomy of certain region, promoting tourism in that region (Fig. 23.5).

23.3.3 *Technology*

For the development of this software, which will be subdivided into Frontend and Backend. At the frontend level, ReactJS [17] will be used. ReactJS is a JavaScript framework that is used for the development of interfaces or web pages. It consists of building components that can be reused anywhere on the page. This will allow reusing components increasing the speed of development of the platform.

On the backend, NestJS [18], a framework based on NodeJS, will be used. It can be fully compatible with TypeScript, which allows elements such as Object-Oriented Programming (OOP), Functional Programming (FP) and Functional Reactive Programming (FRP). Nest provides an out-of-the-box application architecture that allows developers and teams to create highly testable, scalable, loosely coupled and maintainable applications.

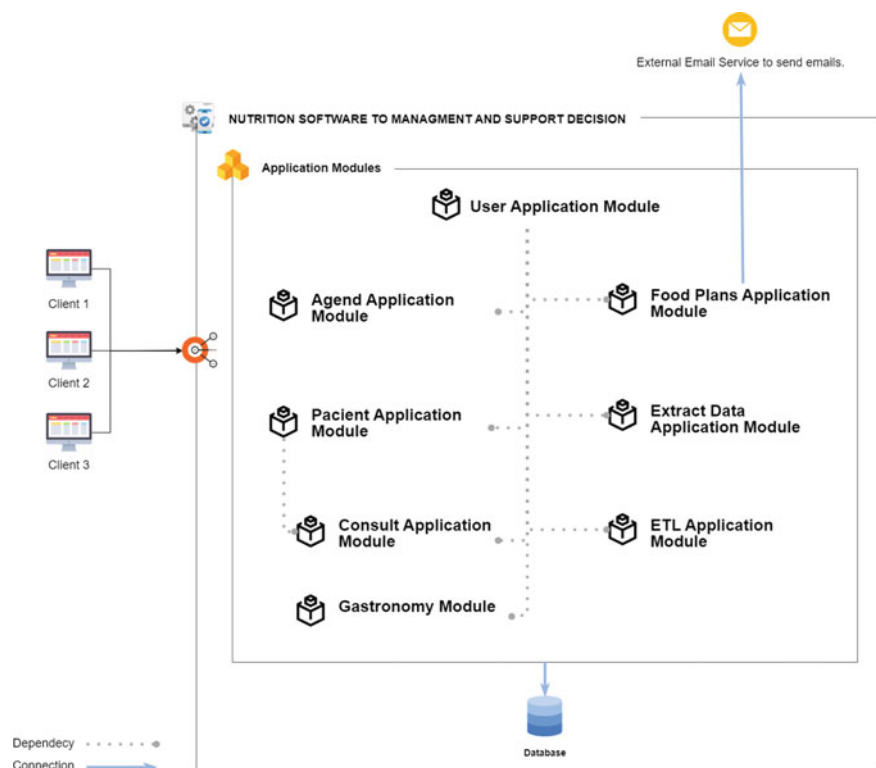


Fig. 23.5 Architecture of the solution

23.4 Discussion

Based on the initial study, it was possible to verify that overweight (including obesity) in Portugal is very high. In fact, a 2019 study shows a value of overweight (including obesity) in adults, by gender, of 67.6% (against 59.6% of the OECD average²⁰).

According to statistics from COSI Portugal [10], there was a decrease in overweight (including obesity) in children aged 6–8 years between 2008 and 2019 (37.9% in 2008 to 29.6% in 2019 for overweight and 15.3% in 2008 to 12.0% in 2019 for obesity), which shows a favourable outlook. However, in the 15-year age group, considering overweight (including obesity), Portugal (22%) is one of the largest countries with overweight/obesity (18.3% OECD²⁷), 2017–2018.

A 2019 study shows that Clinical Nutrition is the most utilised sub-area of Nutrition, with 61.5%, followed by Collective Food and Catering (18.9%) and Community Nutrition and Public Health (10.3%). Clinical Nutrition showed an increase of 9.5% between 2015 and 2019, with its majority use in the private sector (66.7%). The main objective of the platform will be to respond to the needs that the area of Clinical

Nutrition brings, from the management of consultations, food planning, recording of measurements taken, sending emails, creating customised templates, etc.

A study was made to find some solutions already implemented, such as Nutrium, Softdiet, Sanut, Avanutri, among others. Based on this study it was concluded that none of the applications includes all the desired functionalities, validating the need for the presented solution. The solution presented has been well criticised by the nutritionists participating in the study. In addition to the purely nutritional issue, it is also intended to develop the area of tourism, more specifically health and wellness tourism, promoting events and using the application to perform the nutritional analysis of the participants, improving their diet and, at the same time, boosting tourism in the region where the event takes place, promoting their gastronomy.

23.5 Conclusion

The concern for a healthy lifestyle has led to a significant increase in sports practice. Accompanying this increase is also the concern with food itself, with an increasing demand for monitoring people's daily diet. In this sense, nutritionists play a fundamental role in monitoring people, identifying their wrong eating behaviours and creating plans to greatly improve the quality of people's diets, thereby improving their health.

The emergence and widespread use of technology, from sensors for monitoring people's parameters to applications for their treatment and analysis, contribute significantly to helping improve the care provided by nutritionists and the monitoring of plans by people themselves.

This article studies the main existing solutions, identifies the shortcomings and, based on this study, proposes a solution to solve the problems encountered.

In addition to the component directly linked to nutrition, the proposed solution aims to contribute to facilitate communication and interaction between citizens and encourage them to practice sport in the community, to share experiences related to nutrition and, through the creation of events, to promote tourism related to well-being, quality of life and gastronomy. Apart from the information related with the nutrition component, the platform will allow the contact of the practitioners with health professionals, who will be able to analyse and explain to them the results obtained, as well as strategies to be adopted to improve possible problems found.

This approach will also enable the promotion of a type of tourism based on people's health and quality of life, driving forward a shared economy. The platform's importance in weight loss and healthy lifestyle promotion is evident through contact with people. It also plays a crucial role in tourism, as proposed events attract a wide range of people to the regions they occur in, publicising, for example, its gastronomy. The platform is currently in development phase, with the first results obtained shown in this proposal paper.

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Chapter 24

Backpackers' Space–time Behaviour in a World Heritage City—Porto



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Abstract Urban tourism is one of the most popular forms of tourism, but it remains an understudied phenomenon, particularly in terms of tourists' spatiotemporal behaviour. The aim of this research is to analyse the spatiotemporal behaviour of the backpacker tourists in an urban destination classified as World Heritage. Data collection was done through a questionnaire survey ($n = 292$) and a GPS App to track backpacker tourist movements ($n = 82$) during a visit day to Porto, Portugal. All the thematic cartography was developed with QGIS 3.2.0 software. A map with the movements performed by all backpacker tourists; a map with the intensity of the backpacker movements (passages by area, 50×50 m) and a map with the distribution of the total length of stay by area (50×50 m), allowed the identification of the main hotspots as well as the non-visited territories in Porto urban area. Relevant contributions for destination managers are presented and discussed.

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24.1 Introduction

The aim of this research is to analyse the spatiotemporal behaviour of the backpacker tourists in an urban destination classified as World Heritage. Where tourists go?, what they do?, how long they stay in the visited attractions?, what means of transport do they use? or which routes do they choose to take? are some of the many questions that research on the spatiotemporal behaviour of tourists has been exploring and answering. According to the literature, research focusing on tourists' spatiotemporal behaviour can give numerous theoretical and managerial contributions, influencing destination planning and management [2, 19], developing support and transport infrastructures, developing tourism products, marketing strategies and commercial viability of tourism activities and the improvement of destinations image [4, 46]. Studying tourists' space–time behaviour can also promote the dispersal of tourists within a region, contributing to generate and redistribute tourism income in the local economy, to manage traffic flows and reduce the negative environmental impacts of tourism [27]. Therefore, give relevant contributions to the management of social, environmental and cultural impacts of tourism activity [4, 46], namely in urban destinations. In urban destinations with problems related to over tourism and gentrification, such as Barcelona, Venice or Lisbon, can also contribute to a greater dispersion of tourists and to identify the main hotspots, developing effective measures to better manage visitor flows and limit access to specific urban areas [1].

This research was one of the first to study the spatiotemporal behaviour of tourists in Portugal using GPS technology (GPS app). The literature review focuses on backpacker tourism and backpacker tourists and tourists' spatiotemporal behaviour. After the description of the methodology used in the data collection and in the construction of the thematic cartography, the analysis and discussion of the results obtained is carried out. Important contributions for those responsible for destination management are presented and discussed in the conclusions.

24.2 Literature Review

24.2.1 *Backpacker Tourism*

In the context of travel among young people, backpacker tourism has assumed relevance and is considered by Cohen [10] as one of the predominant trends of contemporary tourism, evidenced by the increase in the number of young people travelling annually across the planet [11]. Martin and Costa [33] highlight the lack of consensus and inconsistencies between scholars due to the lack of a uniform criterion for operationalising the definition of backpacker. For this research “Backpacker tourism comprises the activities carried out by a complex and heterogeneous group of travellers, consisting predominantly of young people who travel for longer periods than usual and with flexible and informal travel itineraries” [29], p.1). Backpackers are

frequently described as predominantly young travellers, with an emphasis on meeting other travellers and with independent and flexible travel arrangements. They have a preference for longer holidays and are more likely to stay in budget accommodation. Several segments have been identified in the literature (see, for example, [33] however, for operationalisation reasons, and following the [48], p. 1) a backpacker is “a person who spends one or more nights in a backpacker’s house or hostel”.

All tourists are driven by one or more motives when planning and undertaking their trips. In their book “The Psychology of Leisure Travel”, [34] states that motivation is the ultimate guiding force, characterised by internal motives of a psychological nature, which explains individual actions. Therefore, backpacker tourists are a heterogeneous market [28, 44]. Oliveira-Brochado and Gameiro [39] have concluded that there is an emerging diversity and growth in the heterogeneity of backpackers’ preferences, who are known as tourists who enjoy different types of experiences during their visits. Backpacking is thus a heterogeneous phenomenon in terms of motivations and meanings. One of the main reasons for travelling backpacker style is to build a new temporary identity while travelling, to be more courageous and independent [9, 16, 38]. Several studies also highlight the cultural knowledge as one of the most important motivations for backpackers to travel, with an emphasis on contact, knowledge and understanding of the visited cultures, history and local societies [8, 26]; and the exploration of other cultures associated with increasing knowledge [23, 24, 41]; the search for authenticity is further noted by Gibson and Connell [21].

Therefore, it is expected that this market segment, known for appreciating different types of experiences during their visits, will look for cultural attractions and activities in the visited destinations, such as museums, artistic and monumental heritage, cultural activities associated with intangible heritage, such as music, gastronomy and wines, among others.

Backpackers often seek greater contact with what is local or typical of the cultures of visited destinations and try to experience local life experiences [9].

24.2.2 Tourists’ Spatiotemporal Behaviour

If in the past, several researches on the spatial and temporal behaviour of tourists have been carried out in a multi-destination context, i.e. of several destinations, more recently, the tourist movements in the perspective of intra-destination trips, especially in urban destinations, have become of interest to several researchers [5, 7, 20, 31, 47]. But as Hunt and Crompton (2008) point out, most tourist trips are not made to a single attraction in the destination, so it is essential to understand the movements made by tourists in a multi-attraction destination, or in other words, how tourists consume the urban space they visit, from attraction to attraction and from activity to activity [4].

Some researchers have also analysed the spatial and temporal behaviour of visitors in enclosed spaces with defined boundaries, i.e. intra-attraction level, where tourist

behaviour is much more controllable [50], such as sports events [43], festivals [53], zoos [51], among others. Others explore more the methodologies and the reliability of the data collection methods. As mentioned by Ferrante et al. [19], the spatiotemporal behaviour of tourists has been analysed from different perspectives, considering the scale of analysis of the movements performed (inter-destination, intra-destination or intra-attraction), the geographical scale of the visited area and the main determinants of tourist mobility. Regarding the main determinants of tourist mobility, Grinberger et al. [22] emphasise those who have focus on destination choices, on tourist experience, on tourist segmentation and on destination consumption by tourists, also referring to several other factors, such as the cultural origin of tourists [13], tourists visiting the destination for the first time and repeaters [6, 17], special interests of tourists [18], the first and last day of visit [35] and the sociodemographic characteristics of tourists, such as age, gender, income and education [4, 30]. Other research focuses on tourist satisfaction [4], the impact of distance travelled from the country of origin [3] and environmental sustainability [14, 15]. Therefore, with few exceptions [30–32] no research has yet addressed the spatiotemporal behaviour of backpackers during their visit to an urban World Heritage destination.

24.3 Methodology

Data collection was done through a questionnaire survey ($n = 292$) and a GPS App to track backpacker tourist movements ($n = 82$) during a visit day. In this analysis, it was used the data from the questionnaires of visitors who agreed to have their movements tracked [30, 33]. To identify the exact movements and routes followed by the participants, it was used a GPS app available on the market and free of charge (i.e. Open GPS Tracker). The GPS app recorded the distance (km), the time (min), the speed (km/h), the position (latitude and longitude) and the direction of movements. Data collection was carried out in 2017, between July 16 and December 11, in several hostels located in Porto, Portugal. The historic centre of Porto was classified in 1996 by UNESCO as a World Heritage site. Porto as a destination offers a wide array of wine tourism experiences, shopping, sightseeing and pleasure tourism experiences [32] and is the main gateway to the north of Portugal where several attractions/destinations can be found: Douro Valley (UNESCO World Heritage), several cities such as Braga, Viana do Castelo and Guimarães (UNESCO World Heritage), National and Natural Parks such as Gerês and Alvão, Foz Côa Archaeological Park (UNESCO World Heritage), among others [12]. The georeferenced data were analysed using QGIS 3.12.2 software, a free and open-source geographic information system (GIS). The spatial and temporal analysis of backpacker tourist movements was carried out through i) the production of a map with the movements made by all the tourists tracked (Fig. 24.1; ii) the production of a map of the intensity of the backpacker movements, through the accounting of their passages by area (50×50 m as suggested by Shoval [45] and iii) the production of a map with the distribution of the total length of stay of backpackers by area (50×50 m).

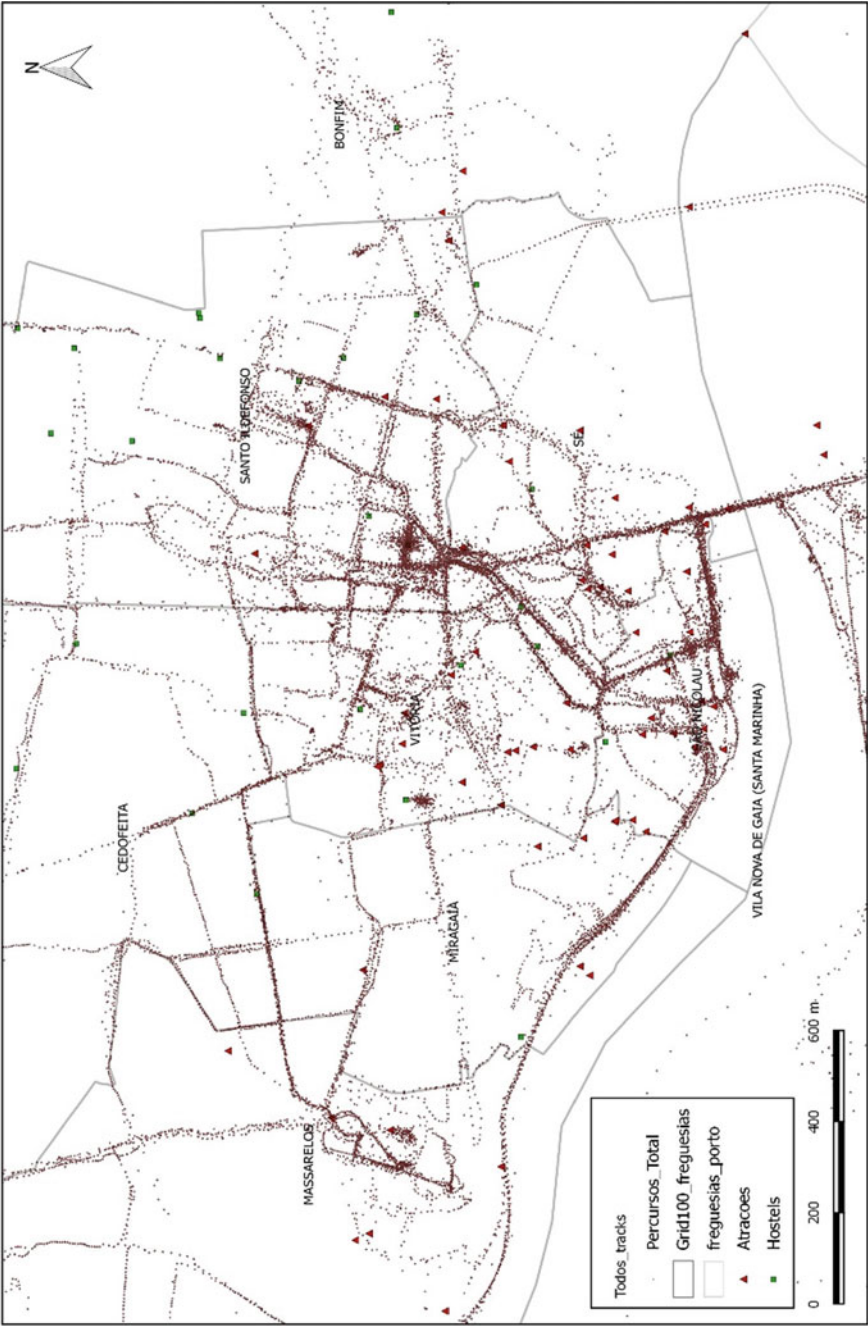


Fig. 24.1 Backpacker tourist movements tracked in the urban centre of Porto [30]

24.4 Analysis of Results and Discussion

24.4.1 Sociodemographic

Of those who answered the questionnaire ($n = 292$), only 82 backpackers (28%) agreed to successfully track their movements during a day's visit to the city of Porto. Of these, 39 are female (47.6%) and 43 (52.4%) male, mostly single (70.7%) or in a relationship without marriage (22%), having a high level of education (approximately 83% have a higher or postgraduate education), and working full-time (50%) or part-time (9.8%), although the percentage of students is still relevant (29.3%). Being a group of young tourists, with an average age of 26.6 years, annual incomes are relatively high: of the 68 tourists who answered this question, 48.5% stated that they earn an income of more than 20 thousand euros per year. Regarding nationality, the vast majority come from European countries (68.3%) with Germany being the most represented country, followed by countries from America (23.2%) and East Asia and Pacific (8.5%) where Australia stands out.

Many backpackers who agreed to do GPS tracking with their smartphone are long-term backpackers (25.6%) and Flashpackers (25.6%). They are followed by global nomads with 17.1% and short-term backpackers with 12.2% (see [30] for more details). The remaining sub-segments have little representation. Given the great diversity of backpacker sub-segments and the small number of individuals belonging to them, it was considered pertinent to group them into the following typologies, according to [33] proposal: short-term backpackers ($n = 39$) which also included Party backpackers and Study backpackers, long-term backpackers ($n = 8$) which also included backpackers who are doing volunteering, Gap Year Backpackers and University Gap Traveller; technological backpackers ($n = 21$) which included Flashpackers and Holiday Backpackers; and more travelled backpackers ($n = 14$) who correspond to Global Nomads.

24.4.2 Spatiotemporal Analysis

Figure 24.1 shows all the routes traced in the most central parishes of the municipality of Porto. Backpacker movements reveal a distribution of tourists through the main streets of the city, with a higher concentration in the most central areas, where the main attractions are located, namely in the parishes of Santo Ildefonso, Vitória, Sé, São Nicolau, Cedofeita, Miragaia and the parish of Santa Marinha in Vila Nova de Gaia.

Comparing the routes network with the main attractions of the city, there is a greater incidence of movements in the D. Luís bridge, the Sé do Porto, the Infante house, the Palácio da Bolsa, Ferreira Borges Market, São Bento Station, Bolhão Market, and the gardens of the Palácio de Cristal. Porto is known for its rich heritage, and therefore, its visit is based on the visit to monuments, as demonstrated by Espelt

and Benito [17]. The focus of tourist concentration is undoubtedly the Praça da Liberdade/Aliados where the Nice Way hostel is located, accommodation of many participants in this research (Figs. 24.1 and 24.2). The most distant parishes from the historic centre reveal a decrease in the tourist movements density, with the parishes located on the northern edge of the municipality having a reduced number of visits, or even none, as is the case of Aldoar. As it happened in Lisbon, in Caldeira's research [4], also in Porto seems to be a coincidence in the distribution of the network of routes "which becomes more open as we move away from the city centre to its periphery and from there to the metropolitan area" (p. 267).

In addition to the number of tourist attractions not being very relevant in areas further away from the historic centre of Porto, the public transport network, especially the Metro, does not guarantee the same accessibility to the whole city. As there is an interrelationship between the mode of transport and the spatial extent of tourists' visits [27], it is not difficult to explain a higher intensity of visits in areas served by metro stations. The urban layout of the classified area, with medieval characteristics, is marked by very narrow and irregular streets that lead tourists to two wider areas: the Praça da Liberdade/Aliados and Praça da Ribeira. When tourists have not explored the more winding streets of Sé, they follow Rua Mouzinho da Silveira or Rua das Flores, which are the main access routes between downtown and Ribeira. The high concentration of attractions in this area also leads to tourists travelling the same streets several times throughout the day, contributing to increased congestion. The concentration of movements/tours in the main streets is a trend in monumental cities [17]. These researchers also suggest that the edges or peripheral streets of historic centres and the connection nodes are logically related since the most frequent routes have origins in the main nodes [17], p. 57). Therefore, nodes and attractions located on these routes are more likely to be visited than those located off the main routes. It is therefore crucial, to ensure and facilitate sustainable mobility, that planning and territorial management measures are applied to contribute to the dispersion of tourists. The provision of an efficient public transport system that serves the entire municipality of Porto with the same level of accessibility could contribute to a greater dispersion of the accommodation offer and the location of new attractions or relocation of some existing ones.

Another aspect to consider when analysing the movements and routes taken by tourists (Figs. 24.1 and 24.2) is the emergence of possible conflicts with residents, since both locals and tourists share the same spaces. The morphology of the historic centre of Porto, marked by the existence of narrow streets with steep slopes, and the presence of Douro River, represent a morphological barrier making it difficult for tourists to disperse, favouring the existence of conditions for the emergence of overcrowded areas. This can result in more noise, more waste production and greater congestion of public transport.

Regarding the time spent in each parish by the tracked tourists (Fig. 24.3), it coincides with the distribution of the routes taken by them (Fig. 24.1). Zuzanek (1980) cited by Fennell [18 p. 815] defines time budget as "a method of measuring the duration and sequence of activities performed by an individual during a specific period of time, usually 24 h". In this research, the time budget corresponds to the time

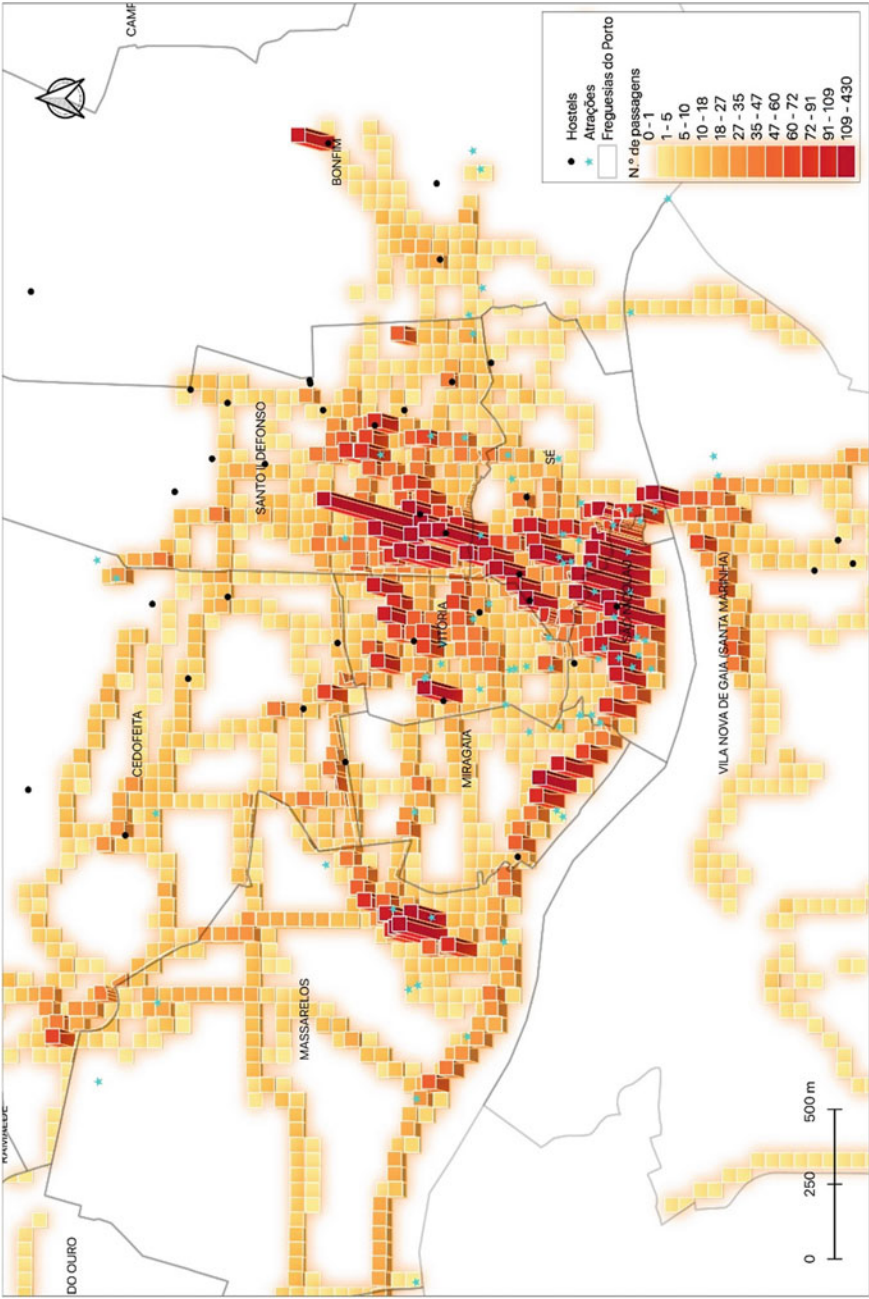


Fig. 24.2 Intensity of backpacker tourist movements—num. of passages per area in the World Heritage area of Porto [30]

that tourists have available to devote to their visit, and as it is not an unlimited resource, it must be well used. As the city of Porto, namely its historic centre where the largest concentration of attractions is located, has a relatively small area, it is not necessary to travel long distances to visit it. Therefore, walking is the most popular means of locomotion among those who visit the city, which is why local authorities responsible for managing tourism activity should be aware, as tourists come into direct contact with the life and cultural aspects of residents and influence the city's economy, culture and environment [52]. As most of the time budget dedicated to visiting the city is concentrated in a relatively small area (former parishes of Santo Ildefonso, Sé, São Nicolau and Vitória), characterised by its narrow streets and irregular orography, the increasing number of visitors will contribute to the overcrowding of these areas, contributing to the emergence of problems in terms of the quality of visits and possible conflicts between residents and tourists. It is therefore important to provide the city with infrastructures suited to the needs of those who visit it on foot and to promote an adequate distribution of visitors.

Figure 24.2 can be observed a higher incidence of movements in the parishes of the historic centre classified by UNESCO as a World Heritage Site, along Praça da Liberdade, Aliados, Rua Mouzinho da Silveira and Rua das Flores. These streets are an important circulation corridor to access the Ribeira do Porto, not forgetting the corridor connecting the Ribeira square, D. Luís bridge and the Cais de Gaia. The Sé Cathedral and the D. Luís bridge, together with the Cais de Gaia, also reveal a large number of backpacker passages. Other secondary host spots are the garden of the Palácio de Cristal, Rua de Cedofeita and Rua de Miguel Bombarda (art galleries) and the well-known Boavista roundabout where the emblematic Casa da Música is located.

The places where backpackers spent more time correspond, in general, to the places with the highest intensities of passages (Fig. 24.3): Aliados, Praça da Liberdade, Rua Mouzinho da Silveira, Rua das Flores and Ribeira do Porto. Occasionally, there are high lengths of stay in some places close to some attractions and accommodation. Among the attractions, the following stand out: Sé Cathedral, São Lázaro Garden, São Bento Station, D. Luís Bridge, Misericórdia do Porto Church, Clérigos Tower, the Gardens of Palácio de Cristal, Porto and Gaia riverside, Bom Sucesso Market and Casa da Música. Occasionally, there are small territories with average stay times of more than 31 min, scattered throughout the city and not coinciding with the location of attractions. These areas correspond mainly to places where cafés, restaurants or hostels are located where breaks for meals, drinks, rest, among others, justify higher average stops. In addition, places close to some viewpoints, Casa da Música and the Gaia River also have higher averages (Fig. 24.3).

Most backpackers visiting Porto made stops of less than 5 min, in line with the results obtained by Yun et al. [52] where 98% of the stops made by the individuals lasted less than three minutes. Backpackers use the main city streets to move between attractions, revealing a low utilisation of their time budgets when visiting attractions, apart from Casa da Música. The city streets were thus used for circulation without significant stops or experiences [52].

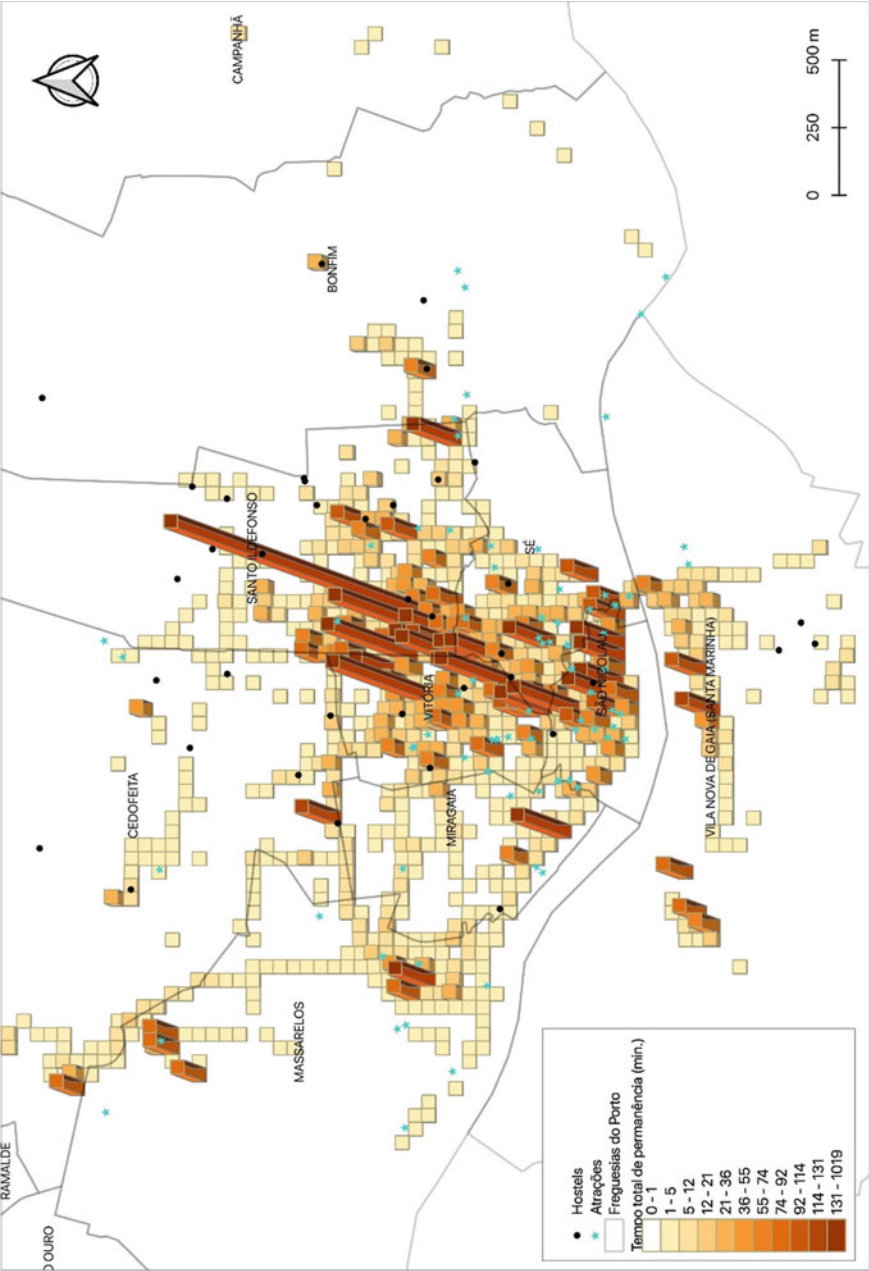


Fig. 24.3 Total length of stay of backpackers in the World Heritage area of Porto [30]

24.5 Conclusions

Literature reveal that backpackers appreciate different types of experiences during their visits, looking for cultural attractions and activities such as museums, artistic and monumental heritage, cultural activities associated with intangible heritage, such as music, gastronomy and wines, among others. This research shows that in an urban context backpackers have a preference for visit the main monuments located in the historic centre, using the main city streets to move between attractions. Backpackers have a low utilisation of their time budgets when visiting attractions, preferring to walk around. It is interesting to note that the longest average stay times do not coincide with the location of attractions. Backpackers spend more time in cafés, restaurants or close to hostels for meals, drinks or rest. In addition, places close to some viewpoints, the Casa da Música and the Cais de Gaia also have higher averages of length of stay.

This research can give important practical contributions do Porto Destination Management Organization (DMO). As walking is the most popular means of locomotion among those who visit the city, local authorities should pay special attention to the tourism impacts in the resident's day life and in the influence of tourists in the city's economy, culture and environment. As most of the time budget dedicated to visit the city is concentrated in a relatively small area (former parishes of Santo Ildefonso, Sé, São Nicolau and Vitória), characterised by its narrow streets and irregular orography, the increasing number of visitors will contribute to the overcrowding of these areas, and to the emergence of problems related with visitors' satisfaction and possible conflicts between residents and tourists. It is therefore important to provide the city with infrastructures suited to the needs of those who visit it on foot and to promote an adequate distribution of visitors.

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Chapter 25

Environmental Corporate Social Responsibility (ECSR) in a Price-Set Competition Between Private and State-Owned Hotels



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Abstract Environmental corporate social responsibility (ECSR) has emerged as a crucial concept in the business world, reflecting a growing recognition of the profound impact of corporate activities on the environment. We will study a model in which two hotels with different objectives must take decisions on environmental CSR policies and on room rates, considering the separation between ownership and management. We will discuss two cases: (i) the SO hotel takes the leader position; (ii) the FP hotel takes the leader position. The study was conducted using game theory techniques. The results allow us to conclude that by adopting environmental CSR, hotels are improving social welfare. In the case that SO hotel acts as a leader, we prove that both hotels adopt environmental CSR, whereas in the case of FP hotel acting as a leader, only the SO hotel (follower) adopts environmental CSR. In both cases, environmental CSR improves social welfare.

25.1 Introduction

Corporate social responsibility (CSR) can make a significant contribution to a responsible and sustainable development of tourism. According to the definition of the European Commission, CSR is “a concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with their stakeholders on a voluntary basis”. We point out that CSR measures are voluntary and should therefore exceed legal regulations.

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Environmental corporate social responsibility (ECSR) encompasses the ethical and voluntary initiatives undertaken by corporations to address their environmental impacts and contribute positively to sustainability. It involves the integration of eco-friendly practices and strategies into core business operations, with a focus on reducing greenhouse gas emissions, conserving natural resources, and mitigating environmental risks. As consumers, investors, and stakeholders demand greater accountability from companies, ECSR has become a vital aspect of a firm's reputation and competitiveness.

A culture of corporate social responsibility (CSR) involves actively contributing to the well-being of the community. This is achieved by conducting business in a manner that generates shared value for society through ethical practices, as highlighted by studies such as those by Latapí Agudelo et al. [1] and by Sharma [2]. This can be accomplished through particular steps that prioritize social responsibility [3]. Enacting corporate social responsibility (CSR) initiatives opens the door to attaining sustainability, generating value, and gaining a competitive edge [4, 5]. Furthermore, it serves as a potent instrument for shaping societal perspectives, enhancing quality of life, influencing public perception of a brand, and functioning as a robust marketing tool [2]. This is especially pronounced within the hospitality sector, where a spectrum of stakeholders hold the belief that this industry bears a responsibility to yield benefits due to its financial successes [6]. Hence, hospitality enterprises are progressively dedicating resources to corporate social responsibility (CSR) endeavours, with the dual objective of cultivating robust stakeholder connections and enhancing their operational outcomes [7, 8].

CSR was first implemented in the tourism sector in the late 1990s by international hotel corporations. The literature on CSR has grown appreciably in recent years [9]. Kaur et al. [10] analysed the literature published on the role of CSR in the restaurant sector from 2004 to 2021. Many international hotel chains have integrated CSR measures, such as Marriott International with the program "Spirit to Serve Our Communities" or NH Hotels' "Street Children". Today, many hotel chains publish annual CSR reports on their websites (e.g. Accor, Hilton Hotel Corporation, Inter-Continental Hotels, NH Hotels, Club Méditerranée, etc.), as mentioned in [11].

Notably pivotal for the industry's competitiveness, CSR has already demonstrated favourable impacts on corporate standing, fostering brand favouritism, and elevating customer confidence and affiliation with the organization [12, 13]. Companies engaged in corporate social responsibility (CSR) initiatives are acknowledged for receiving support from customers, both directly and indirectly, as evidenced by their perceived service quality [14]. Nonetheless, the domain of CSR in the hospitality sector remains inadequately explored, presenting substantial potential for expansion and advancement [12, 15]. As elucidated by Xu et al. [16], the expenses associated with integrating sustainable practices and policies within companies have the potential to erode their dedication to sustainability. Qian et al. [15] have affirmed that the commitment of high- and mid-tier hotels to CSR practices led to their greater engagement with this philosophy, in contrast to low-tier or budget hotels. According to Gutierrez-Martinez and Duhamel's study [17], the integration of sustainability practices within the hospitality industry hinges on leaders' capacity to design sys-

tems, foster dedication, and synchronize interests and objectives in harmony with sustainability principles.

The implementation of the “3Rs” (reduce, reuse, and recycle) within the environmental strategy holds a significant position within companies operating in the hospitality sector. This has been highlighted by researchers such as Chen and Peng [18] as well as Ioannidis et al. [19]. Embracing these principles can offer notable advantages to their overall performance and achievements. In relation to measuring sustainable performance metrics within the hospitality sector, Franzoni et al. [20] focus on the environmental aspects. They highlight the following indicators: Carbon dioxide (CO₂) emissions; energy consumption per guest night; renewable energy generation; water consumption; plastic usage; environmental certification; and use of certified eco-friendly cleaning products. Implementation of environmentally conscious corporate social responsibility (CSR) initiatives has a direct impact on the dedication and regard towards the tourism sector, as indicated by studies by Bogan and Dedeoglu [21] and Han et al. [22]. In essence, these initiatives contribute to the advancement of corporate sustainability, nurturing the holistic welfare of the society in terms of social, economic, and environmental dimensions, both presently and in the prospect. This, in turn, facilitates the progression towards more enduring communities and enhanced well-being, aligning with the concept of sustainable living [23].

As Lewis [24] highlighted, in the realm of hospitality, corporate social responsibility (CSR) assumes significance by motivating organizations to contribute positively to society. This not only yields favourable outcomes from a business perspective but also leads to advantageous results such as positive media coverage, enhanced publicity, and increased societal esteem. Corporate social responsibility (CSR) holds special significance in the hospitality sector due to its historical association with significant environmental effects stemming from factors such as energy and water usage, food wastage, and the utilization of disposable products, among others. Notably, the hotel industry by itself presently contributes to approximately 1% of the world's carbon emissions, with this contribution anticipated to rise in tandem with industry expansion.

Ferreira et al. [25] studied the effects of CSR on the strategic choice of pollution abatement and on the timing of the government's commitment to the environmental tax policy, in the hospitality industry (see also [26]). Hirose et al. [27] consider a model in which two firms choose whether to adopt environmental CSR policies and then face a sequential price-setting competition. In this paper, we apply the model described by Hirose et al. [27] to hospitality industry, and we consider one for-price hotel and one consumer-friendly one, instead of two private companies.

The remained of the paper is organized as follows. In Sect. 25.2, we describe the model. In Sect. 25.3, we study the case in which the SO hotel acts as the leader. In Sect. 25.4, we study the case in which the FP hotel acts as the leader. Conclusions are presented in Sect. 25.5.

25.2 Description of the Model

In this paper, we establish a market competition between one state-owned (SO) hotel H_1 and one for-profit (FP) hotel H_2 . The owners of the SO hotel aim to maximize social welfare, whereas the owners of the FP hotel aim to maximize its own profit. Furthermore, the owners of each hotel commit to donating a monetary amount for environmental improvements. However, each hotel has a manager who decides the room rates that maximize its net profit (the profit after subtracting the cost of donation).

The inverse demand function is linear, given by

$$p_i = 1 - q_i - \gamma q_j, \quad (25.1)$$

where q_i is the quantity (occupancy) of hotel H_i and p_i is the room rate, with $i = 1, 2$, $i \neq j$, and $\gamma \in (0, 1)$ is a measure of the degree of the differentiation of the hotels' rooms or services. The common marginal cost is constant and normalized to zero. Hotel H_i 's profit is given by

$$\pi_i p_i q_i. \quad (25.2)$$

Assumption 1 For simplicity, we assume $\gamma = 0.5$.

The owners of hotel H_1 's payoff is $\pi_1 = p_1 q_1$, the owners of hotel H_2 's payoff is social welfare (hotels' profits plus consumer surplus minus the loss from the externalities), and management's payoff is

$$V_i = \pi_i - \theta_i \beta q_i, \quad (25.3)$$

where βq_i is the level of pollution emitted by hotel H_i , and $\theta_i (\geq 0)$ is an internal emission price, representing the degree of environmental CSR and determined by the owners of hotel H_i .

Social welfare W is defined by

$$W = \pi_1 + \pi_2 + CS - \beta(q_1 + q_2), \quad (25.4)$$

where consumer surplus CS is given by

$$CS = \frac{2}{3} (p_1^2 - p_1 p_2 + p_2^2 + 1 - p_1 - p_2). \quad (25.5)$$

We will study and discuss two cases:

1. The SO hotel takes the leader position.
2. The FP hotel takes the leader position.

The proposed methodology consists in modelling the non-cooperative competition using game theory concepts. In each case, the model is a three-stage game.

In the first case, the game runs as follows:

- In the first stage, both hotels choose, simultaneously, the degree of ECSR.
- In the second stage, SO hotel sets its room rate.
- In the third stage, FP hotel selects its room rate.

In the second case, the game runs as follows:

- In the first stage, both hotels choose, simultaneously, the degree of ECSR.
- In the second stage, FP hotel sets its room rate.
- In the third stage, SO hotel selects its room rate.

For each model, we derive the explicit equilibrium values of degree of environmental CSR and room rates, and we also compute the corresponding hotels' profits and social welfare. We show that the second mover may earn higher profits than the first mover, which is different than the result obtained in (Hirose, et al., 2017). In the case that SO hotel acts as a leader, we prove that both hotels adopt environmental CSR, whereas in the case of FP hotel acting as a leader, only this leader hotel adopts environmental CSR. In both cases, environmental CSR improves social welfare.

Assumption 2 In order to have interior solutions, we assume $709/1950 < \beta < 2755/4888$.

25.3 SO Hotel Acts as the Leader

In this section, we analyse a marketing competition modelled by the following three-stage game:

- In the first stage, both hotels choose, simultaneously, the degree of ECSR.
- In the second stage, SO hotel sets its room rate.
- In the third stage, FP hotel selects its room rate.

Starting from the last stage, the FP hotel H_2 chooses the price p_2 that maximizes its objective function V_2 . By solving $\partial V_2 / \partial p_2 = 0$, we get

$$p_2 = \frac{1 + p_1 + 2\beta\theta_2}{4}. \quad (25.6)$$

In the second stage, SO hotel H_1 sets its room rate p_1 that maximizes V_1 . Putting (25.6) into V_1 defined by (25.3), and solving $\partial V_1 / \partial p_1 = 0$, we get

$$p_1 = \frac{5 + \beta(7\theta_1 + 2\theta_2)}{14}. \quad (25.7)$$

Putting (25.7) into (25.6), we get

$$p_2 = \frac{19 + \beta(7\theta_1 + 30\theta_2)}{56}. \quad (25.8)$$

Finally, in the first stage, both hotels choose, simultaneously, the degree of ECSR θ_1 and θ_2 that maximizes, respectively, W and π_2 . Putting (25.7) and (25.8) into (25.2) and (25.4), we obtain

$$\pi_1 = \frac{(5 + \beta(7\theta_1 + 2\theta_2))(5 - \beta(7\theta_1 - 2\theta_2))}{168}, \quad (25.9)$$

$$\pi_2 = \frac{(19 + \beta(7\theta_1 + 30\theta_2))(19 + \beta(7\theta_1 - 26\theta_2))}{2352}, \quad (25.10)$$

$$W = \frac{2755 - 2\beta(357\theta_1 + 354\theta_2 + 2044) - \beta^2 f(\theta_1, \theta_2)}{4704}, \quad (25.11)$$

where $f(\theta_1, \theta_2) = 637\theta_1^2 - 28\theta_1\theta_2 - 1960\theta_1 + 724\theta_2^2 - 2128\theta_2$.

By solving the system $\begin{cases} \frac{\partial W}{\partial \theta_1} = 0 \\ \frac{\partial \pi_2}{\partial \theta_2} = 0, \end{cases}$ we get the Nash equilibrium¹

$$\theta_1^I = \frac{1950\beta - 709}{1267\beta}, \quad \theta_2^I = \frac{5\beta + 7}{181\beta}, \quad p_1^I = \frac{5(28\beta + 3)}{181}, \quad p_2^I = \frac{15(5\beta + 7)}{362}.$$

The resulting profits are

$$\pi_1^I = \frac{5(3 + 28\beta)(407 - 485\beta)}{98283}, \quad \pi_2^I = \frac{65(7 + 5\beta)}{32761}.$$

So, we obtain the following result.

Proposition 1 *If the SO hotel assumes the role of the leader, then both hotels adopt ECSR.*

Furthermore, it is easy to see that

$$\pi_1^I - \pi_2^I \begin{cases} > 0, & \frac{709}{1950} < \beta < \frac{15}{41} \\ < 0, & \frac{15}{41} < \beta < \frac{407}{485} \end{cases}$$

So, we obtain the following result.

Proposition 2 *If the SO hotel assumes the role of the leader:*

- *For low levels of pollution emitted by the hotels, there exists a first-mover advantage.*
- *For high levels of pollution emitted by the hotels, there exists a second-mover advantage.*

¹ Throughout the paper, we use the notation superscript I to refer to the SO hotel leader case.

Thus, we can say that, in a situation where hotels are emitting only a small amount of pollution, being the first hotel to take certain actions or make specific changes can provide a competitive edge or benefit; in the context of hotels generating significant pollution, there is a strategic benefit for a business or entity that responds or acts later in addressing the pollution issue, rather than being the first one to do so.

Let's delve into the potential impacts on social welfare brought about by ECSR. From the results above, social welfare W^I is given by

$$W^I = \frac{65,485\beta^2 - 214,118\beta + 122,269}{196,566}.$$

Without ECSR, social welfare $W^{I,N}$ is given by

$$W^{I,N} = \frac{2755 - 4088\beta}{4704}.$$

We obtain $W^I - W^{I,N} > 0$, for all $\beta \in (709/1950, 2755/4888)$. This leads to the following proposition.

Proposition 3 *If the SO hotel assumes the role of the leader, ECSR improves social welfare.*

In the model considered, with the SO hotel assuming the role of the leader, when hotels actively engage in practices that prioritize environmental sustainability and take responsibility for their impact on the environment, they contribute to the well-being and betterment of society as a whole.

25.4 FP Hotel Acts as the Leader

In this section, we analyse a marketing competition modelled by the following three-stage game:

- In the first stage, both hotels choose, simultaneously, the degree of ECSR.
- In the second stage, FP hotel sets its room rate.
- In the third stage, SO hotel selects its room rate.

Starting from the last stage, the SO hotel H_1 chooses the price p_1 that maximizes its objective function V_1 . By solving $\partial V_1 / \partial p_1 = 0$, we get

$$p_1 = \frac{1 + p_2 + 2\beta\theta_1}{4}. \quad (25.12)$$

In the second stage, FP hotel H_2 sets its room rate p_2 that maximizes V_2 . Putting (25.12) into V_2 defined by (25.3), and solving $\partial V_2 / \partial p_2 = 0$, we get

$$p_2 = \frac{5 + \beta(2\theta_1 + 7\theta_2)}{14}. \quad (25.13)$$

Putting (25.13) into (25.12), we get

$$p_1 = \frac{19 + \beta(30\theta_1 + 7\theta_2)}{56}. \quad (25.14)$$

Finally, in the first stage, both hotels choose, simultaneously, the degree of ECSR θ_1 and θ_2 that maximizes, respectively, W and π_2 . Putting (25.7) and (25.8) into (25.2) and (25.4), we obtain

$$\pi_1 = \frac{(19 + \beta(30\theta_1 + 7\theta_2))(19 - \beta(26\theta_1 - 7\theta_2))}{2352}, \quad (25.15)$$

$$\pi_2 = \frac{(5 + \beta(2\theta_1 + 7\theta_2))(5 + \beta(2\theta_1 - 7\theta_2))}{168}, \quad (25.16)$$

$$W = \frac{2755 - 2\beta(354\theta_1 + 357\theta_2 + 2044) - \beta^2 g(\theta_1, \theta_2)}{4704}, \quad (25.17)$$

where $g(\theta_1, \theta_2) = 724\theta_1^2 - 28\theta_1\theta_2 - 2128\theta_1 + 637\theta_2^2 - 1960\theta_2$.

By solving the system $\begin{cases} \frac{\partial W}{\partial \theta_1} = 0 \\ \frac{\partial \pi_2}{\partial \theta_2} = 0, \end{cases}$ we get the Nash equilibrium²

$$\theta_1^{II} = \frac{532\beta - 177}{1267\beta}, \quad \theta_2^{II} = 0, \quad p_1^{II} = \frac{285\beta + 28}{362}, \quad p_2^{II} = \frac{2(19\beta + 26)}{181}.$$

The resulting profits are

$$\pi_1^{II} = \frac{(205 - 247\beta)(28 + 285\beta)}{98283}, \quad \pi_2^{II} = \frac{14(26 + 19\beta)}{98283}.$$

So, we obtain the following result.

Proposition 4 *If the FP hotel assumes the role of the leader, then only the SO hotel (follower) adopts ECSR.*

Furthermore, it is easy to see that

$$\pi_1^{II} - \pi_2^{II} \begin{cases} > 0, & \frac{709}{1950} < \beta < \frac{49}{361} \vee \frac{4}{1950} < \beta < \frac{2755}{4888} \\ < 0, & \frac{49}{361} < \beta < \frac{4}{11} \end{cases}$$

² Throughout the paper, we use the notation superscript II to refer to the FP hotel leader case.

So, we obtain the following result.

Proposition 5 *If the FP hotel assumes the role of the leader:*

- *For either low or high levels of pollution emitted by the hotels, there exists a second-mover advantage.*
- *For pollution levels neither too low nor too high, there exists a first-mover advantage.*

Thus, we can say that, in a situation where hotels are emitting either low or high amount of pollution, there is a strategic benefit for a business or entity that responds or acts later in addressing the pollution issue, rather than being the first one to do so; in the context of hotels generating neither too low nor too high amounts of pollution, being the first hotel to take certain actions or make specific changes can provide a competitive edge or benefit.

Let's delve into the potential impacts on social welfare brought about by ECSR. From the results above, social welfare W^{II} is given by

$$W^{II} = \frac{361\beta^2 - 1184\beta + 676}{1086}.$$

We obtain $W^{II} - W^N > 0$, for all $\beta \in (709/1950, 2755/4888)$. This leads to following proposition.

Proposition 6 *If the FP hotel assumes the role of the leader, ECSR improves social welfare.*

In the model considered, with the FP hotel assuming the role of the leader, and as was already the case in the previous section,nn when hotels actively engage in practices that prioritize environmental sustainability and take responsibility for their impact on the environment, they contribute to the well-being and betterment of society as a whole.

25.5 Conclusions

We examined a framework where both privately owned and state-owned hotels make decisions regarding the implementation of environmental corporate social responsibility. Subsequently, they engage in sequential competition within a context of price competition. We analysed two scenarios: (i) where the SO hotel assumes the leadership position, and (ii) where the FP hotel takes on the role of the leader. The findings enable us to deduce that hotels enhance social well-being through the implementation of ECSR practices. If the SO hotel assumes a leadership role, we demonstrated that both hotels embrace ECSR. However, if the FP hotel takes on the leadership role, only the SO hotel (as the follower) embraces ECSR. In both cases, ECSR improves social welfare.

For future work, it may be interesting to study the situation of a market composed of one SO hotel and several FP hotels.

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Chapter 26

Tourist Technology Satisfaction: Scale Development and Validation



José Mendes , Inês Boavida-Portugal , and Teresa Borges-Tiago

Abstract E-tourism has revolutionized the way people plan and experience travel, making it easier and more convenient to research and book trips, and enabling travelers to share their experiences and connect with others in new ways. There is rich literature concerning adopting and using information and communication technologies (ICTs), but the satisfaction achieved with these tools is still underexplored. In this sense, the present study aims to present the development/adaptation of a scale that evaluates subjective satisfaction of consuming with ICTs by responding to 5 items on a Likert-type scale. A survey was applied, and the Information and Communication Technology Satisfaction Scale (TTSS) was (re)created, with an adaptation of the items and the Life Satisfaction Scale. Participants included 598 individuals with an average age of 43.38 years, having taken at least two leisure trips in the last five years. The results reveal that most participants almost always used ICTs in their daily lives and said they had taken at least one trip during the SARS-CoV-2 period. They assured almost always use social networks during leisure trips and use dedicated APPs. The results revealed that the scale developed is psychometrically robust for assessing consumers' subjective satisfaction with ICTs, and there is no gender variance. Technology providers face significant challenges in the face of the constant innovation of technologies in tourism. The present instrument presents a practical contribution to assessing subjective consumer satisfaction, assisting in developing innovative technologies by portraying consumers' satisfaction with the ICT solution.

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26.1 Introduction

Information and communication technologies (ICTs) are a means of searching, storing, processing, and presenting information electronically [1], rapidly asserting themselves in the daily life of almost every individual and organization [2, 3]. Tourism and hospitality were no exception, and in the last two years, the growth path was increased due to the COVID-19 pandemic [4]. As a result, there is a plethora of information and communication technologies applications in tourism and hospitality that helps to automate and streamline processes [5], enhance the customer experience [6, 7], create new products and services [8], facilitate collaboration, and enable data-driven decision-making [9].

Although ICT is an essential tool for tourists in planning trips and enhancing local experiences, Roztocki and Weistroffer [10] noted that research on ICTs has focused primarily on their diffusion and implementation. Moreover, Molina-Collado et al. [4] highlighted that the relevance of technology in the tourism and hospitality field attracted many researchers but still left some key issues less explored and pinpointed customer satisfaction with the use of technologies as one of the existent gaps. This gap has been previously addressed in the work of Gretzel and Stankov [11] from the well-being perspective. Thus, after reviewing the most important works on ICT adoption by tourists, this paper addresses this gap and proposes a scale that identifies the critical factors that generate more tourist satisfaction when using ICT. This scale provides tourism and hospitality firms with a tool for evaluating their digital tools about “end-users” satisfaction, as well as guidance about which areas they must improve if wanting to increase tourists’ engagement and service experience.

26.2 Literature Review

E-tourism, also known as electronic tourism or digital tourism, refers to the use of information and communication technologies (ICTs) in the travel and tourism industry [12]. It encompasses the entire process of planning, booking, experiencing, and sharing travel experiences using digital platforms, such as websites, social media, mobile apps, and other online tools. E-tourism and the Internet support the interactivity between tourism enterprises and consumers, where e-tourism enables the improvement of internal processes and establishes efficient links through ICT innovations.

Thus, Kazandzhieva and Santana [13] presented in their study a complex conceptual framework for the e-tourism system and defined “e-tourism as a process of digitalization of all managerial and business functions, services, and stages of the value chain of the tourism system in order to increase the effectiveness in the interactions between tourism companies, consumers, and public sectors, thus achieving competitive sustainability.” This exponential growth of digital information in recent years has spurred the use of information technology in travel [3], but the adoption

of technology in tourism and hospitality is not new [14]. Nonetheless, organizations and tourist destinations have changed dramatically due to the digital revolution [15]. ICTs influence all tourism-related stakeholders leading them toward new opportunities and challenges [12], enabling both the expansion of products and services and easy access to information about tourist destinations for the consumer [16, 17]. Lee et al. [18] mention that ICTs have transformed the travel and leisure industry worldwide, influencing tourism asymmetrically.

E-tourism has revolutionized the travel industry by making it easier and more convenient for travelers to plan and book their trips online, from anywhere in the world [19, 20]. It allows travelers to research destinations, compare prices and services, book flights, accommodation, and other travel-related services, and share their travel experiences with others through social media and online review platforms [21]. Roztocki and Weistroffer [10] concluded that technology had a profound impact on the tourism industry and that tourism businesses need to embrace technology and collaborate with technology companies to remain competitive and meet the evolving needs of travelers. But the same authors highlighted that to pertain to this successful path it was essential to analyze not only the adoption processes but also the satisfaction with the technological tools adopted.

Several studies focus on assessment: satisfaction with ICTs as a work tool [22], satisfaction with work [23–26], satisfaction with information [27], satisfaction with life [28], satisfaction with the usefulness of ICTs [29, 30], and travel satisfaction [31]. On the other hand, other studies evaluate user satisfaction [32], tourists [33, 34], and customers [35–39]. Calvo-Porrà et al. [40] found that perceived control and skill level are important factors that drive satisfaction. But the authors also noted that the flow experience affects technology satisfaction in different contexts. A cross-reference is made in the different works to the tourism businesses' need to embrace technology and collaborate with technology companies to remain competitive and meet the evolving needs of travelers. Therefore, the trilogy tourism, technology, and satisfaction have become more relevant as a field of study, as inferred by the increasing references found (Fig. 26.1).

As noted in the previous figure, this trilogy only recently received attention. In this sense, to better understand the relationship between satisfaction and ICTs, we proceeded to a brief preliminary search in SCOPUS with the keywords “satisfaction” and “information and communication technology” identifying 1,286 articles. Through a bibliometric analysis using the VOSviewer program, we obtained Fig. 26.2.

The top image shows the map based on the co-occurrence of the data in the text, divided into three distinct clusters: consumer (red), industry (green), and technology (blue). Despite the differentiation between the clusters presented, they present a complex network of interconnections. This may be because tourism is considered an information-intensive sector, affecting the competitiveness of organizations and destinations, allowing efficient cooperation for globalization [41–43].

The bottom image presents a map of keyword co-occurrence (minimum 10), revealing that satisfaction has a link strength that is concentrated in the keywords trust, loyalty, and usability. Through this figure, we can also see that in recent years,

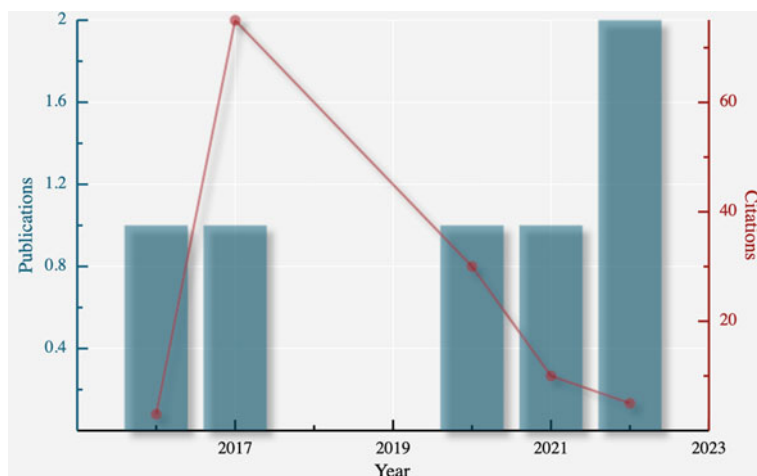


Fig. 26.1 Evolution of the number of publications and citations after 1970

publications have focused on digital systems, citizen satisfaction, COVID-19, e-health, motivation, and online learning.

This brief review has identified that most research has focused on the satisfaction that technologies can provide to the user. Borges-Tiago et al. [44] showed that smart technologies and ecosystems, value creation, shared economy, and tourism experience contribute to the rapid growth of smart tourism. Recently, Stankov and Gretzel [11] argued that digital wellness attracts more and more consumers. The search for well-being through tourism experiences has been the central goal of consumers [45], where intelligent tourist destinations can enhance the tourist experience by offering personalized products and services [46]. ICTs have been the subject of much research on these technologies' evaluation, influence, and impact on development and investment in economic activity and human development. However, no known instrument measures user satisfaction with the use of ICTs, used daily by billions of people around the world.

Most people express positive satisfaction with their work, and with the products and services they receive, among others [47–49]. Satisfaction is positively related to the experience of the meaning of life [48, 50, 51], that people who actively seek meaning in life have greater satisfaction, however, the relationships of meaning-seeking to experience and well-being are complex [50]. Studies by Gössling [52, 53] reveal that technologies and ICT innovation have made a strong contribution to human development. In fact, studies reveal that ICTs play an important role in tourists' behavior and expectations when planning and making a leisure trip, promoting the satisfaction of their tourist experiences [29, 54, 55]. From the perspective of Smith and Diekmann [56], hedonic and eudemonic well-being can be achieved through tourism experiences. On the other hand, digital well-being has increasingly attracted stakeholders in confronting technology-driven challenges, [11]. However,

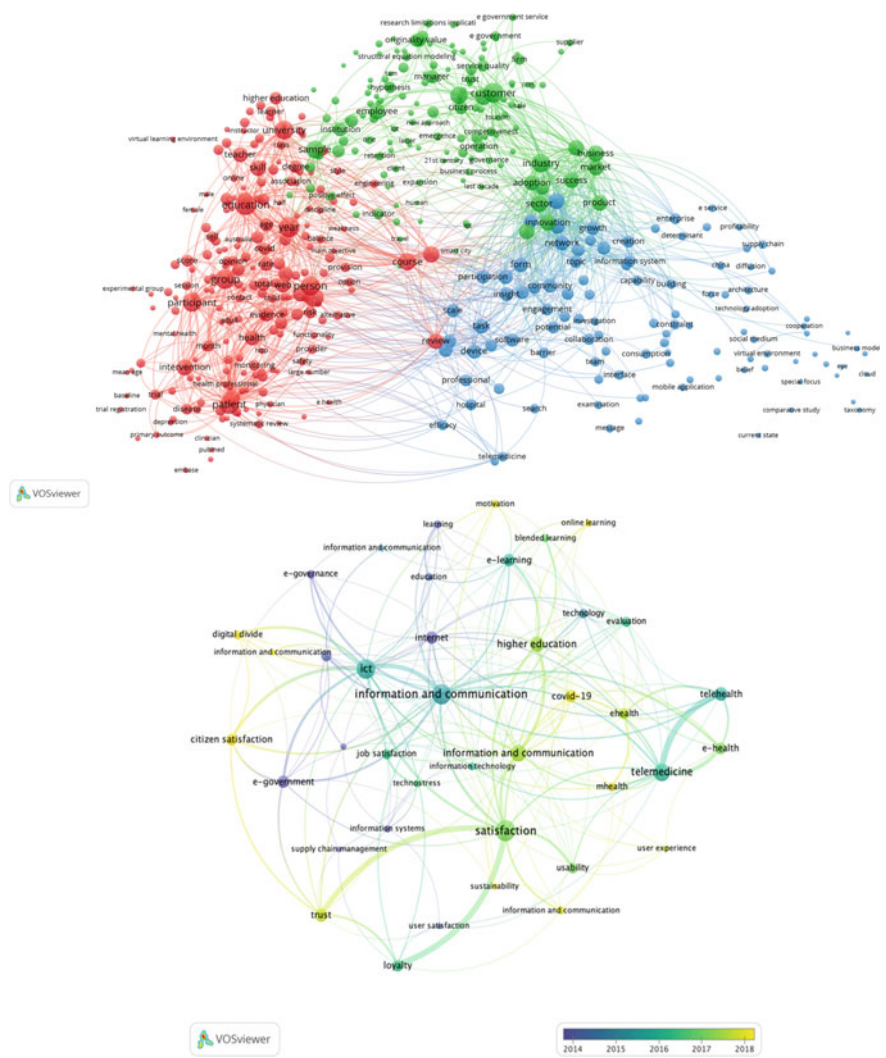


Fig. 26.2 Bibliometric analysis of keyword occurrence (network and overlay visualization)

sound conceptualizations of digital well-being and better development of innovative measurement approaches on how ICTs can be implemented to promote and measure well-being in the increasingly technological tourism activity are needed [45, 57, 58].

In this sense, the present study, instead of focusing on “what” satisfies the consumer the present study proposes the construction of a subjective evaluation instrument on feelings of satisfaction with ICTs, applied in a context whose objective is to evaluate the use of ICTs in the different stages of a leisure trip.

26.3 Methodology

This study aimed to create a tourist technology satisfaction scale (TTSS), which measures the psychometric characteristics of tourist satisfaction with technology when traveling. To accomplish this, the study followed a deductive scale development procedure, which is a well-established method in scale development research [59]. This approach has been widely used in previous scale development studies and is considered the standard for creating reliable tourism scales.

26.3.1 Procedures

A set of questions was constructed to assess subjective satisfaction with ICTs. The questionnaire was administered to 20 individuals of both sexes with different literacy levels to test the questions of the instrument. Afterward, the questionnaire was made available through the platform ArcGIS Survey123 (allowing only one submission per participant), disseminated through social networks, and made available by reading a QR Code in some tourist spots on the island of São Miguel (e.g., Gorreana Tea factory, considered one of the most visited tourist attractions), Lisbon, and Porto airport. The inclusion criteria for the present study were (i) age 18 years or older, (ii) having traveled at least twice in the past five years, and (iii) answering all the questions (questionnaire without skip questions).

26.3.2 Participants

In this study, 607 individuals responded, and nine responses were eliminated for not meeting one of the inclusion criteria. We validated 598 participants with a mean age of 43.38 years, in which 58% claim to be male, 42% claim to be female. The participants' academic qualifications are mostly concentrated in higher education (78.5%) and higher school (17.9%). Overall the participants under study perceive that their economic income allows them to live very well (17.7%); it is enough to live on (52%); it is less easy to live on their salary (23.9%); or it is very difficult to live on their salary (6.4%).

Most of the study participants are from Portugal (54.8%) followed by Spain (31.6%) and Brazil (4.2%). The UK, São Tomé and Príncipe, India, Switzerland, Poland, Germany, USA, Italy, Belgium, Czech Republic, and Chile are the countries with the lowest percentage.

26.3.3 Instruments

A sociodemographic questionnaire was designed to characterize the participants (e.g., age, gender, education level, number of trips made in the last five years) and exploration of the use of ICTs in a leisure trip (e.g., before, during, and after the trip).

Tourist Technology Satisfaction Scale (TTSS)—Taking into consideration the brief literature review in this article, the development of the TTSS was rationalized by taking into consideration the steps in the construction of a scale [59–61]. Five items of the Satisfaction with Life Scale were adapted/created, making them accessible to people of low cultural levels and reflected the general satisfaction with ICTs through five questions on a Likert scale with five response options (1 = Strongly disagree, 2 = Disagree, 3 = Don't disagree either agree, 4 = Agree, 5 = Strongly agree). Just like the Life Satisfaction Scale, the TTSS has a minimum score of five points and a maximum score of 25 points, indicating greater satisfaction with ICTs the higher the score.

Life Satisfaction Scale (SWLS)—Having developed the TTSS by adapting the items from the Life Satisfaction Scale developed by Diener et al. [62], it is important to apply this scale to establish correlations between both scales. The SWLS was adapted for the Portuguese population by Simões [63], and it is an instrument that measures overall life satisfaction through five items on a five-point Likert scale (1) strongly disagree to (5) strongly agree. In the present study, the SWLS scale presented a Cronbach's alpha considered good ($\alpha = 0.87$). The higher the score, the higher the life satisfaction.

26.3.4 Statistical Analysis

For descriptive statistics and exploratory factor analysis, we used the software IBM SPSS for macOS, version 28 (Armonk, NY, USA), descriptive statistics were analyzed and an exploratory factor analysis was performed and Cronbach's alpha was verified in order to assess the correlation between the items, thus gauging the measurement of the theoretical construct. Spearman's coefficient ($-1 \leq R_s \leq 1$) was calculated because the assumption of normality of the variable under study was not verified. IBM AMOS software for macOS version 28 (Armonk, NY, USA) was used for confirmatory factor analysis with maximum likelihood estimation, evaluating the global adjustment quality of the factor model by the Chi-square Test of Adjustment (X^2), considering $X^2/\text{g.l.}$ less than 5 as an acceptable model. According to the indices Comparative Fit Index (CFI), Goodness of Fit Index (GFI), and Root Mean Square Error of Approximation (RMSEA). A good fit was considered when the indices were close to the value of 1 and the RMSEA had reference values less than 0.05. Finally, invariance was assessed for the variables' gender and age class.

26.3.5 Supplementary Materials

The present study was submitted to the evaluation of the University of the Azores ethics committee and obtained a positive opinion with reference number 30/2022.

26.4 Results and Discussions

When the participants were asked about the use of ICTs, social networks, and dedicated Apps during the trip, through Fig. 26.3, it is possible to see that the participants consider the use of ICTs and social networks (e.g., Facebook) as essential for the trip. Dedicated Apps (e.g., Metro Lisbon) were considered by the participants as less relevant.

Asked about the number of trips made in the last five years, the participants said they had made an average of 8 trips ($SD = 7.32$), in which 66.9% of the participants claim to have traveled at least once during the SARS-CoV-2 pandemic. Considering the minimum value is five points and the maximum value of 25 points for TTSS and SWLS, participants showed satisfaction levels above the midpoint for both TTSS ($M = 18.93$, $SD = 3.49$) and SWLS ($M = 17.83$, $SD = 4.30$).

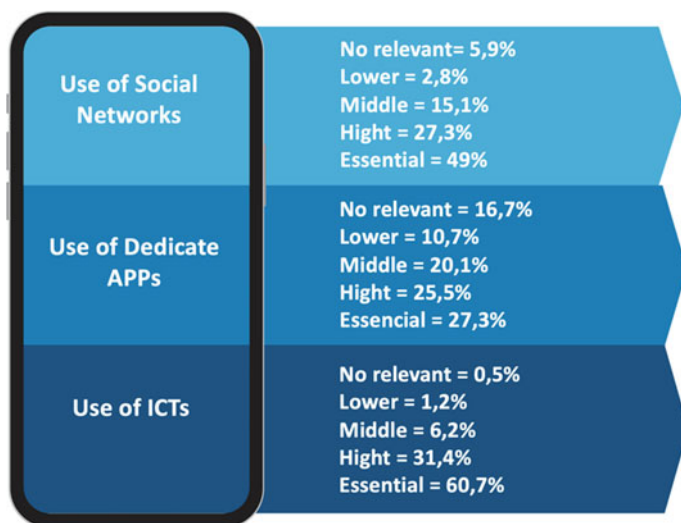


Fig. 26.3 Percentage of tourists' use of information technology

26.4.1 Reliability

A one-dimensional TTSS consisting of five items has a Cronbach's alpha considered acceptable ($\alpha = 0.80$); however, Marôco and Garcia-Marques [64] argue that the validity of this measure has been questioned, so they suggest composite reliability analysis.

26.4.1.1 Construct Reliability

After analyzing whether the internal consistency of the items is a consistent manifestation of the latent factor, we proceeded to calculate the composite reliability, with appropriate construct reliability ($\widehat{FC} = 0.81$) for this study. Marôco [65] states that in general construct reliability is considered appropriate when $\widehat{FC} \geq 0.7$.

26.4.2 Exploratory Factor Analysis

In the principal components analysis, with Varimax rotation, the Kaiser–Meyer–Olkin measure revealed homogeneity of the variables ($KMO = 0.82$) proving to be adequate for the sample. Bartlett's test of sphericity ($X^2(10) = 1,111,108$; $p < 0.001$) allowed us to verify that the variables are sufficiently correlated among the items. All items show strong correlations ($0.5 \leq |r| < 0.75$) to very strong $|r| > 0.75$ [66] (Table 26.1).

Table 26.1 Item-total correlations of the satisfaction with tourist technology satisfaction scale (TTSS)

Item description	Item-Total
1. The information and communication technologies almost give all the information I would have	0.78
2. The information and communication technologies are excellent	0.85
3. I am pleased with the information and communication technologies	0.86
4. So far, information and communication technologies have got a positive influence on my life	0.72
5. If I could remove the information and communication technologies, I wouldn't remove almost anything	0.62

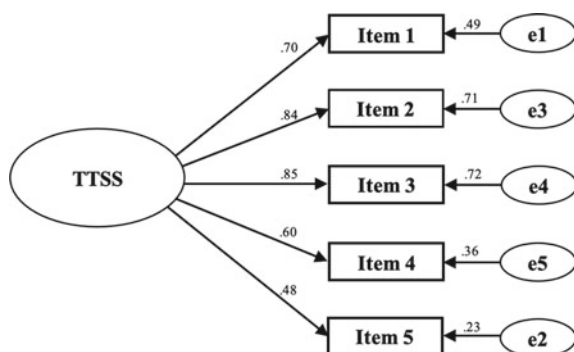
26.4.3 Confirmatory Factor Analysis

For the analysis of the adjustment quality index, Marôco (2021b) considers very good adjustment when Goodness of Fit Index (CFI), Comparative Fit Index (CFI) e Tucker-Lewis Index (TLI) present reference values ≥ 0.8 , indicating that values close to 1 are revealed as perfect models. This author also argues that Root Mean Square Error of Approximation (RMSEA) has a good fit when $[0.05; 0.08]$; $p \geq 0.05$. On the other hand, the lower the Standardized Root Mean Square Residual (SRMR) better fit, with $SRMR = 0$ indicating a perfect fit. In this sense, the one-dimensional structure of the TTSS model presents the quality of fit indices considered very good ($X^2(5) = 20,948$; $p < 0.05$, $X^2 df = 4,190$; CFI = 0.99; TLI = 0.97; IFI = 0.99; GFI = 0.99; RMSEA = 0.07, $p = 0.10$) and $SRMR = 0.031$. The weight of the regressions and variances of all items are significant ($p < 0.001$).

26.4.4 Invariance Measurement

Confirmatory factor analysis allows you to assess the invariance of an instrument's structure and parameters across groups. By this means, categorical variables were created to perform invariance tests for the sex variable (male–female) and the age class variable that according to Gonçalves [67] is subdivided into Teenagers (18–20 years old), Young Adults (20–40 years old), Middle-Aged (40–60 years old), and Elderly (more than 60 years old). We began the invariance test by fitting the confirmatory factor analysis model in each group, assuming that the model demonstrates adequate fit. We performed the tests for invariance considering the group ratings for equality of item factor loadings (metric invariance) and equality of item intercepts (scalar invariance) (Fig. 26.4).

Fig. 26.4 Confirmatory factor analysis of the TTSS model ($X^2(5) = 20,948$; $p < 0.05$, $X^2 df = 4,190$; CFI = 0.99; TLI = 0.97; IFI = 0.99; GFI = 0.99; RMSEA = 0.07, $p = 0.10$)



26.4.4.1 Gender Invariance Analysis

The configurational model adjusted for sex shows very good fit $X^2(10) = 30,962$; $p = 0.001$, CFI = 0.98, TLI = 0.96; RMSEA = 0.059, 90% CI [0.036, 0.081] and SRMR = 0.02. The fit is identical for the metric model $X^2(14) = 33,226$; $p = 0.03$, CFI = 0.98, TLI = 0.98; RMSEA = 0.027, 90% CI [0.027, 0.069] and SRMR = 0.03. Taking into consideration the commonly used criterion $\Delta CFI \leq 0.01$ [68], test results ΔX^2 and ΔCFI indicate a similar fit as a result of adding the equality constraints ($\Delta X^2 = 2304$, $\Delta CFI = 0.002$) concluding the existence of metric invariance. We then tested the scalar invariance in order to verify if the intercepts of the items are invariant between the groups, verifying that the results of the scalar model $X^2(18) = 45,907$; $p < 0.001$, CFI = 0.98, TLI = 0.97; RMSEA = 0.051, 90% CI [0.033, 0.070] and SRMR = 0.03, suggest scalar invariance ($\Delta X^2 = 12,641$; $\Delta CFI = 0.008$). Gender issues in ICT literacy have received attention over the years [69, 70] allowing gender differences to be overcome [71].

26.4.4.2 Age-Group Invariance Analysis

Analyzed the adjusted configurational model for the age group, there was also a very good fit $X^2(20) = 49,550$; $p < 0.001$, CFI = 0.97, TLI = 0.95; RMSEA = 0.05, 90% CI [0.033, 0.068] and SRMR = 0.07. The fit is identical for the metric model $X^2(32) = 67,344$; $p < 0.001$, CFI = 0.97, TLI = 0.96; RMSEA = 0.043, 90% CI [0.029, 0.058] and SRMR = 0.09. Taking into consideration the commonly used criterion $\Delta CFI \leq 0.01$ [68], test results ΔX^2 and ΔCFI indicate a less similar fit as a result of adding the equality constraints ($\Delta X^2 = 17,794$; $\Delta CFI = 0.005$) verifying that metric invariance is not sustainable.

We then tested the scalar invariance in order to verify if the intercepts of the items are invariant between the groups, verifying that the results of the scalar model $X^2(44) = 92,154$; $p < 0.001$, CFI = 0.96, TLI = 0.96; RMSEA = 0.043, 90% CI [0.031, 0.055] and SRMR = 0.09, suggest the assumption of non-invariance ($\Delta X^2 = 67,344$; $\Delta CFI = 0.012$). Chen [72] mentions the difficulty of proposing statistical standards to test the invariance measurement, suggesting that data should be interpreted with caution when non-invariance is found because the fit is influenced by several factors (e.g., sample size, model complexity). A study by Seguí et al. [32] reveals that ICTs are used differently according to age, revealing that computer and Internet use tends to be lower after the age of 50. However, these authors reveal that the acceptance of mobile devices is negligible between younger and older generations.

26.4.5 Correlation Analysis

When checking the intensity of the association between SWLS and the variables related to the use of technologies, low levels of intensity were found for the use of

technologies in daily life ($R_S = 0.16, p < 0.001$), the use of social networks ($R_S = 0.14, p < 0.001$), the use of dedicated apps ($R_S = 0.17, p < 0.001$), and the different Phases of the Trip ($R_S = 0.14, p < 0.001$). A study by Jun et al. [28] reveals that high smartphone use is significantly related to high levels of social support in families, subsequently promoting levels of life satisfaction, corroborating the results of this study. On the other hand, the existence of weak correlations between satisfaction with ICTs in the different phases of the trip does not corroborate the study of Ferrer-Rosell et al. [31] identifying a null or extremely weak relationship between these two variables.

On the other hand, results confirm moderate levels of intensity between TTSS and the variables use of dedicated apps ($R_S = 0.262, p < 0.001$), use of social networks ($R_S = 0.361, p < 0.001$), and use of ICTs ($R_S = 0.326, p < 0.001$). According to the brief literature review in this article, ICTs have been analyzed from the perspective of the satisfaction they can provide in various areas (e.g., work, personal, and professional daily life, among others) and the impact of ICTs on human development. Note that social networks are increasingly present in the daily lives of consumers to promote products/services [73] and promote purchase intention [74].

26.5 Conclusions

Tourism and technology are interdependent since the advances in technology have transformed the way people plan, book, and experience travel [6, 7]. The use of technology has become essential in the tourism industry, as it has enabled tourism businesses to improve efficiency, enhance the customer experience, and increase revenue [3]. Moreover, the use of technology in the tourism industry can impact customer satisfaction [31]. When technology is used effectively, it can enhance the customer experience and increase satisfaction. However, when technology is used poorly, it can have the opposite effect, leading to frustration and dissatisfaction. Although these ideas found support in the literature, there was a gap in what concerns its assessment. Thus, the present work attempts to develop a scale that assesses tourist satisfaction with the adoption of technology during traveling. Acknowledging scale development requires a rigorous and systematic approach to ensure that the resulting scale is valid and reliable and measures the intended construct accurately, following a deductive scale development procedure.

With all of these in mind, the results of the present study, aimed at investigating the psychometric properties of an instrument (re)created to assess satisfaction with ICTs, reveal adequate factor and confirmatory analysis. The ICTs applied to a sample of 307 individuals who have made at least two leisure trips, signal that the instrument assesses how satisfied individuals are with technologies overall. The importance of this instrument is evidenced not only by the emergence of e-tourism and intelligent tourism but also by the fact that so far no instrument evaluates the individual's satisfaction with information and communication technologies.

On the other hand, this instrument presents a practical contribution to the assessment of consumers in the face of the constant development of technologies, which are considered by various studies as a central point for digital well-being in tourist destinations, with a positive impact of ICTs on the development and economic growth of tourism activity [11, 45, 57, 58, 75, 76]. The ICTs are fundamental to increasing the effectiveness of organizations and access to information, especially in a constantly changing activity such as e-tourism. The present study allows us to better understand how satisfied users are with ICTs. On the other hand, the results, by presenting gender invariance, contribute to a better understanding of the “equality” in the use of ICTs in consumers’ daily lives.

26.6 Limitations and Future Research

The present study contributes to the tourism literature by introducing a tourist technology satisfaction scale (TTSS), that is, robust, reliable, and valid. Nonetheless, some limitations need to be addressed in future research. The participants in the present study are mostly of Portuguese nationality. Future studies should consider psychometric evaluation in other countries. Finally, it is necessary to conduct further research on the antecedents and consequences of technology satisfaction. Further studies could investigate the ICT satisfaction variable as a predictor, mediator, or outcome variable with other technology-related variables, such as barriers, image, usage, innovation, and others.

Declarations

Conflict of Interest The authors declare that there is no conflict of interest.

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Chapter 27

Dialogic Communication and Dialogic Loop Principle in Official Websites of Tourism—Hospitality



Adriana Oliveira and Ana Pereira 

Abstract The websites assumed a crucial role, both in the way in which the tourism sector began to spread the message, and in the way in which tourists began to choose their tourist destination, namely a hotel establishment. Dialogical communication allowed communication marked by interaction between organizations and publics. In this article, we seek to answer the question: what is the degree of adoption of the Dialogic Loop principle by Portuguese hotel websites? For this, the websites of the eight finalist hotels of the Marketeer 2023 Award were analysed based on the sixteen indicators that are part of the Dialogic Loop principle, considered the most important in the dialogic dimension. The results allow us to conclude that there is a trend towards the adoption of the Dialogical Loop principle, although it needs to be worked on so that the adoption takes place in a more expressive way.

27.1 Introduction

Tourism has assumed a fundamental role in the social, economic and cultural development of the country. Its affirmation strategy involved implementing a set of cohesive, integrated and constant communication strategies. This strategy gains breadth with the introduction of digital. Digital has given new forms and tools of communication to the tourism sector. Tourism began to be able to communicate in a more direct, constant, differentiated way. That is: it allowed disseminating an image marked by interaction and action with its audiences [1]. Tourists now have access to information about destinations or hotels even before starting the trip, allowing them to make a more careful selection; that is: digital communication would have a revolutionary

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role in the way tourists began to travel [2]. In this context, communication began to play a relevant role in the construction and dissemination of content to appeal to the interest of different stakeholders and communicate destinations, particularly in the context of tourism [3], where interaction between organization and public became important. In this line of thought, dialogic communication, proposed by Kent and Taylor [4], assumes itself as a master by allowing this direct exchange of ideas and opinions allowing effective interaction [4, 5]. Five dialogic principles were proposed, with the Dialogic Loop principle considered the most important [4]. In this sense, the article we present seeks to answer the following research question: what is the degree of adoption of the Dialogic Loop principle by Portuguese hotel websites? To answer the question, the Dialogic Loop principle was analysed in the eight finalist hotels of the 2023 Marketeer Award. The results show that there is a tendency to adopt a significant number of indicators that are part of the Dialogic Loop principle.

27.2 Background

27.2.1 *Contributions to the Contextualization of the Concept of Tourism*

Between the First and Second World Wars, tourism reached an exponent never seen before [6]. The rapid economic and industrial recovery of Western Europe at the end of the Second World War allowed an unprecedented growth in tourism activity. With the globalization of economies and culture, the improvement of means of transport and communication, it can almost be said that there are no longer places that do not receive tourists [7]. Thus, when trying to define the concept of tourism, the literature review suggests that, although it is not unanimous among authors, tourism can be understood as a set of trips that is based on the absence of the place of residence for a temporary period [8], tourism is understood as a social phenomenon of a voluntary and temporary nature of individuals or groups of people who for reasons such as health, culture, sport, leisure, leisure are predisposed to exchange their usual place of residence for another for a period of time. Depending on the different definitions of tourism, we conclude that in all of them there are two forms: emissive and receptive. It can be regional or national, internal or domestic tourism and international or foreign tourism. According to the tourist's motivations, tourism can be characterised as individual, couple or group tourism, and can be associated with a programmed, spontaneous or improvised itinerary [9]. In view of the various authors explored, it is possible to note the immense number of existing definitions of tourism, which highlight the diversity of approaches in which the concept is explored, either as a social practice or as an area of knowledge and study [10]. In this line of thought, it is also worth mentioning that tourism can be classified based on the tourist's objectives [11] and that body and soul tourism can be an example, where the experience is centred on the body and the health and well-being of the tourist. This is composed of health

tourism and active tourism. Or even a tourism marked by motivations from the intellectual, educational, material, business, environmental, social, ethnographic, rural or astronomical point of view [11]. That is, approaching the conceptual framework of the tourist sign allows us to perceive, among other particularities, knowledge, emotions, reactions, sharing of experiences [3] can be considered some of the purposes of tourism. As with the concept of tourism, the concept of tourist also refers to different typologies characterized by the activities that each tourist practices, thus defining the type of tourist. Thus, tourists can be categorized as Allocentric, Mesocentric or Psychocentric. Allocentrics seek new realities, perceive travelling as a fundamental component of life. Mesocentrics travel individually to highly visited and reputable places and have a more commercial relationship with the local population. Psychocentrics are influenced by external factors such as social communication and advertising campaigns, for example, sponsorships and advertisements of a tourist destination [10, 12]. Taking into account these concepts becomes more pertinent if we consider that the continuous development of new technologies, digital influencers are currently an important source of communication and drive the spread of information. Content creators gather large audiences composed of other individuals predisposed to consume their content and let themselves be influenced. As for social networks, they have played an important role in marketing strategies for the promotion of tourist destinations, namely in the importance that the opinion of certain content creators can exert on destinations, products and services. Therefore, this new aspect of tourism promotion forces destinations to adopt new strategies to improve image perception and influence the behavioural intentions of potential tourists. Thus, a digital revolution has taken place, resulting in a set of opportunities and challenges, particularly for the tourism sector [13], as can be read in the following section.

27.2.2 Dialogic Communication and Websites in the Tourism Sector

With digital taking on a leading role in the context of organizations, digital communication has gained a prominent place and started to include in its actions the different forms of communication, namely through the website, blogs, social networks, among others [14]. These changes have allowed the existence of multidirectional communication, with audiences directly interacting with the content and even being protagonists in the construction of verbal and non-verbal content that has been disseminated in the online context [14–16]. In this context, it can be said that communication has taken on a dual role: building and disseminating content to appeal to the interest of different stakeholders and communicating destination locations, particularly in the context of tourism [3]. It can thus be said that the digital context would open up the possibility for communication to take on a more social and participatory nature for all stakeholders [17]. This line of thought refers to the relevance of the association between the field of tourism and technology, showing that the aggregation between

the tourism sector and technology would bring about changes in the dynamics of communication, competitiveness, organization or even supply [18]. Thus, literature has shown that consumers can use websites or social networks as a field to exercise their communication, namely by sharing opinions, advice and experiences [19], and comments will allow greater interaction between different stakeholders [20–22]. This sharing can happen in different sectors, namely tourism, which is the central focus of this research. In this line of thought, dialogic communication, proposed by Kent and Taylor [4], is assumed as a master by allowing this direct exchange of ideas and opinions [4] allowing an effective interaction between organizations and their audiences [5]. The authors propose five dialogical principles, which are Dialogic Loop; usefulness of information; return visits; ease of interface; visitor retention. Among these dialogical principles, the authors refer to the Dialogical Loop as the most important principle of dialogical communication. The Dialogic Loop principle emphasizes the concept of feedback as a way to build a solid relationship and dialogue between the organization and its stakeholders. Therefore, websites should be designed and created to provide a set of tools that allow this interaction, namely Chat [23]; space for comments [4]; Forum [24]; sharing experiences of holidaymakers (texts) [25]; sharing experiences of holidaymakers (photos) [25]; possibility to send messages, comments [26]; links and contacts to directly contact employees, departments of the organization [27]; possibility to subscribe to newsletter [28]; possibility of transactions, requesting services [29]; links to social networks [30]; texts of response to the public [31, 32]; possibility to request information [33]; possibility for users to ask questions [26]; Questionnaire (to give opinion on issues) [26]; engaging and interactive online environment [23]; possibilities for community interaction [23]. That said, it can be said that the image of the organization can be better developed and disseminated using dialogic communication by allowing an image marked by interaction and action with its audiences [1], namely in the tourism sector where digital communication would have a revolutionary role in the way tourists started to travel [2].

27.3 Case Study Official Tourism Websites—Hospitality

27.3.1 Research Objective and Methodology

The literature review that digital has introduced opportunities, challenges and even transformations in the way tourists travel to organizations, namely in the tourism sector [13]. In this context, dialogic communication has played a vital role in establishing a direct dialogue between tourism organizations and stakeholders [4, 34]. Among the dialogic principles, the Dialogic Loop stands out as the most important of dialogic communication, being the focus of this research. Based on the literature review, it was considered pertinent to formulate the following research question: what is the degree of adoption of the Dialogic Loop principle by Portuguese hotel

Table 27.1 Official tourism websites—hospitality

Organizations	Websites
Dom Pedro Hotels & Golf Collection	https://www.dompedro.com/pt/
NAU Hotels & Resorts	https://www.nauhotels.com/pt/
Tivoli Hotels & Resorts	https://www.tivolihotels.com/pt
Vila Galé Hotéis	https://www.vilagale.com/pt
Pestana Hotel Group	https://www.pestana.com/pt
Quinta do Lago	https://www.quintadolago.com/pt/
The Editory Hotels (Sonae)	https://www.editoryhotels.com/
SANA Hotels	https://www.sanahotels.com/pt/

websites? To answer the question, the following specific objectives were formulated: analyse the degree of adoption of the sixteen indicators by the organizations' websites; identify which of the sixteen indicators is most adopted by the organizations' websites; identify which of the sixteen indicators is least adopted by the organizations' websites; identify which organization adopts the most indicators on its website; identify which organization has the least adoption of indicators on its website.

In this article, we highlight the results regarding the adoption of the Dialogic Loop principles on the websites of the finalist hotels of the Marketeer Awards 2023. Marketeer Awards is an initiative of Marketeer magazine and has been seeking, for 15 years, to recognize the brands, companies and personalities that make a difference in Portugal in different areas. We chose to analyse websites because they play a vital role in communicating with tourists and because they are understood to be an instrument that synthesizes the company's strategy effectively [35]. Thus, the sample consists of the official tourism websites—hospitality—see Table 27.1.

As already mentioned, we sought to study the adoption of the Dialogical Loop by testing sixteen indicators. These indicators are part of the Dialogic Loop, considered the most relevant dialogism in the context of dialogic communication. Table 27.2—can be read on the next page—shows each of these indicators and repeated references.

Data were analysed using descriptive statistics and frequency distribution, and the results are presented in the next section.

27.3.2 Results

At this point, the results regarding the degree of adoption of the Dialogical Loop principle [4] on the websites of Portuguese hotels finalists of the 2023 Marketeer Awards are presented and analysed. In general, the data shows that the websites of the hotels under analysis adopt the loop dialogue principle—see Table 27.3. Six of the eight hotels under study adopt the dialogic principle in a homogeneous way (63%). It should also be noted that only SANA Hotels, with 44%, do not show strong

Table 27.2 Dialogic loop—sixteen indicators

Dialogic loop	Indicators	Authors
	Chat	Hinson et al. (2018)
	Space for comments	Kent and Taylor (2003)
	Forum	Kent et al. (2001)
	Sharing experiences of holidaymakers (texts)	Augusto (2015)
	Sharing experiences of holidaymakers (photos)	Augusto (2015)
	Possibility to send messages, comments	McAllister-Spooner (2010)
	Links and contacts to directly contact employees, departments of the organization	McAllister-Spooner and Kent (2009)
	Possibility to subscribe to newsletter	Karkin and Janssen (2014)
	Possibility of transactions, requesting services	Feeney and Brown (2017)
	Links to social networks	Fietkiewicz et al. (2017)
	Texts of response to the public	Reber and Kim (2006)
	Possibility to request information	Ingenhoff and Koelling (2009)
	Possibility for users to ask questions	McAllister-Spooner (2010)
	Questionnaire (to give opinion on issues)	McAllister-Spooner (2010)
	Engaging and interactive online environment	Hinson et al. (2018)
	Possibilities for community interaction	Hinson et al. (2018)

Table 27.3 Frequency of indicators by Portuguese hotels

Portuguese hotels	Frequency of indicators	%
Dom Pedro Hotels & Golf Collection	10	63
NAU Hotels & Resorts	10	63
Tivoli Hotels & Resorts	10	63
Vila Galé Hotéis	11	69
Pestana Hotel Group	10	63
Quinta do Lago	10	63
The Editory Hotels (Sonae)	9	56
SANA Hotels	7	44

adoption of the dialogic principle (Dialogic Loop), followed by The Editory Hotels (Sonae) with 56%—see Table 27.3.

Thus, it can be said that the websites of the finalist hotels of the Marketeer Awards 2023, in general, show evidence of adopting the Dialogic Loop principle, which is

considered the most important in the context of dialogic communication [4]. By adopting this principle, the websites are enabling more direct communication with their stakeholders and thus responding more quickly to requests from the public who visit them digitally [5].

With regard to the adoption of the 16 indicators that form part of the Dialogic Loop principle—see Table 27.4, the data shows that of the 16, six are adopted by the eight websites of the finalist hotels of the Marketeer Awards 2023 (Dom Pedro Hotels & Golf Collection; NAU Hotels & Resorts; Tivoli Hotels & Resorts; Vila Galé Hotéis; Pestana Hotel Group; Quinta do Lago; The Editory Hotels (Sonae); SANA Hotels). And the six indicators adopted in their entirety are possibility to send messages, comments; links and contacts to directly contact employees, departments of the organization; possibility to subscribe to newsletter; possibility of transactions, requesting services; possibility for users to ask questions; engaging and interactive online environment—adopted 100% by all websites of the finalist hotels of the Marketeer Awards 2023—see Table 27.4.

On the other hand, of the 16 indicators, five are not adopted by the websites of the finalist hotels of the Marketeer Awards 2023 (Dom Pedro Hotels & Golf Collection; NAU Hotels & Resorts; Tivoli Hotels & Resorts; Vila Galé Hotéis; Pestana Hotel Group; Quinta do Lago; The Editory Hotels (Sonae); SANA Hotels). These indicators are space for comments; Forum; sharing experiences of holidaymakers (texts); sharing experiences of holidaymakers (photos); Questionnaire (to give opinion on

Table 27.4 Indicators used

Sixteen indicators	Frequency of indicators	%
Chat	7	88
Space for comments	0	0
Forum	0	0
Sharing experiences of holidaymakers (texts)	0	0
Sharing experiences of holidaymakers (photos)	0	0
Possibility to send messages, comments	8	100
Links and contacts to directly contact employees, departments of the organization	8	100
Possibility to subscribe to newsletter	8	100
Possibility of transactions, requesting services	8	100
Links to social networks	7	88
Texts of response to the public	7	88
Possibility to request information	7	88
Possibility for users to ask questions	8	100
Questionnaire (to give opinion on issues)	0	0
Engaging and interactive online environment	8	100
Possibilities for community interaction	1	13

issues)—see Table 27.4. It should also be noted that indicator possibilities for community interaction are only used by one of the websites under study (Vila Galé Hotéis). The other indicators that form part of the Dialogic Loop principle are adopted by seven of the eight websites under study: links to social networks; texts of response to the public; possibility to request information; chat. The analysis of the data allows us to affirm that, in general, the adoption of the indicators that are part of the Dialogic Loop principle is present on the websites. As this is one of the main dialogic principles, the data allows us to state that the results are in line with what was said in the literature review when it was stated that when this theme is adopted by organizations there is an improvement in the organization's image with the public [1], and to a certain extent communication between organizations and the different publics happens more directly and quickly, with greater interaction between the different stakeholders [20–22]. In the next section, we present the main conclusions.

27.4 Conclusion

Tourism is today a fundamental sector of society in general, and of Portugal in particular. The entry of digital in the field of tourism opened the possibility for the sector to communicate in a more autonomous and distinct way with the tourist and gave the tourist new ways of travelling [13, 14]. Dialogical communication plays an even more relevant role here [4], as it allowed for effective interaction between organizations and their audiences [5]. Among the five dialogic principles, the dialogic loop puts emphasis on feedback has been defined as the most important principle of dialogic communication the dialogic loop [4]. Based on this scenario, this work formulated the following research question: what is the degree of adoption of the Dialogic Loop principle by Portuguese hotel websites? To answer the question, the Dialogical Loop principle was analysed in the eight finalist hotels of the 2023 Marketeer Awards. The analysis of the data allows us to conclude that in general there is a strong tendency to adopt one of the dialogical principles and pillar of this study: the Dialogical Loop. Of the sixteen indicators that form part of the Dialogic Loop, ten are adopted by the eight websites of the finalist hotels of the Marketeer Awards 2023. There is therefore a tendency for the Dialogic Loop to be adopted by websites. However, the data also allows us to conclude that websites still have work to do in this field if they want to communicate with their audiences more effectively, because 5 of the indicators do not show any kind of adoption on websites of the finalist hotels of the Marketeer Awards 2023 and thus compromise the full realization of dialogic communication. Let's remember that, in analysis, this is the main dialogic principle: Dialogic Loop. We recognize that the sample is small enough to draw representative conclusions, but we would like to stress that this work is only a contribution to future work that we believe will be pertinent in a context marked by strong adherence to digital by the public. Therefore, we believe it is pertinent to continue this line of research and draw conclusions that are representative of the topic under study, both in Portugal and at an international level.

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Chapter 28

A Fuzzy ELECTRE Method to Model the Risk in Credit Products for Financing Tourism Experiences



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Abstract After the COVID-19 pandemic, the world began to value sensations and emotions much more, and it has been the tourism sector that has become one of the primary generators of sensory and emotional experiences in different tourist destinations worldwide. In this sense, people began to demand new credit products to finance tourism experiences; however, the international standards for credit risk management (IFRS-9) are still adjusting their regulations to these new market segments. In the scientific literature, we can observe a series of development trends aimed at modelling credit risk management at an international level for non-traditional credit segments, integrating machine learning concepts, which suggests a challenge for financial organisations worldwide. In this article, a Fuzzy ELECTRE model is proposed for the characterisation of portfolio provisions associated with credit risk for financial products aimed at tourism, integrating in a single structure a series of variables that describe the behaviour of the economy at the origin of travellers (macroeconomic variables), as well as a series of variables associated with consumer confidence when visiting a tourist destination. The proposed model made it possible to establish a general methodology for the creation of risk scenarios for portfolio provisions in financial products aimed at tourism, based on the characterisation of

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the variables described above as linguistic variables by integrating the criteria of experts from both the financial sector and the tourism sector, thus aligning the portfolio provisioning factors established by international IFRS-9 standards with the particularities of the tourism sector, without affecting the capital requirements of financial institutions.

28.1 Introduction

The impacts brought about by the COVID-19 pandemic at the global level made people value sensations and emotions much more. In this sense, one of the sectors of the economy that has positioned itself as one of the biggest generators of sensory and emotional experiences worldwide has been the tourism sector. This is why many travellers worldwide are beginning to demand credit services and products to finance their tourism experiences. Despite the development of international standards for credit risk management (IFRS-9), these standards are still in the process of developing new methods and models for risk management to suit the particularities of the tourism sector, which poses a challenge for financial institutions worldwide [35, 38].

After the global financial crisis of 2008, accounting researchers and regulators started to be concerned that the Incurred Credit Losses (ICL) model was partially responsible for increasing the severity of the economic crisis because it did not recognise at the appropriate time and resources the incurred losses in banks. Therefore, G20 leaders made a requirement to modify the International Accounting Standards using more information available, introducing a new forward-looking principle-based Expected Credit Loss Model (ECL model) [12]. With the ECL model, the International Accounting Standards Board (IASB) in 2014 issued the complete version of *Financial Instruments* (IFRS-9) to replace the International Accounting Standard (IAS 39), which was effective after 1 January 2018. These rules establish the portfolio provisions that financial institutions must comply with to face a possible default (Probability Default—PD) of their loan portfolio.

With the development of new financial products for different segments of the economy, the IFRS-9 international standards have been incorporating models by adaptation and learning, allowing portfolio provisions to be adjusted to the market's needs. Much research has focused on using artificial intelligence and machine learning to predict the Probability Default (PD) in credit products. In their investigation, Moscato et al. [24] propose a model for evaluating social inclusion credits, using machine learning techniques to fill in the lack of credit experience of credit applicants and missing or uncertain information. This research shows that the combined use of different techniques can generate better performance in the behaviour of the credit portfolio. Another study that addresses the issue is the one proposed by Huang et al. [17], where using neural networks seeks to solve difficulties in the credit evaluation process of small and medium-sized companies in China in several economic sectors, including the tourism sector. Both studies showed complex implementations, which

need a larger quantity of information to achieve a better performance estimating losses for several economic sectors worldwide.

Another development trend focuses on using Bayesian models to connect aleatory market's variables with probabilistic models to support complex decisions. In this way, Masmoudi et al. [23] proposed a Bayesian model that combines several factors to calculate the Probability Default (PD) in a credit portfolio, finding that the economic and political environment can influence the deterioration of a portfolio (macroeconomic and consumer confidence variables). Habachi and Benbachir [16] proposed a model for banking and non-banking companies to simplify the PD calculation with a model based on linear discriminant analysis and expert judgments. However, macroeconomic variables are triggers to increase or reduce PD. This development trend shows how macroeconomic and consumer confidence (CC) variables can significantly affect a financial institution's loan portfolio, given market conditions.

For risk management in credit products destined to finance tourism at a global level, a series of variables stand out that are critical for forecasting provisions and the deterioration of the credit portfolio in general. For the particular case of tourism credit, the macroeconomic (MC) variables of risk management at the origin of the financial institutions from which the travellers originate stand out (*Gross Domestic Product (GDP)*, *Inflation*, *Real Interest rate*), as well as several variables associated with the destination of travellers (*Weather Risks*, *Exchange Rate*) [20].

28.1.1 *Macroeconomic Variables (MC)*

- *Gross Domestic Product (GDP)*. GDP shows trends in countries' economies and monetary measures of the market value of all final goods and services produced and sold in a specific time [7]. In the context of traditional credits, Festić et al. [11] showed in their work that growth in the GDP impacts the non-performing loans (NPLs) in Central and Eastern Europe, while Naili and Lahrichi [25] found how the GDP in emerging markets in the Middle East and North Africa impacted the NPLs.
- *Inflation*. Inflation is a general increase in the prices of goods and services in an economy [2]. For this reason, Conto López et al. [6], in their research on the Colombian market, found a direct impact of inflation in the NPLs. Khan et al. (2020) also included this variable in their study in Pakistan banks.
- *Real Interest rate*. The real interest rate is the lending interest adjusted for inflation as measured by the GDP deflator [36]. For the characterisation of this variable in the context of credit risk, Vipindrartin et al. [37] examined the NPLs of rural banks and macroeconomic factors in Indonesia, including the interest rate, while Obiora et al. [26] show how the banking sector in Sub-Saharan Africa found that an increasing real interest rate affected the risk of NPLs.

28.1.2 Consumer Confidence Variables (CC)

- *Weather and Political Risks.* Weather and political risks are related to globalisation, climate change, unemployment rate, and political instability. The variables constitute the consumer confidence variables (CC) against a tourist destination, and these variables determine the travel decision to visit a tourist destination and the attractiveness of a tourist destination based on safeguarding territory sustainability and climate change [3, 13].
- *Exchange rate.* The exchange rate is the price of one country's currency over another [27]. Using a novel panel data set across 75 countries, Beck et al. [4] found that the exchange rate effect in NPLs depends on the extent of foreign exchange lending to unhedged borrowers, which must be high in countries with pegged exchange rates. In Colombia, Ramirez and Ruiz [32] determined that the exchange rate (Colombian peso in US Dollar) is a variable with a significant effect on NPLs because it indirectly affects economic agents' indebtedness.

To contribute to the literature focusing on the inclusion of macroeconomic and confidence consumer variables (MCCC) in credit risk management based on expert criteria, we proposed a model inspired on a Fuzzy ELECTRE method to define additional provision safety factors in small and medium financial companies (SMFCs) issuing credit products for the financing of tourism experiences. The proposed model integrates several MCCC variables into a single structure based on expert judgments in finance and tourism in the Colombian market, setting up additional provisions (security provisions) according to macroeconomic conditions beyond the models proposed by the Financial Authority in Colombia (Superintendencia Financiera de Colombia).

The proposed model made it possible to establish a general methodology for the creation of risk scenarios for portfolio provisioning in credit products aimed at tourism based on the characterisation of the variables described above as linguistic variables, aligning the portfolio provisioning factors established by international IFRS-9 standards with the particularities of MCCC variables in the origin and destination of travellers, without affecting the capital requirements of a financial institution.

This paper is organised as follows. In Sect. 28.2, the case of study is described, ELECTRE model is explained, and the proposed model is described. Section 28.3 shows the analysis of the results, and Sect. 28.4 shows the conclusions and future research lines.

28.2 Methodology

Provisions definition usually represents one of the biggest challenges due to its impact on the financial balances in SMFCs versus risk hedging in credit products. In addition, countries face economic dynamics that increase the challenge for the SMFCs, which

may occur where the economic environment can directly or indirectly impact the credit portfolio. For credit products intended for tourism in SMFCs, we propose the following methodology.

28.2.1 Case Study

For the analysis and validation of the proposed model, monthly data were collected on MC variables (Gross Domestic Product (GDP), Inflation, Real Interest Rate), and CC variables (Weather and Political Risks, Unemployment Rate, and Exchange Rate (TRM)). These variables have a direct impact on the PD in credit products. The data was obtained from the Central Bank of the Republic of Colombia [1]. Each variable was organised in time series with a monthly frequency between September 2005 and April 2022. For GDP, annual information was selected between 1961 and 2021, including the monthly Consumer Confidence Index from Fedesarrollo between January 2018 and April 2002. Based on the MCCC variables, seven finance experts in banking and tourism were set up as decision-makers (DM) to describe several risk scenarios according to the behaviour of a specific market and the particularities that define an NPL.

MCCC variables were analysed for the Colombian market between 2001 and 2022 as a starting and ending point for trips, allowing us to understand the economic and tourism risk in the country, and some of them would be correlated or a response to monetary politics such as the interest rate which depends on the inflation rate. Other variables, like the Exchange Rate, would have independent behaviour, and others, like the Weather and Political Risks (Consumer Confidence), would have cyclical behaviour. It is important to note that the period in which the variables that make up the model were analysed (2001–2022) includes the impacts that the COVID-19 pandemic generated on the countries' economies [31].

28.2.2 Theory and Definitions

28.2.2.1 Provisions

According to IFRS-9, provision for a credit product is defined based on the expected credit losses (ECL). Provision can be described as follows [9]:

$$ECL = EAD * PD * LGD \quad (28.1)$$

where PD: Probability Default is an estimate of the likelihood of a default over a given time horizon (%); LGD: Loss Given Default is the amount that would be lost in the event of a default (monetary); and EAD: Exposure At Default is the expected outstanding balance of the receivable at the point of default (monetary).

Table 28.1 Provision safety percentages per risk scenario

Scenario	% provision
AA	0.003
A	0.050
BB	0.100
B	0.250
C	0.500

Accounting international standard allows an organisation to select two approaches to calculate credit risk provisions: simplified and general. Companies with simple finance components define the simplified approach according to IFRS-5, while the general approach is based on ECL, for which companies need to create internal models [22]. It is important to note that the general approach defines provisions in companies with high credit risk or countries with complex political and security environments [5].

28.2.2.2 Safety Provision Factors

The international standard for provisions calculation IFRS-9 stipulates that under certain MCCC circumstances, SMFCs must establish portfolio provisions to face possible non-payment by the clients of their loan portfolios, using PD as a basis for this. This regulation incorporates information about credit quality, including a series of variable MCCCs that allow them to project their losses caused by a significant surge in credit risk [18]. The standard establishes different portfolio provisions according to different risk scenarios (AA, A, BB, B, C) for an SMFC. Generally, the risk scenarios established by the IFRS-9 standard are based on the behaviour of CCAM variables for a given country or region (Table 28.1).

28.2.3 Fuzzy ELECTRE Method with K-means Clustering

To define the provision factors in credit products for tourism in SMFCs based on IFRS-9 standards, we propose a Fuzzy ELECTRE method with k-means clustering methods to estimate provision factors for tourism credit products based on expert judgement and the MFCC variables that describe the behaviour of a specific economy.

28.2.3.1 Fuzzy ELECTRE Method

The *Elimination and (et) choice translating algorithm (ELECTRE)* is a method that originated from Roy in the late 1960s [15]. This method is based on the study of outranking relations and uses concordance and discordance indexes to analyse the

outranking relations among the alternatives [30]. To integrate the criteria of financial and tourism experts to the proposed model, MCCC variables were modelled using a *k-means clustering* process [29]. The fuzzy sets for MCCC variables were represented by the symbol “ $\sim$ ” placed above each fuzzy set (FS), using triangular fuzzy numbers denoted such as (l, m, u) , where l is the smallest possible value, m is the most promising value, and u is the most significant possible value that describes a fuzzy event [34].

According to the structure of an ELECTRE method, this method assumes m alternatives (risk scenarios) and n decision criteria (MCCC variables) based on decision-makers (DM). Each m -alternative is evaluated based on n -criteria, using Table 28.1 [8] (Table 28.2).

After the above, it calculated the relative weight vector for each criterion, which will define the aggregated fuzzy importance weight (AFIW):

$$\widetilde{w}_j = (w_{j1}, w_{j2}, w_{j3}) \quad (28.2)$$

$$\widehat{w}_j = \left(\frac{l_j}{\sum_{j=1}^m l_j}, \frac{m_j}{\sum_{j=1}^m m_j}, \frac{u_j}{\sum_{j=1}^m u_j} \right) \quad (28.3)$$

where

$$j = 1, 2, \dots, n, k = 1, 2, \dots, m$$

After the estimation of the AFIW matrix, we proceed with the estimation of the decision matrix (X), which is denoted and defined:

$$X = \begin{bmatrix} x_{11} & x_{12} & \dots & x_{1,n} \\ x_{21} & x_{22} & \dots & x_{2,n} \\ \dots & \dots & \dots & \dots \\ x_{m,1} & x_{m,2} & \dots & x_{m,n} \end{bmatrix} \quad (28.4)$$

Then, the normalised decision matrix (Matrix R) is calculated using the following formula:

$$r_{ij} = \frac{x_{ij}}{\sqrt{\sum_{i=1}^m x_{ij}^2}} \quad (28.5)$$

$$r_{ij} = \begin{bmatrix} r_{11} & r_{12} & \dots & r_{1n} \\ r_{21} & r_{22} & \dots & r_{2n} \\ r_{m1} & r_{m2} & \dots & r_{mn} \end{bmatrix} \quad (28.6)$$

Thus, the AFIW and the Matrix R helped to construct the weighted normalised decision matrix (Matrix V):

$$\tilde{v}_{ij} = r_{ij}^* \tilde{w}_j \quad (28.7)$$

$$\widetilde{V}_p = [\widetilde{v}_{ij}]_{m \times n}$$

(28.8)

where p : limits of fuzzy numbers ($p = l, m, u$).

To evaluate the model’s behaviour, we used the concordance (C_{a_1,a_2}^p) and discordance indexes (D_{a_1,a_2}^p). The first one represents the degree of dominance of MCCC criteria with the five risk scenarios (Table 28.1), while the second one shows the discrepancy between a a_1 -MC condition and a a_2 – MC condition among these risk scenarios. El detalle del proceso puede ser encontrado en [8].

28.2.4 Materials and Methods

To analyse and validate the proposed model, the first step was the MCCC variables selection. These variables were selected according to a panel of seven (7) experts in finance and tourism and according to the risk associated with a credit product aimed at financing travellers’ tourism experiences. In the second stage, we proceeded with the clusterisation of MCCC variables using the *k-means* method.

The MCCC variables were obtained from official sources for the government banking sector [1] between 1965 and 2022, guaranteeing a minimum of 5% in the standard error considering the sample size. Subsequently, we proceed with a *k-means* clustering analysis, dividing the data into seven (7) non-overlapping groups and following five scenarios according to IFRS-9 standards (AA, A, BB, B, C). Each scenario was set up, combining the labels that describe each fuzzy macroeconomic variable. In this way, the best scenario was named by AA, while the worst scenario is defined by the C letter.

In the third stage, a series of structured interviews was carried out with seven (7) financial and tourism experts to determine each variable impact on NPLs. The interview tool had 24 questions, which were grouped into 6 chapters. In each chapter, one of the selected MCCs was evaluated in five (5) proposal risk scenarios, and the questions allowed seven possible answers, according to Table 28.2. In this same stage, we proceeded to characterise the answers of the decision-makers in a numerical way, using the fuzzy Saaty scale [33].

Table 28.2 1-9 fuzzy conversion scale

	l	m	u
Extremely good (EG)	7.2	9	10.8
Very good (VG)	5.6	7	8.4
Good (G)	4.0	5.0	6.0
Medium bad (MB)	2.4	3	3.6
Bad (B)	1.6	2.0	2.4
Very bad (VB)	1	1	1

After the quantitative configuration of each scenario, the fuzzy ELECTRE method was applied (Stage 4). First, the relative weight vector (w_{ij}) and the aggregated fuzzy importance weight matrix (AFIW) were calculated according to Eqs. (28.2) and (28.3). Then, the normalised decision (X) and the weighted normalised decision ($\tilde{V}$) matrixes were built with Eqs. (28.5) and (28.7). The weighted normalised decision matrixes allowed to evaluate the dominance of a hypothetical post-COVID-19 scenario (P_0) compared with the defined risk scenarios using the metrics described in Eqs. (28.8, 28.9, and 28.10). The P_0 Scenario shows the MCCC conditions for the Colombian economy after the COVID-19 pandemic (2021).

$$C(a_1, a_2) \geq \overline{C} \quad (28.9)$$

$$D(a_1, a_2) \geq \overline{D} \quad (28.10)$$

where $\overline{C}$: The averages of $C(a_1, a_2)$. $\overline{D}$: The averages of $D(a_1, a_2)$.

To evaluate model stability, we replaced the P_0 reference scenario for each defined risk scenario (AA, A, BB, B, and C). In this stage, we expect that AA scenario will dominate the other scenarios, A will dominate BB, B, and C scenarios, BB scenario will dominate B and C, B will dominate only C, and so on. Finally, we proceed to estimate the provision percentage for P_0 reference risk scenario aligned to IFRS-9 standards and the risk scenarios defined for this study.

28.3 Analysis of Results

With the bibliographical search, in the Stage 1, MCCC variables selected for this study were: GDP (C1), Inflation (C2), Real Interest Rate (C3), Consumer Confidence Index (C4), Unemployment Rate (C5), and Exchange Rate (C6) Festić et al. [11]; Beck et al. [4]; Ghosh [14]; Dimitrios et al. [10]; Khan et al. [19]; Koju et al. [21]; Ramirez and Ruiz [22]; López-Espinosa et al. [22]; Viphindartin et al. [37]; Naili and Lahrichi [25]; Obiora et al. [26]; OECD [28]. After that, we grouped the data into seven non-overlapping fuzzy groups with the data obtained from the Government Republic Bank of Colombia and the k-means clustering method. According to the data size for each MCCC variable, the standard error was below 5% (3.98%), showing the significance of the data used to build the proposed model (First Stage).

In the second stage, and after the clusterisation process, we interviewed the DMs, obtaining five (5) risk scenarios labelled AA, A, BB, B, and C based on IFRS-9 standards (Table 28.1). The results showed that each scenario was configured according to the intrinsic structure of MCCC variables and the characterisation made by the DMs for each labelled scenario. To evaluate the Fuzzy ELECTRE model at this stage, we included an additional scenario named (P_0), which describes a macroeconomic situation for a risk credit for a post-COVID-19 scenario (Table 28.2).

Table 28.3 Setting up—qualitative risk scenarios

	Criteria	WC	DM1	DM2	DM3	DM4	DM5	DM6	DM7
			1	1	2	1	1	2	1
P0	PIB (C1)	1	G	G	G	G	G	G	G
	Inflation (C2)	1	G	G	MB	G	G	MB	VG
	Unemployment (C3)	1	VG	G	G	G	G	VG	VG
	Consumer Confidence (C4)	1	G	G	VG	G	VG	VG	G
	Interest Rate (C5)	1	VG	G	VG	G	G	G	G
	Exchange Rate (C6)	1	VG	VG	VG	G	VG	VG	G
AA	C1	1	G	G	MB	VG	VG	VG	VG
	C2	1	VG	G	G	VG	VG	G	VG
	C3	1	VG	VG	VG	VG	G	VG	VG
	C4	1	VG	VG	VG	MB	VG	VG	VG
	C5	1	VG	VG	VG	VG	VG	VG	VG
	C6	1	VG	VG	VG	VG	G	VG	VG
BB	C1	1	G	G	G	G	G	G	G
	C2	1	G	G	MB	G	G	MB	VG
	C3	1	VG	G	G	G	G	VG	VG
	C4	1	G	G	VG	G	VG	VG	G
	C5	1	VG	G	VG	G	G	G	G
	C6	1	VG	VG	VG	G	VG	VG	G
C	C1	1	MB	MB	G	MB	MB	MB	MB
	C2	1	MB	G	MB	MB	G	MB	VG
	C3	1	MB	MB	MB	MB	MB	MB	G
	C4	1	G	G	VG	VG	G	VG	G
	C5	1	G	G	MB	MB	MB	MB	MB
	C6	1	G	G	VG	MB	VG	VG	G

Table 28.2 shows three benchmark risk scenarios (AA, BB, C) characterised by expert judgement according to the fuzzy sets defining each MCCC variable. The post-COVID-19 (P_o) risk scenario is highlighted, which shows a conservative risk scenario for granting credit products requested by travellers in Colombia. This risk scenario has a similar behaviour to the BB risk scenario, which will also allow validation of the behaviour of the proposed model concerning the concordance and discrepancy matrixes that make up the proposed model.

Table 28.3 shows the *weighted normalised decision matrix* (V_1) (Table 28.3), as well as its concordance matrix (Table 28.4) and the associated discrepancy matrix (Table 28.5), which were obtained using Eqs. (28.8, 28.9, and 28.10).

In Table 28.4, the risk scenario post-COVID-19 (P_o) shows a clear dominance over the BB reference risk scenarios. ($C_{1,0,3}$), B ($C_{1,0,4}$), and C ($C_{1,0,5}$), as shown by the

Table 28.4 Weighted normalised decision matrix (*I*)

Matrix V1—weighted normalised decision matrix						
	C1	C2	C3	C4	C5	C6
P0	0.0576959	0.04987566	0.0662328	0.07990148	0.06757855	0.08677888
P1	0.06538869	0.06777975	0.07623021	0.08571249	0.08347938	0.08972053
P2	0.0576959	0.06777975	0.07623021	0.08571249	0.06757855	0.08677888
P3	0.0576959	0.04987566	0.0662328	0.07990148	0.06757855	0.08677888
P4	0.0576959	0.04476021	0.03624059	0.07990148	0.06757855	0.08677888
P5	0.03974607	0.04476021	0.03624059	0.07990148	0.04107716	0.07795391

Table 28.5 Decision matrixes **a** Concordance matrix **b** Discordance matrix

Concordance matrix (C1)							Discordance matrix (D1)						
	C1	C2	C3	C4	C5	C6		C1	C2	C3	C4	C5	C6
C1,0,1	0	0	0	0	0	0	D1,0,1	1	1	1	1	1	1
C1,0,2	1	0	0	0	1	1	D1,0,2	0	1	1	1	0	0
C1,0,3	1	1	1	1	1	1	D1,0,3	0	0	0	0	0	0
C1,0,4	1	1	1	1	1	1	D1,0,4	0	0	0	0	0	0
C1,0,5	1	1	1	1	1	1	D1,0,5	0	0	0	0	0	0

unit values taken for each criterion against the dominated scenarios, clearly show the stability of the model against the assessment of a risk scenario. This stability is also promoted by the discrepancy matrix, which clearly shows the discrepancy between the characteristics defining the post-COVID-19 (P_o) risk scenario, as shown by the unit values taken by each criterion against the AA ($D_{1,0,1}$) and A ($D_1, 0, 2$) scenarios.

According to Tables 28.3 and 28.4a and b in Fig. 28.1, it can be observed that the post-COVID-19 risk scenario (P_o) has a predominance by being located close to the BB and B risk scenarios, which also validates the structure of the proposed model against the fuzzy sets obtained from the clustering process based on the k-means method.

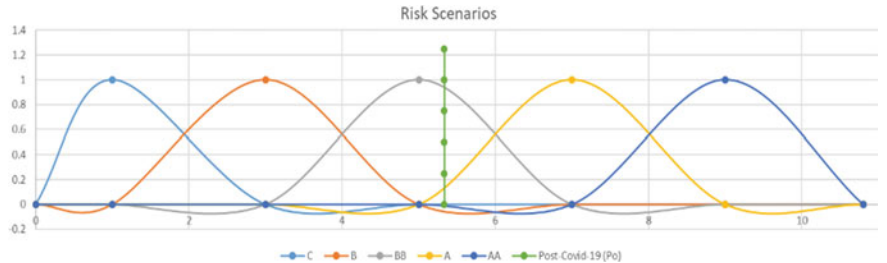


Fig. 28.1 Fuzzy sets—risk scenarios

Table 28.6 Provision percentages—risk scenarios

CDv	Average	Rating	Scenarios	Category
0	0	0	1	AA
1	10.926	10.925812	2	A
2	11.185	22.3703704	3	BB
2	10.667	21.3333333	4	B
2	9.926	19.8518519	5	C

Table 28.6 shows the values achieved by the proposed model against the classification of risk scenario P_o . Here, it can be seen in the first column (*CDv—concordance discordance Values*) that the dominated scenarios reached a value of 2, given the coincidence of the concordance and discrepancy matrixes for these scenarios. The average column shows the average of the criteria that are dominated by the P_o risk scenario according to the scale of values established by Saaty (Table 28.2). In this way, the product between the average and rating columns will allow to determine the risk scenarios among which the post-COVID-19 (P_o) scenario is located and will also allow the estimation of additional portfolio provisions for this scenario.

According to Tables 28.5 and 28.6, the factor for the additional portfolio provision, or security portfolio provision (P_f), can be estimated as follows:

$$P_f = \frac{(0.100)*22.370 + (0.250)*21.333}{(22.370 + 21.333)} : P_f = 0.1732 \quad (28.11)$$

Equation (28.11) shows that, under an economic scenario such as the one described in the P_o , the portfolio provisions that banks that grant credit products to finance tourism experiences must have, in addition to the provisions established by the IFRS-9 standard, establish an additional provision of close to 17.32% for each of the loans granted for tourism in order to achieve a safety margin that allows them to operate under a particular risk scenario.

28.4 Conclusions and Future Work

The proposed model allowed the establishment of portfolio provisions and the portfolio provisions established by IFRS-9 for credit products intended to finance both the sensory and emotional experiences of travellers in different destinations worldwide. To this end, this model integrated into a single structure a series of MCCC variables as linguistic variables, which integrated qualitative information from experts from both the financial and tourism sectors and which reflect in one way or another the behaviour of the economy of the travellers' place of origin and destination.

In the context of the IFRS-9 international standards that define the provisions for the credit portfolios of a financial institution, the model established a series of

additional provisions or security provisions in addition to those established by the standard, given the particularities of these new credit products aimed at the tourism sector. Likewise, through the discrepancy and concordance matrixes, it was possible to validate the sensitivity of the model in the estimation of these security provisions, taking into account different risk configurations for the reference risk scenario P_o .

As future work, the researchers propose to integrate a learning model that allows the model to configure itself automatically, including MCC variables that impact different markets in an international context, internal politics about their credit portfolios and clients' characteristics, differentiated values reflecting the importance of the assessment criteria, differentiated values reflecting the expertise of the experts, as well as APIs to access to public information in the web. In this sense, the proposed model can be used by legal authorities to adjust and promote temporary regulations according to economic conditions, looking for suitable coverage tools in the presence of an increase of NPLs.

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Chapter 29

How Wine Information Seeking and Event Participation Impact Knowledge and Determines the Purchasing Behavior?



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Abstract How knowledge impacts purchasing behavior is a matter of extensive investigation, but the research on the interplay between the self-reported wine knowledge and information seeking is scarce. Present research contributes to filling the gap within the understanding how self-reported wine knowledge and information seeking impacts wine purchase behavior. Based on the analysis of 1314 valid questionnaires administered to the participant of wine event “Essência do Vinho” held in Porto, Portugal between 23 and 26 of February 2023, partial least squares (PLS) path analytical technique was employed. We confirm that more knowledgeable consumers are less price sensitive and rely more on their knowledge and subsequent appreciation of place of origin of the wine at the moment of purchase. Meanwhile limited wine knowledge is a constraint in wine consumption, as it makes consumers more insecure in making their own choices and relying more on value for money appreciation, price and recommendation factors. We conclude that stimulation of information seeking and participation in the wine events is key in increasing wine expertise that impacts appreciation of the place of origin and subsequent willingness to pay. Thus, promoting

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awareness and expertise among consumers is the key to increasing competitiveness of the wine sector.

29.1 Introduction

Wine's socioeconomic importance is well-known. There has been a campaign in Portugal in the 30 s of the last century—"Drinking wine is giving bread to a million Portuguese" reflecting the importance that the wine sector has for the national economy. In addition to its economic role, wine is also a culturally emblematic agricultural product, rooted in history and in eno-gastronomic customs and traditions [1, 22]. More recently, wine, vineyards and production itself have also found a new dimension of importance in tourism. The development of wine tourism had a growing expression in the various wine regions of the country, attracting more and more tourists looking to learn about the wines, landscapes and traditions and people.

According to data from the Institute of Vine and Wine [19], national wine production yielded to the 14 wine regions of Portugal, in the 2021–22 harvest, a total of 7.4 million hectoliters (a growth of 14% compared to the previous year). Only five of these regions: Douro, Lisbon, Alentejo, Minho and the Tagus, represent 80% of the total production [18]. These figures make Portugal one of the main wine producers (10th place in the world ranking) and one of the largest exporters—3.2 million hectoliters, representing a value of 941.5 million euros [18, 19]. Although the weight of exports is very significant (43% of production), domestic consumption is on the rise accompanying tourism activities increase.

Since the late 1990s, wine tourism has grown in popularity [1]. It is one of the most significant marketing opportunities for wine growers and the tourism sector [31]. Within this context, studying consumer behavior is crucial since it may make a substantial contribution to the creation of a successful strategy [27].

How knowledge impacts purchasing behavior is a matter of extensive investigation [1, 5, 7, 8, 10, 29, 30, 34]. However, the research on the interplay between the self-reported wine knowledge and information seeking is scarce [10]. Some more specific questions still remain unanswered. Namely, how the wine knowledge and expertise is formed—does wine information seeking and wine event participation impact positively the self-accessed expertise evaluation and subsequent purchasing behavior? Thus, with present research we aim to fill this gap and analyze the influence of wine info searching and wine event participation on self-reported expertise and its subsequent impact on factors of purchase behavior.

We address a very specific public of the Essence of Wine (Essência do Vinho)—the most prestigious wine event in Portugal and takes place every year in the city of Porto since 2004, more specifically, at the Palácio da Bolsa. It brings together national and international producers, professionals from the wine sector and the general public who come to the event for a variety of reasons, from curiosity to business [9].

Dedicated to wine tourism, the program has dozens of activities, and the event is designed to offer a unique experience to all participants [9]. It is unrivaled opportunity

to discover some of the best Portuguese wines and explore the richness and diversity of its wine regions, and Essência do Vinho is a must for any wine enthusiast and just curious visitors to increase their knowledge and interest in wine [9].

This year, 2023, from 23 to 26 February, the 19th edition of this unique event took place, and it brought the world's wine tourism industry to Portugal, combining it into a professional fair [33]. More than 3000 wines were tasted and represented by around 400 producers [9, 33]. Essência do Vinho is a multicultural event, where participants from different parts of the world coming together in the same space and generating an important economic and social impact in the city of Porto.

Thus, we address a very specific public that is drawn to the wine event, therefore making it possible to evaluate different levels of expertise, the role of wine seeking information and wine event participation in its formation and its subsequent outcomes in the form of wine purchasing behavior.

29.2 Wine Expertise and Purchase Behavior

Consumer knowledge impacts information search, information processing and decision-making regarding various products, wine inclusively [10]. And on the other hand, it is observed that limited wine knowledge represents an obstacle for wine consumption [1, 30]. Wine knowledge is positively reflected in wine spending and the frequency of wine consumption, as well as the practice of wine tourism [1, 11].

The promotion and positioning of an ultra-peripheral wine region benefits greatly from wine education and wine tourism [2]. Wine education influences consumers with low wine consumption rates and has a beneficial effect on a consumer's interest in wine [28]. Expertise leads to higher search activity [29, 30]. But does the higher search activity reflect in the self-reported expertise and subsequent purchase behavior based on the recognition of the country of origin and region?

Wine's reputation is important to the wine consumers with a high level of self-reported expertise [7]. Namely, country of origin and region (AOC) are an indicator of quality [5]. Geographical certification and origin are the primary determinants of wine prices [12]. Wine can be categorized as credence good since it lacks readily comparable characteristics, which is one reason why a wine region is significant to buyers [23].

Consumers may draw conclusions about a wine's quality based on the information from the bottle and its label, such as price, grape variety, vintage, alcohol content, wine style, vineyard, brand name or awards [6]. But for a product like wine, the place of origin (country or region) is one of the most crucial selection factors based on country perception and associations [32]. It is a defined differentiator for wine perceived quality and a factor influencing customers' attitudes, preferences and willingness to pay more for a product [6, 24]. Geographical origin is important for triggering consumers' emotional response and purchase intent [21], and it influences the value of the wine consumption, making the wine's country or region of origin, the most trusted indicators [23]. Therefore, making the place of origin the key point in the

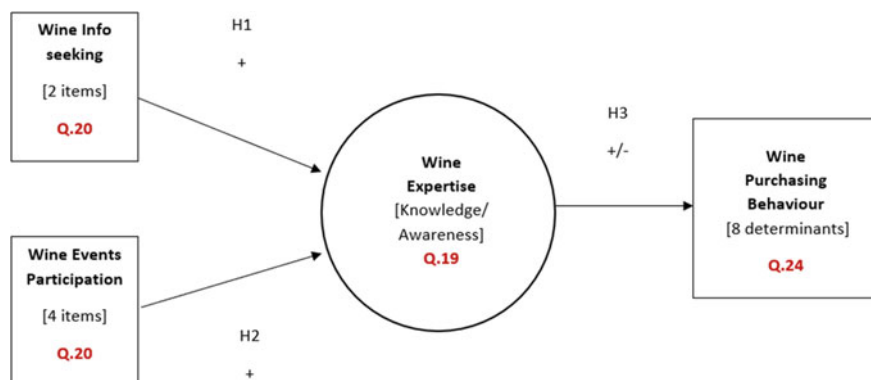


Fig. 29.1 Conceptual model

differentiation strategies for wine firms that aim for increasing purchase intention [3, 6]. Thus, the country of origin and region play an important role in purchase intent, especially in the willingness to pay higher prices for it, but what increases the level of importance of these factors to consumers. What is the role of expertise within purchase behavior, and how participation in wine events and information seeking contribute to this?

Within this context specifically the self-reported knowledge is relevant, the way that expertise is perceived by own individuals [10, 30]. Therefore, we evaluate the self-reported level of the expertise based on the assessment of individual interest and knowledge of wine. The following hypothesis are formulated (Fig. 29.1).

H1: Wine info seeking impacts wine expertise.

H2: Wine event participation impacts wine expertise.

H3: Wine expertise impacts wine purchasing behavior.

29.3 Methodology

29.3.1 Study Design

Quantitative methodology was chosen, and the data gathered through the questionnaire applied to the public at a wine event “Essência do Vinho” (19th edition), held in Porto in Palácio da Bolsa between 23 and 26 of February 2023. A convenience sampling technique was used resulting in 1314 valid responses.

First, descriptive statistic is elaborated in order to present sociodemographic characteristics of the participants, followed by analysis of wine info seeking, wine event participation, wine expertise and wine purchase behavior. Furthermore, to test the established hypothesis, we employ partial least squares (PLS) path analytical technique [26] to test our hypotheses.

29.3.2 *Sample*

The sample consists of 1314 responses gathered along 4 days of the event (23–26 of February 2023). Among the respondents 55.7% are male, 47.8% are single, 74.1% have at least a bachelor's degree, and 79.1% are professionally active. The average age of the sample is 37.4. The event was held in the city of Porto and brought 46% of participants that are outside of the Metropolitan Area of Porto and abroad, highlighting the importance of the *Essência do Vinho* in the context of tourism development and socioeconomic impact of the city (Table 29.1).

29.4 Results

More than half of the sample consists of the participants who actively seeking information about the wine by acquiring publications and consulting internet sites specialized in wines, likewise participating in wine events, namely in wine fairs, visiting cellars and wine tastings. Attending a wine workshop or course has less adherence, but still, it is frequently and very frequently attended by 36% of the respondents. Predominantly, the participants reveal high interest in wine—85.5% is interested and very interested. Knowledge is less reported, only 16.1% consider themselves as great connoisseur, and 44.1% as a connoisseur.

At the moment of purchase, the highest appreciation as important and very important is value for money, and 86.1% of respondents provided this evaluation. Recommendation is the following factor that is considered as important and very important by 80.7% of respondents. Followed by region (76.6%), origin (country) (74.3%), price (70.2%), certification (62.8%), brand (56.4%) and packaging (bottle/label) (51.2%) (Table 29.2).

The PLS method was conducted in two stages. Initially, we evaluated the model's reliability and validity, followed by an assessment of the structural model (Chin 2010). To determine the statistical significance of the path coefficients, we adhered to the guidelines outlined by [15] and utilized a bootstrapping procedure with 5000 bootstrap samples. The model's reliability and validity were assessed by examining internal consistency, convergent validity and discriminant validity. The results are presented in Table 29.3. The construct's reliability was evaluated using Dijkstra-Henseler's rho (ρ_A) [17] and composite reliability (CR). The composite reliability values indicated satisfactory internal consistency, as all values exceeded 0.7 [14]. In terms of convergent validity, we identified one item from the “closest to the person” construct that exhibited an indicator loading below the 0.7 threshold and subsequently removed it. However, all latent variables demonstrated adequate convergent reliability, with their average variance extracted (AVE) values surpassing 0.5 [4].

Additionally, the model successfully demonstrated discriminant validity, as indicated in Table 29.4, where the squared average variance extracted (AVE) values exceeded the correlations shared by the corresponding paired constructs [17]. To

Table 29.1 Sample

Variables	No.
<i>Total sample</i>	1314
<i>Dates</i>	%
Feb 23	25.1%
Feb 24	24.4%
Feb 25	27.8%
Feb 26	22.7%
<i>Sociodemographic characteristics of visitors</i>	
<i>Gender</i>	%
Female	43.2%
Male	55.7%
I'd rather not say	1.1%
<i>Average age</i>	37.4
<i>Marital status</i>	%
Single	47.8%
Married/non-marital partnership	41.5%
Divorced	9.4%
Widower	1.4%
<i>Education</i>	%
Basic	1.8%
Secondary	24.1%
Bachelor	50.2%
Master's or PhD	23.9%
<i>Working conditions</i>	%
Self-employed	22.8%
Employee	56.3%
Student	11.5%
Unemployed	4.6%
Reformed	3.5%
Domestic	1.4%
<i>Nationality</i>	%
Portugal	79.15%
Other	20.85%
<i>Within other nationalities:</i>	%
Spanish	17.20%
USA	9.50%
Italy	8.80%
German	7.70%
France	5.10%

(continued)

Table 29.1 (continued)

Variables	No.
United Kingdom	4.70%
Others	47.20%
<i>Residence</i>	%
Portugal	84.63%
Abroad	15.37%
<i>Description of residence in Portugal</i>	%
Porto's metropolitan area	63%
Other municipalities	37%
<i>Residents outside of PMA and abroad</i>	46%

further assess discriminant validity, we use the heterotrait-monotrait (HTMT) ratio of correlations [17]. For structural models involving conceptually distinct constructs recommend a threshold value of 0.85 [17].

All path coefficients yielded significant results at the 0.001 level, providing support for H1 ($\beta = 0.200$, $p < 0.001$), H2 ($\beta = 0.383$, $p < 0.001$) and H3 ($\beta = 0.221$, $p < 0.001$). The coefficient of determination, denoted as R² or in-sample predictive power [25], ranges from 0 to 1, with higher values indicating stronger explanatory capabilities (Table 29.5). In this study, the constructs accounted for 29.9% of the variance in wine expertise and 14.9% of the variance in wine purchasing behavior.

29.5 Discussion and Conclusion

Wine event as Essência do Vinho is a pillar stone in the development of wine interest and expertise among consumers and one of the crucial elements in developing global tourism activities, representing a unique marketing opportunity for participating wine firms [31]. We found that there is a significant part of consumers that are drawn by curiosity and leisure, representing potential new wine fans where this marketing opportunity can take place. Nevertheless, more than half of the public reveal a high level of interest and knowledge in wine, and attending this event can raise its awareness about the Portuguese wine market.

Obtained findings contribute to the literature that reflects the importance of the knowledge within purchasing behavior [1, 5, 7, 8, 10, 29, 30, 34]. But especially it contributes to filling the gap within the understanding how self-reported wine knowledge and information seeking is relevant to purchase behavior [10]. Namely, we confirm that more knowledgeable consumers are less price sensitive and rely more on their knowledge and subsequent appreciation of the place of origin of the wine at the moment of purchase.

Therefore, indeed the place of origin is a strong factor of purchase intention [3, 6, 21, 23, 24, 32], especially when we are considering consumers with a high level

Table 29.2 Consumer behavior toward wine

Wine info seeking	Frequently and very frequently %
Acquire publications specialized in wines	50.2%
Consult Internet sites specialized in wines	56.5%
<i>Wine event participation</i>	<i>Frequently and very frequently %</i>
Participate in wine fairs	54.6%
Visit the cellars	58,3%
Participate in wine tastings	57.9%
Attend a wine workshop or course	36.0%
<i>Expertise</i>	
<i>Interest</i>	%
Very interested	48.6%
Interested	36.9%
Limited interest	12.6%
No interest	2.0%
<i>Knowledge</i>	%
Great connoisseur	16.1%
Connoisseur	44.1%
Limited knowledge	33.0%
No knowledge	6.8%
<i>Purchase behavior</i>	
<i>When buying wine, the importance attributed to:</i>	<i>Very important and important in %</i>
Origin (country)	74.3%
Region	76.6%
Certification	62.8%
Brand	56.4%
Packaging (bottle/label)	51.2%
Price	70.2%
Value for money	86.1%
Recommendation	80.7%

of self-reported knowledge [10, 30]. Indeed, limited wine knowledge is a constraint in wine consumption [1, 30], as it makes consumers more insecure in making their own choices relying more on value for money, price and recommendation factors.

In the literature it is confirmed that expertise leads to higher search activity [29, 30], and we clearly see this interplay between self-reported interest and knowledge and wine info seeking and wine event participation interplay. In this case, we see that they impact how the expertise is perceived by the participant.

This highlights, from management and marketing perspective, that stimulation of information seeking and participation in the wine events is key in increasing wine

Table 29.3 Estimates of the measurement model parameters

Constructs/items	Loadings	Dijkstra-Henseler's rho (ρ_A)	CR (AVE)
<i>Wine information seeking</i>		0.841	0.923 (0.857)
Acquires specialist wine publications	0.917		
Access to specialized wine websites	0.935		
<i>Wine event participation</i>		0.886	0.917 (0.735)
Attend wine fairs	0.871		
Visit a wine cellar	0.861		
Participate in wine tastings	0.887		
Attend a workshop or wine course	0.807		
<i>Wine expertise</i>		0.784	0.851 (0.741)
Rate your interest in wine	0.788		
Rate your knowledge in wine	0.928		
<i>Wine purchasing behavior</i>		0.839	0.802 (0.758)
Country of origin	0.823		
Region	0.853		

Table 29.4 Discriminant validity assessment

	Fornell-Larker criterion				Heterotrait-monotrait ratio (HTMT)			
	1	2	3	4	1	2	3	4
1. Wine information seeking	0.926							
2. Wine events participation	0.529	0.857			0.455			
3. Wine expertise	0.530	0.480	0.861		0.610	0.650		
4. Wine purchasing behavior	0.248	0.221	0.281	0.898	0.299	0.248	0.219	

Notes Diagonal elements in bold are the square root of AVE, which is the shared variance within a construct. Off-diagonal elements are the correlations between constructs. To have discriminant validity, diagonal values should be larger than off-diagonal values

expertise that impacts appreciation of the place of origin and subsequent willingness to pay. Thus, promoting awareness and expertise among consumers is the key to increasing competitiveness of the wine sector.

Table 29.5 Results of structural equation model test

Hypotheses				Path Coeff (β)	t-statistic	Confidence interval (95%)	Supported
H1	Wine information seeking	→	Wine expertise	0.200***	8.826	[0.181; 0.278]	Yes
H2	Wine event participation	→	Wine expertise	0.383***	11.482	[0.317; 0.449]	Yes
H3	Wine expertise	→	Wine purchasing	0.221***	5.901	[0.132; 0.267]	Yes

This research was applied to a wine event in Portugal that implies, on one hand, that the public is more interested in wine than a general one and, on the other hand, reflects a specific context; therefore, an extension of the research toward the general consumer in different national contexts is required. Furthermore, methodological framework accesses the impact of wine info seeking and wine events participation on expertise; however the interaction between this construct is also an issue for further exploration. Additionally, further research may address the segmentation of the participant in the wine events based on the self-reported knowledge levels and its subsequent purchasing behavior, what factors are more valued by different consumer segments?

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Chapter 30

The Role of Sociodemographic Characteristics on the Journey from Brand Experience to Brand Love and Loyalty—Porto



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Abstract Development of an emotional attachment to the brand is a key issue in brand management, making constructs such as brand experience, brand satisfaction, brand love, and brand loyalty one of the most addressed topics in marketing research, specifically, the destinations brands, such as of city of Porto. Within this debate, special attention is given to sociodemographic characteristics and the role they have within this journey. Namely we address the impact of gender, age, educational qualifications, marital status, and residence on brand experience, brand satisfaction, brand love, and brand loyalty. Our findings indicate that these characteristics do play the role. Positive brand experience-affecting factors include being female relative to male, being older (the higher the impact), and being a tourist relative to not being a tourist. Non-tourists (those who reside in Portugal or Porto) have an advantage over tourists in terms of brand loyalty and customer satisfaction. Age and gender have also shown importance. Marriage status and level of education were important components of brand loyalty. Gender had no effect on brand love, but age (which

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rises with maturity), education level (which rises with credentials), and marital status (being married or widowed) all had favorable impacts.

30.1 Introduction

Currently the development of an emotional attachment to the brand is a key issue in brand management [9]. Brand love is a construct that describes the affective feelings of a group of satisfied consumers [20]. In this context, destination brand love addresses tourists' long-term relationships with destination brands, as it leads to favorable behaviors, such as raising loyalty to the destination, forgiveness for negative experiences, and willingness to invest [5, 33].

Increasingly, consumers do not opt for the brand solely on the basis of its quality and durability [24]. In contrast to utilitarian characteristics related to the specific product or service, brand personality tends to serve a symbolic function [9]. The consumer develops a love for the brand on the basis of a strong brand personality, attributing to them and imbuing them with different personality characteristics [9].

To achieve destination's brand love and loyalty there is journey that is a subject of active investigation [24, 33] that this research intends to contribute. In specific, within this journey to brand love and loyalty there is a call for further research over the influence of sociodemographic variables on it [26, 32, 35, 14]. There are contradicting findings in the literature, on the one hand their influence is considered relevant, for instance especially in relation to gender [35], and on the other hand showing that their impact is insignificant [25, 28]. In this regard, the question arises do sociodemographic characteristics play the role in the evaluation of brand experience, satisfaction, love, and loyalty? Thus, the objective of this study is to analyze the journey to brand love and loyalty and the role of sociodemographic characteristics on it.

As a scenery the case study of the city of Porto is chosen. It is the 2nd largest city of Portugal that have evidenced touristic growth in the last decade, especially due to the awards given to the city as "Best European Destination" in 2012, 2014, 2017 and 2022. This recognition contributed to the growing popularity of the city that became one of the most desired destinations to visit [36]. On September 29, 2017, the brand "Porto" was created, which was conceived by designer Eduardo Aires [2] and recognized internationally in a short time. The factor of great importance of this recognition is the level of expansion and visibility in which the brand places the city to the world bringing recognition to the local culture and tourism.

30.2 Brand Experience, Satisfaction, Loyalty, and Love

A destination or location brand can be defined as a way to communicate the unique identity of a destination that contains a number of intangible and tangible elements and distinguish it from competitors [7, 21]. In this regard, a brand of a destination has two important functions: differentiation and identification. The brand image of a tourist destination is one of those intangible elements, to which tourism marketing has given monetary importance [31].

According to Alloza [4], the brand experience can be defined as the perception of consumers, at each moment of the contact they have with the brand, whether in the brand images projected in advertising, during the first personal contact, or the level of quality in relation to the personal treatment they receive. Brand experience is created when customers use the brand; talk to other people about the brand; and look for more information, promotions, and events [6, 22]. Brand-related stimuli appear as part of a brand's design and identity (e.g., name, logo, sign), packaging, and marketing communications (e.g., advertisements, brochures, websites), and in environments in which the brand is marketed or sold (e.g., stores, events). These brand-related stimuli constitute the main source of subjective and internal consumer responses, which is referred to as the "brand experience" [12]. Thus, a brand experience is defined as subjective, with internal responses of the consumer through feelings and sensations, as well as behavioral responses through stimuli that relate to the brand and its entire design.

Brand satisfaction is a desired outcome of brand experience. Satisfaction is defined as a positive affective reaction to a result of a previous experience further impacting subsequent purchases, completing a cyclical pattern and forming a long-term relationship of loyalty [3, 11, 16, 24]. According to Sadeque et al. [33] satisfaction with the various points of the city is a fundamental pillar in the development of the city's brand love.

Consumers perceive the objects they love as being integrated into their identity [1]. Brand love is a type of relationship that consumers establish with brands, encompassing multiple cognitive, affective, and behavioral elements revealing the degree of emotional passion and attachment that a satisfied consumer has for a particular brand [9, 10, 19, 20, 24, 33].

One of the lines of research affirm that satisfaction is an antecedent of loyalty, as increase in satisfaction leads to increases in brand loyalty [11, 18, 34]. Loyalty represents a deeply held commitment to product/service preference consistently in the future [13].

Brand loyalty is seen as an outcome of brand love [20], reflected in positive word-of-mouth, active commitment, and willingness to pay a higher price for the chosen brand [24], ultimately leading to enhanced economic, competitive, and strategic advantages and increased brand profitability [29, 30].

30.3 Methodology

30.3.1 *Questionnaire Description*

The questionnaire consists of two main parts: sociodemographic characteristics (gender, age, nationality, education, and marital status) and the four dimensions of the brand (brand experience, brand satisfaction, brand loyalty, and brand love). It was also asked if the respondents were a tourist in the city of Porto.

To measure brand experience, 6 items extracted from Brakus et al. [12], adapted to the study context, were used. Brand loyalty was measured using six items adapted to the study context by Morrison and Crane [29]. Brand satisfaction was measured using five items from scales developed by Garbarino and Johnson [17], Martensen and Grønholdt [27], Devaraj et al. [15], and Jamal and Goode Mark [23]. To assess brand love, we used six items from the reduced scale by Bagozzi et al. [8]. A 5-point Likert-type scale (1 = strongly disagree; 5 = strongly agree) was used on all scales.

The data was collected through a face-to-face survey carried out during the month of April 2023 in the reference areas of Porto (São Bento, Aliados, Trindade, Boavista, and Bolhão); the anonymity of the participants was guaranteed, obtaining 212 valid responses.

30.3.2 *Data Analysis*

The sample profile and the descriptions of the scale items were determined using descriptive statistics. The Cronbach's alpha coefficient was employed to calculate internal consistency reliability. When is at least 0.70, an instrument is regarded as having adequate reliability. We used principal component analysis with varimax rotation to evaluate the 24 scales' statements. In order to verify the factorability and sufficiency of the analysis, the Kaiser–Meyer–Olkin (KMO) test of sample adequacy and Bartlett's test of sphericity were applied. In order to explain how sociodemographic factors affect the four categories, we additionally employ a linear multiple regression analysis. We make use of SPSS (version 29) for the analysis.

30.4 Results

30.4.1 *Sample Description and Constructs*

The details of the sample are shown in Table 30.1. From the sample of respondents, the majority were female (60.4%), with higher education (75.5%), single (78.3%), Portuguese nationality (97.2%), and with an average age of 30.6. It was also found that 39.6% of respondents were doing tourism in the city of Porto.

Table 30.1 Sociodemographic characteristics

Variable	Description	%
Gender	1-Female	60.4%
	2-Male	39.6%
Age	Age	30.6*
Nationality	1-Portuguese	97.2%
	2-Other	2.8%
Educational qualifications	1-Elementary studies	1.9%
	2-Secondary studies	22.6%
	3-Degree or master's/PhD degree	75.5%
Marital status	1-Married/non-marital partnership	19.3%
	2-Divorced	2.4%
	3-Single	78.3%
Tourist in the city of Porto?	1-Yes	39.6%
	0-No	60.4%

* Note the value corresponds to the average age of the sample

In relation to the analysis of the psychometric properties of the constructs, it is possible to observe that all measures used in this research had adequate internal consistency (see Table 30.2). On a 5-point scale from low to high, these mean scores suggest that it was relatively high and slightly above the neutral midpoint of 3.00.

Table 30.3 specifically described the items, mean, and standard deviation of the brand experience, brand satisfaction, brand loyalty, and brand love constructs. As it is possible to observe, in brand experience construct, the item “Transport is important in the destination-brand experience” stands out with the highest mean value of 4.69. This construct is also the one with the highest average and it is important as well to emphasize the items “Attractions are important in the destination-brand experience”, “Customer service is important in the destination-brand experience”, and “My stay/visit to the city of Porto is or was positive” featuring mean values of 4.58, 4.57, and 4.56, respectively. Looking at the brand satisfaction construct, the affirmation “I will recommend (friends, family, ...) To visit Porto” is highlighted by the sample with an average of 4.70. Furthermore, in terms of the brand loyalty also with a mean value of 4.70 the item “I will revisit the city in the future” is highly emphasized by the sample. Finally, in the construct brand love, the items “The destination brand makes

Table 30.2 Descriptive statistics for study variables

Variables	Mean (SD)	Cronbach's alpha
Brand experience	4.52 (0.15)	0.793
Brand satisfaction	4.23 (0.32)	0.862
Brand loyalty	4.32 (0.31)	0.743
Brand love	4.03 (0.46)	0.943

me feel good” and “I feel a deep affection for the destination brand” are the most cited with mean values of 4.16 and 4.15, respectively.

The exploratory factor analyses were performed for each scale, through a principal component analysis and a varimax rotation. All constructs have shown eigenvalues over Kaiser’s criterion of 1 and explain above 48%. A loading of 0.40 was applied as the cut-off for inclusion. All items were included in the constructs.

The sociodemographic factors that have an impact on the four constructs are shown in Table 30.4. Being a female relative to a male, being older (the higher the impact), and being a tourist relative to not being a tourist are all factors that positively affect brand experience. Non-tourists (those who live in Portugal or Porto) have a positive influence on tourists in terms of brand satisfaction and brand loyalty. Age and gender also demonstrated significance. The degree of qualifications and marital status were also significant factors in brand loyalty. According to this model, gender had no bearing on brand love, but age (which increases with adulthood), degree of education (which increases with qualifications), and marital status (being married or widowed) all had positive effects.

30.5 Discussion and Conclusion

Following the suggestion of Christino [14], Loureiro et al. [26], Rahman et al. [32], and Verma [35] we have explored the impact of sociodemographic characteristics on the constructs of brand experience, brand satisfaction, brand love, and brand loyalty. To begin with, based on the results we see that city of Porto provides positive experiences with high levels of satisfaction; therefore the intentions to recommend the city and repeat the visit received the highest scores. But the positive experience has the highest average, that is reflected in the brand loyalty that is the second highly evaluated item; meanwhile satisfaction received less average value than the brand loyalty. These findings are in line with the literature highlighting the importance of brand experience for brand loyalty [3, 6, 11, 16, 22, 24]. However, from our study we cannot conclude that loyalty is seen as an outcome of brand love [20], as interestingly, the average for brand love is lower than the other constructs.

On the other hand, we confirm that sociodemographic characteristics play the role on the evaluation of brand experience, satisfaction, love, and loyalty corresponding to Verma [35] and contradicting indicated by Mishra and Prasad [28], Kumar et al. [25]. Curiously, being a female has an impact on brand experience, satisfaction, and loyalty, but not brand love. Older age has shown impact on all constructs, reflecting a more effective relationship with the destination image. Higher degree of qualifications and being married brought more brand love and loyalty. Non-tourist respondents revealed a more emotional connection with a city’s brand, as long as tourist evidenced positive experience.

From a marketing perspective, the core fans of the city’s brand are older, married, and higher educated segments of residents, as they reveal more affective relationship

Table 30.3 Descriptive statistics (mean and standard deviation) and factorial analysis of Porto brand

Item	Mean	Std. dev	Loading* (factorial analysis)
<i>Brand experience</i>			
My stay/visit to the city of Porto is or was positive	4.56	0.68	0.706
Attractions are important in the destination-brand experience	4.58	0.65	0.796
Accommodation is important in the destination-brand experience	4.47	0.69	0.714
Transport is important in the destination-brand experience	4.69	0.58	0.692
Customer service is important in the destination-brand experience	4.57	0.64	0.672
I am satisfied with the various elements (attractions, accommodation, transport, and customer service) in the destination-brand experience	4.23	0.73	0.625
<i>Brand satisfaction</i>			
Overall, I'm satisfied with the destination brand	4.37	0.70	0.829
When I compare the brand with other destination brands, I'm very satisfied with the Porto brand	4.25	0.74	0.845
The quality of the destination brand is always excellent	4.06	0.78	0.858
The brand's value for money exceeds my expectations	3.74	0.89	0.652
My decision to choose this destination brand is the right one	4.25	0.80	0.783
I will recommend (friends, family, ...) to visit Porto	4.70	0.60	0.666
<i>Brand loyalty</i>			
I will revisit the city in the future	4.70	0.60	0.827
I feel emotionally attached to the destination brand	4.45	0.89	0.847
Satisfaction influences my loyalty to the destination brand	4.45	0.74	0.911
If my satisfaction decreases on future visits, so does my loyalty to the destination brand	3.86	1.12	0.924
I feel confident in the destination brand	4.33	0.76	0.941

(continued)

Table 30.3 (continued)

Item	Mean	Std. dev	Loading* (factorial analysis)	
I feel committed to the destination brand	4.08	0.91	0.880	
<i>Brand love</i>				
I feel a deep affection for the destination brand	4.15	1.04	0.827	
I miss the destination brand if I don't visit for a long time	3.85	1.08	0.847	
The destination brand is a marvelous brand	4.11	0.92	0.911	
The destination brand makes me feel good	4.16	0.90	0.924	
The destination brand makes me very happy	4.05	0.94	0.941	
I love the destination brand	3.85	1.14	0.880	
<i>The identification of the latent constructs: factorial analysis</i>				
	Loading*			
<i>Statements</i>	Brand experience	Brand satisfaction	Brand loyalty	Brand love
Eigenvalues/rotation sums squared loadings	2.962	3.619	2.932	4.748
Variance (%)	49.36	60.32	48.86	79.13
KMO test	0.779	0.853	0.761	0.906
Bartlett test (sig)	316.836 (0.000)	522.077 (0.000)	341.261 (0.000)	1093.225 (0.000)

Note * Extraction method: principal component analysis. Rotation method: varimax with Kaiser normalization; ** The results of KMO and Bartlett tests confirm the factorability and the adequacy of the analysis

Brand Experience, Brand Satisfaction, Brand Loyalty, and Brand Love

indicating the need on improving satisfaction, love, and loyalty dimension for tourist participants.

Therefore, we provide a contribution to the marketing theory on an ongoing debate of the journey to brand love and loyalty and the role of sociodemographic characteristics on it demonstrating that they do play the role. From the managerial perspective, these findings confirm the necessity for destination managers to adapt communication and provided offer depending on different segments visitors accounting for sociodemographic characteristics.

Further research should explore that the impact of the impact of experience and satisfaction is significant on brand love and subsequent brand loyalty, accounting for sociodemographic characteristics.

Table 30.4 Econometric model—sociodemographic variables as predictors of brand experience, brand satisfaction, brand loyalty, and brand love

Variables	Brand experience	Brand satisfaction	Brand loyalty	Brand love
Gender	0.300*	0.180**	−0.023*	0.351
Age	0.020**	0.109**	−0.210**	0.006**
Educational qualifications	0.198	0.136	0.260**	0.069*
Marital status	0.021	0.215	0.205**	0.177**
Tourist	0.225*	−0.149**	−0.167*	−0.291**
Constant	0.566***	0.185***	0.279***	0.299***
R ²	0.343	0.411	0.390	
ANOVA test	12.304***	14.760***	13.682***	

Notes The beta value is for the step at which the variables were entered. Significant at: * $p < 0.10$ level; ** $p < 0.05$ level; *** $p < 0.01$

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Chapter 31

Perception of Risk and Identification of Security Measures When Visiting Cultural Heritage



Jorge Marques and Fátima Matos Silva

Abstract The perception of safety is essential during tourist visits to historical monuments, whether they are built architectural heritage, civil, military, vernacular, or archaeological. This perception of security helps to guarantee, on the one hand, the physical integrity of visitors and, on the other hand, the preservation of different types of heritage. Many places visited have unique architectural characteristics, especially in the case of old buildings where architectural barriers and limited accessibility are more evident, with particular emphasis on castles, forts, fortresses, and archaeological heritage. Accidents in these places are relatively frequent, mainly related to falls by visitors. In this context, this article intends to address, in an introductory way, the need to study the perception of risk associated with visiting historic sites, to identify weaknesses and opportunities, and to enable the implementation of coherent strategies and actions to limit the risk of accidents, thus increasing the safety of visitors. A theoretical framework on the risk associated with visiting cultural heritage is presented, and the methodological procedures that will be developed in a more comprehensive research project on the subject are identified.

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31.1 Introduction

When visiting any historical or archaeological monument, visitors are generally exposed to various potential hazards, such as falls or accidents involving pavements, structures or equipment installed in these places. Added to this is the fact that many of the sites visited have unique architectural characteristics, especially in the case of old buildings where architectural barriers and limited accessibility are more evident, with particular emphasis on castles, forts, forts, fortresses, and archaeological heritage. Thus, there is still a long way to go about the safety of visitors, as accidents, such as falls, have been relatively frequent in recent years.

Many places have adopted some security measures to minimise these risks, such as installing fences and security barriers, placing signage signs, and performing regular maintenance on the structures. In addition, it is vital that tourists are informed about the risks involved in visiting these places and that they follow the safety instructions provided by the officials responsible for maintaining the site. However, these security measures still need to be improved, adding to the fact that they are only sometimes used consistently in all places.

On the other hand, the security issue is also crucial from the perspective of preserving cultural heritage insofar as the actions of visitors can cause damage, whether intentional or not. For example, the tendency to touch objects on display or access unauthorised places can lead to problems in terms of security, both for the visitor and the property.

Therefore, to guarantee greater security for visitors and the protection of cultural heritage, it is essential to apply more appropriate security measures, such as installing clear signs, physical barriers, and monitoring plans (in person or by video surveillance). It will also be necessary for visitors to be more aware of safety rules and proper behaviour during the visit. In summary, the safety of tourists when visiting different types of cultural heritage depends on adopting adequate security measures and making tourists aware of the risks involved in visiting these places.

In this context, this article intends to introduce, in an introductory way, the perception of the risk associated with visiting historical places and outline a methodological plan that allows the identification and implementation of coherent and homogeneous strategies and actions to limit the risk of accidents, thus increasing the safety of visitors, on the one hand, and of heritage on the other.

31.2 Theoretical Background

The socioeconomic development of societies, the improvement in the quality of life, the increase in free time, and the consequent greater access to travel and leisure activities are just some of the factors that have contributed to the development of tourism on a global scale. However, this growth and new trends in demand require balancing the dynamic tension that characterises the relationship between tourism development

and the protection of the cultural landscape [18] since tourism can negatively impact natural and cultural resources. Therefore, monitoring cultural heritage is essential to ensure the sustainability of regions [6].

The preservation of archaeological and heritage sites is of great importance since they are non-renewable resources that must be protected to ensure their sustainability for future generations [10]. New approaches advocate the involvement of local people in the development of heritage management plans, as they increase residents' awareness of their value and contribute to the sustainable protection of heritage [15, 22]. They also stress the need to consider the tourist experience in heritage management "to achieve the objective of sustainable heritage tourism" [12, 269]. Although natural and cultural resources are the main attractions of a territory and the basis of its competitive advantage and endogenous growth, it is essential to consider how resources are incorporated into qualified tourism products to satisfy the needs and expectations of tourist demand, especially in terms of activities and cultural experiences in world heritage destinations [14]. Thus, it is essential to have satisfied tourists and involved stakeholders to achieve sustainability in these heritage sites [9].

Responsible tourism is essential, and the correct use of heritage is the best guarantee of its conservation [23]. Accessibility to heritage sites is considered a way to promote sustainable heritage management. The concept of universal accessibility is generally characterised by physical and architectural aspects—spatial accessibility—but it goes much further since it also concerns the accessibility of information, social, intellectual, and emotional components [19]. It means that everyone, with or without special needs, must be able to participate in all activities that include products, services, or information. Universal accessibility implies elements such as: (i) clarity of access information (e.g. signage); (ii) physical and architectural aspects with different adaptations; (iii) various levels of information and various forms of communication, including virtual accessibility [1, 13, 20] based on various aspects, such as cognitive and intellectual aspects, at different stages of life of each type of audience [21]. The promotion of accessible and sustainable cultural tourism can be carried out by implementing a study organised innovatively through "pioneering services, products and technical processes" [2, 277].

31.2.1 Risk Perception

With the increase in tourism, there have also been more significant concerns related to security issues [4]. Attention to this topic increased significantly after the 11 September 2001 attacks on the Twin Towers. Since then, studies on risk perception have focused mainly on issues related to terrorism, natural disasters, political instability, epidemics and pandemics, crime, and local violence [7, 8, 17].

Since the safety factor is challenging to quantify, if not impossible, it becomes inevitable to associate the concept of risk perception with the concept of safety of a destination [11]. Although the perception of risk may always exist during tourist

activity, each visitor sets his/her limit regarding the actions he is willing to carry out, considering his assessment of the level of risk [3, 5]. In this context, how tourist destinations manage effectively, the perception of security associated with their territories will influence the perception of risk and, in turn, the motivation and process of choice on the part of tourists [4].

Over the last few decades, topics related to the perception of risk and the safety of destinations have been widely studied. In one of the first works carried out in this area, Roehl and Fesenmaier [16] concluded that the perception of risk by leisure tourists is mainly related to the equipment, the trip, and the destinations. They also concluded that the perception of risk is influenced by the demographic characteristics of tourists and, as such, differs from person to person [16]. Cui et al. [4] carried out a literature review on the subject and identified that the perception of risk in tourism can be analysed according to three different perspectives:

- (1) The perspective of subjective feelings, which is related to the physical characteristics and the psychological processes of tourists;
- (2) The perspective of objective assessment, which includes physical, infra-structural, economic, social, psychological, and temporal risks and those related to the opportunity cost;
- (3) The perspective of raising awareness about the potential impacts or negative consequences that may occur during a trip.

In this context, Cui et al. [4] concluded that the perception of risk and the respective risk assessment are influenced by subjective factors (intrinsic characteristics of tourists) and objective factors (possible consequences and negative impacts that may occur during a trip). More recently, Seabra and Korstanje [17] identified the three main theoretical approaches that encompass studies on risk perception:

- (1) The demographic approach, based on factors such as age, gender, and level of education, among others;
- (2) The psycho-sociological approach, based on factors such as personality, character, and cultural differences, among others;
- (3) The critical perspective approach crosses the perception of risk with ideological issues.

Although there is research in risk perception, more attention should be paid to issues related to the perception of risk and security in a more specific context related to the cultural heritage of tourist interest. The literature in this area needs to be more robust. Regarding the security associated with tourism, the literature often takes us to factors related to crime, conflicts between the local population and visitors, terrorist attacks, wars, and social upheavals. The specific issue of visitor safety in spaces with reduced or limited universal accessibility has not received due attention from academia or public and private agents associated with cultural and natural spaces. Despite the increasing number of accidents with tourists during visits to walls, towers, and other historical monuments, actions to limit and reduce the risk of accidents continue to have little expression. Thus, scientific research applied to this area is justified to overcome these limitations.

31.3 Method and Data Collection

The methodological design proposed here is based on qualitative, quantitative, and mixed approaches, depending on their adequacy to the various lines of research envisaged.

More specifically, the intention is to carry out:

- (1) A systematic review of the literature on the subject of risk perception and safety issues during visits to cultural heritage;
- (2) Prepare technical sheets based on direct observation in order to inventory the state of the cultural heritage, by sampling, concerning the implementation of security measures;
- (3) Develop a survey questionnaire for visitors to cultural heritage in order to assess the perception of risk during the visit;
- (4) Identify a set of proposals to be implemented in cultural heritage to increase risk perception and security levels.

The research project adopts several methods, combining quantitative and qualitative techniques, various data collection techniques, and analysis of primary and secondary data and encompasses three main phases:

- (1) Development of the conceptual framework;
- (2) Empirical study;
- (3) Dissemination of results.

Firstly, the development of a conceptual framework will be defined with a systematic review of the literature on the main concepts to be analysed: (i) risk perception; (ii) security associated with the heritage; (iii) universal accessibility and sustainability of heritage; (iv) collective memory. Thus, several topics will be reviewed: cultural heritage and security, cultural heritage and risks, universal accessibility, and routes and networks.

The empirical study begins with defining the territorial context and identifying the primary tourist-cultural resources. This selection of the elements to be studied will be made by sampling the different types of cultural heritage, emphasising the built architectural heritage.

Geographic Information Systems (GISs) will produce an inventory of tourist-cultural resources in an integrated database, allowing a better interpretation of the decision-making process. The empirical study continues with assessing the risks and safety of the cultural heritage.

Intensive fieldwork is expected to be carried out to assess the risks and safety of cultural resources, which will allow the preparation of a document with guidelines on the issues in question. This investigation will be based on sheets adapted for the purpose and elaborated after a meticulous analysis of the essential types of cultural heritage. These are sheets with specific fields for each component of the different spaces that comprise the cultural resources under study. They provide results in percentages of compliance with the degree of security for each specific space and a general percentage.

At the same time, a study will be carried out on physical accessibility, but also, with particular emphasis, on information (such as signage) and communication accessibility, as well as on information accessibility and virtual accessibility.

31.4 Conceptual Model

The literature review will contribute to developing a conceptual model of the specific areas to be analysed to achieve the main objective of this project. This model supports identifying central concepts and ideas in an integrated and collective structure to define additional steps until the proposal of specific results.

Through the analysis of Fig. 31.1, it is possible to understand that there are nine central concepts/ideas that must be evaluated: GIS analysis, tourist routes, tourist experience, Sustainable Development Goals (SDGs), universal accessibility, risk perception, identification of security measures, solutions to mitigate the risk, solutions to increase security.

These central concepts will be evaluated through an empirical study, which will be the next step in developing this investigation. The empirical study will identify the primary cultural heritage resources with tourist visitation.



Fig. 31.1 Conceptual model for cultural heritage risk perception and security measures

It is also expected to produce a complete territorial analysis and maps of the main attractions and tourist resources. Geographic Information Systems (GISs) will be used to produce an inventory of tourist resources in an integrated database, allowing a better interpretation of the data and benefit the decision-making process. This analysis will clarify the visitor's experience and meanings, contributing to the design of cultural, natural, and archaeological routes associated with safety and risk models.

An analysis of the accessibility of cultural resources will also be carried out. With the information produced, it is expected to develop a set of actions, namely: (i) highlighting the development of cultural and archaeological routes whose degree of risk and safety and also accessibility are acceptable or in need of improvement; (ii) a proposal for the implementation of new tourist experiences and the development of information aimed at the local community, stakeholders, and the general public who wish to know about the topics in question.

The results result from the interaction and combination of all the data acquired with the research carried out in the previous tasks.

Each territory has specific characteristics that allow it to distinguish its product from the rest and create its own identity, considering the proposal of activities for everyone. In this context, there will be a methodology with four phases to be developed:

1. Treatment and analysis of existing and compiled data;
2. Development of the diagnostic report;
3. Construction of the digital catalogue of equipment and cultural products;
4. Proposal for thematic routes.

In addition to the proposals for implementing accessible cultural routes, recommendations, evaluation, and adaptation measures will be suggested so that technicians have support and a guide/manual of good practices to follow when implementing solutions.

31.5 Conclusion

The sustained development of any structure, society, or nation is based on the knowledge that is acquired through education, training, and research, which is why it is fundamental for development to value people while institutions are valued. A sharp critical sense and a good knowledge of reality are also necessary, a clear definition of strategies that allow the construction of the necessary scenarios for the development of projects to adapt different types of buildings to new functions, namely the visitation space.

From a heritage perspective, security is understood as the whole series of actions explicitly addressing the building, collections, and people, with the ultimate objective being the protection of cultural assets. However, the physical safety of visitors must receive greater attention, especially in contexts that represent a higher associated risk. In this way, security systems must be implemented that also include the external

relations of the spaces that can be visited with their primary partners (for example, firefighters and the police). In addition to the collection, they must protect their visitors and staff, other property, and reputation. Visitable heritage must therefore have the necessary security conditions to guarantee the protection and integrity of visitors, the respective staff, facilities, and cultural assets incorporated therein.

A Security and Emergency Regulation should be drawn up, in which the rules and procedures related to security should be analysed in more detail. Safety standards must be established after assessing the needs of each situation, considering the different spaces, equipment, and human resources.

It is essential, however, to point out, and going beyond the competencies of a Risk and Safety Prevention Plan, that in addition to physical intervention projects in the space, conceptual and dissemination projects must also be thought of, which are fundamental to the development of all cultural tourism activities.

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Chapter 32

Visiting Porto Through the Eyes of Eugénio de Andrade



Ana Ferreira  and Marta Villares 

Abstract Eugénio de Andrade would have celebrated his 100th birthday on January 19 this year. To honour this greatest poet of the Portuguese language, we intend to show the importance of his literary production in publicising and promoting different Literary Tourism offers in Porto. In this paper, we seek to reflect on the opportunity to use the poetic text as a source of information for getting to know the territory. The main goal is to promote literary tourism in the city of Porto through reading, textual interpretation and exploration of places, resulting in a proposal for a literary route as a tourism product in the city of Porto, based on excerpts from the work “Porto, os sulcos do Olhar”. Firstly, we clarify the relevance of this research through our bibliographical research. Next, we emphasise that the diversity of the offer is a fundamental asset for tourism development, given that the valorisation of a destination’s tourism depends largely on the diversity and authenticity of its products. The methodology followed will be based on a review of the available bibliography in order to help consolidate the idea that Eugénio de Andrade, one of the greatest contemporary Portuguese-language poets, gives us a vision of the city of Porto through his writing, which could be a decisive tool in affirming and promoting literary tourism in the city.

32.1 Introduction

The literary text, whether in prose or poetry, allows us to observe in the writer’s report the territory where the narrative takes place, its physical characteristics and human occupation. In other words, it presents us with the organisation of places at a particular

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period in time. The text also provides a comparison between the places described, many of which have been transformed, disappeared or are merely fictionalised, and those that exist today, giving visitors/tourists a personalised view of this territory as an individual experience.

Porto is one of the Portuguese cities that has most distinguished itself over the years by inspiring writers to the point of making it the landscape of their works. We would like to highlight Eugénio de Andrade, not only for his contemporaneity (the author would have celebrated his 100th birthday this year) but, above all, for the greatness of his work, which not only exalts the city of Porto but also highlights many of the great national writers who have praised Porto throughout the ages.

This is the city we want to show tourists; a favourite tourist destination, which still retains the identity traits that allow us to revisit it through the eyes of an artist who, with his sensitivity, shows us his city, a city of poets and writers.

The methodology followed was based on a review of the available bibliography in order to build the idea that literary tourism can and should be encouraged, since the exaltation of local identity is a differentiating factor in the tourism offer and literary routes are a crucial tool for dynamising and promoting this type of tourism.

32.2 Literature Review

32.2.1 *Literary Routes as Literary Tourism Tools*

Literary Tourism

Considering literary tourism as the travelling of people motivated by their love of reading, this branch of tourism that unites travel and literature is increasingly significant, given that travelling, which for years was only an adventure confined to intellectuals and lovers of literature, has become a new branch of tourism all over the world, literary tourism.

In fact, “literary tourism, cultural tourism directly associated with visits to places recognised for their relationship with literary works and/or authors, has been occupying an increasingly important place in the world of tourism and is currently expanding greatly, both in Portugal and in other countries” [6].

In fact, the concept of literary tourism has gradually established itself, expanding the opportunities for those who like to discover what exists in the places to which literary texts refer, in other words, “travelling to places famous for associations with books or authors” (Squire 1993, p. 5 in [8]).

Nowadays, Portugal also has its own niche of literary tourists and Porto, a city that has seen the birth, death and/or served as the setting for the works of so many artists and writers, has, over the decades, been a means of literary inspiration and a place of production for a large number of creators. Accordingly, we dare say that Porto is now a city that can play a decisive role in the development of literary tourism in Portugal.

In the words of António [7], Eugénio de Andrade is Porto, and Porto is Eugénio de Andrade. This paper is therefore a short essay to show how his work can be a motivation for travelling through the city and to the city.

Literary Routes

To make a tourist destination stand out means associating it with a specific value, different from the rest, which is why, as Ferreira (2021, p. 7) says, “the creation of a unique and attractive image is a decisive tool for identifying a destination and differentiating it from others, because in order to be competitive, a destination must be able to offer an experience that distinguishes itself from competing destinations, rather than attracting and satisfying its visitors”.

In this sense, literary routes act as an irresistible invitation, showing the real territory described by the authors and allowing the tourist/visitor to transpose their imaginary experience of reading into the real context, as they “allow the visitor to get to know the city as a material reality, as a space that allowed the writer to build and develop a scenario for the narrative, giving the tourist the possibility of observing the city in another way, that is, walking through the streets, observing the specific particularities of the city that they would not have access to by simply observing the geographical reality, without a literary route or itinerary” (Ferreira 2021, p. 102).

In fact, since “literary routes seek to establish a relationship between various places, landscapes or attractions associated with a writer or poet” [5], p. 25, they are designed both for the individual who already has prior knowledge of the work(s), and for the individual who has not yet learnt about the work(s) to which they refer, thus arousing the desire to get to know the work(s) on which that particular itinerary is based.

In this sense, literary routes represent a valuable and strategic tool for promoting and differentiating Porto as a destination, attracting an audience eager to immerse itself in the literary wealth the city offers.

32.2.2 Visiting Porto Through the Eyes of Eugénio de Andrade

Eugénio de Andrade and the City

Eugénio de Andrade lived in Porto for over fifty years, a city he developed an enormous passion for, which he reflected in several of his works. In fact, a large part of his work celebrates Porto, leaving us his testimonies of life in the city, a city to which he himself attributes different physiognomies when he says that “the Porto of Fernão Lopes is almost legendary: heroic and honourable; that of Camilo, grotesque and dramatic; that of Garrett, ironic, picturesque and sentimental... The virile city of Fernão Lopes is still that of Herculano, Ramalho, Jaime Cortesão and Miguel Torga; Raul Brandão, Pascoaes and Agustina are, in some way, the continuation of Camilo’s pessimism; Garrett leaves, desiccated, his impenitent humour completely

lost, a whole tone that from Júlio Dinis and António Nobre comes to flow into so much narrow-mindedly regionalist and depressing loa” [1].

In the author’s words, Porto is presented as a city “bathed in a melancholic baroque acidity, reflected by the waters of the river” [2], p. 149, showing his sensitivity to the city. António [7] states in his article on Eugénio de Andrade that the poet, when wandering around the city, resembles an artist, only with one difference: the poet has the ability to paint pictures with words. In fact, Eugénio de Andrade is delighted by the play of colours and lights that the city reflects throughout the day, as he himself says: “And when the sun, even when cooled, shines through the windows, the city’s thousand and one skylights, trapezes and belvederes fill the twilight with sparkles—Porto then looks like it was painted by Vieira da Silva: it’s more imaginary than real” [1, 4].

Eugénio describes the city in its unique combination of physical, human and social elements. As Oliveira [7] points out, the poet highlights “the negrilla trees of Cordoaria, the linden trees of the Palácio, the magnolias of S. Lázaro, the jacaranda and the glaucous cedar of Largo do Viriato [1] and also the seagulls of Cabedelo, the birds that entered his house and ended up entering his poetry, the peach tree and the loquat tree of Rua Duque de Palmela that knocked on his window pane inviting him to share his solitude, participate in his life as if they were members of his family”.

The power of poetry can, of course, be analysed from multiple angles, but in this work we will focus on the aspect related to the city of Porto and the daily life of its residents, perceiving the contrasts in the landscape and the ways in which its inhabitants appropriate the territory.

Our aim is to carry out a somewhat innovative exercise for the city, based on the poetry of Eugénio de Andrade. To this end, this work is based on the work *Porto os Sulcos do Olhar* which, as the title suggests, presents us with the writer’s view of the city of Porto, highlighting not only its physical and human landscape, but also the way in which the city involves us, through the writer’s creative message.

Porto, Os Sulcos Do Olhar: A Tour Through the City

Published in 1980, this work, which is part of the “Essays and other texts” section, includes photographs by Dario Gonçalves and watercolours by Júlio Resende that illustrate Eugénio’s text, whose source of inspiration is the city of Porto.

When referring to the poet, Eduardo Lourenço emphasised that “he is the privileged inhabitant of his own poetry” [3], so by designing the itinerary “Eugénio de Andrade, getting to know Porto through the poet’s words” we are sure to be able to offer the visitor/tourist a unique journey through the city, a true experience of the inhabitant of the territory.

In fact, our poet lived the city with such intensity that the whole text is centred around his journeys within the city, allowing us not only to get to know it, but also to feel the pulse of life within it. With him we hear the birds, “morning stubble of sparrows” [4], we see the trees “I am sometimes surprised, moved by a fig tree that drops branches into the street from the top of the old walls; or by some sunflowers that are in bloom in the neighbour’s yard; or, in a tiny garden, by some jacaranda trees that I didn’t even suspect existed two, three steps from my house (...) and in

fact they are there, in Campo 24 de Agosto”. Andrade [4] and we get to know the true soul of the city, which he considers to be its heart: “It is said, and I believe it, that it is in Ribeira that the heart of the town beats. Here you can still hear it beating as it did at the time of King João I, or his son Henry, who also travelled here to collect men, ships and money for his companies” [4], in an unparalleled urban arrangement, because in his words “everyone knows that in Porto, between the Cathedral and the Ribeira, the houses jostle each other like circus acrobats” [4].

Beyond places and their elements, squares, streets, buildings and gardens are not just places of reference, they are living organisms themselves. The poet brings the elements to life (in other words, gives them another life).

For the poet, even when the places are real and the objects represent the real, objective world, they provoke emotions in him and, therefore, he shares affections with these objects and establishes an emotional relationship with them, going so far as to give names to the trees he liked best, saying that “giving trees people’s names is not just an English thing” (*Os sulcos do olhar*, p. 44). Oliveira [7] points out that “Eugénio named a magnolia tree in the S. Lázaro garden after his mother (Maria dos Anjos) and the huge plane tree at the entrance to the garden after Walt Whitman”. The Literary Tourist Guide.

32.3 Methodology

The aim of this paper is to present a literary itinerary for the city of Porto, based on the contribution of Eugénio de Andrade’s poetry. Therefore, a bibliographical review was carried out centred on two fundamental concepts: literary tourism and literary itinerary, as well as the life and work of the writer Eugénio de Andrade. Regarding the writer, given that this year marks the centenary of his birth, we also carried out some fieldwork in terms of attending conferences and visiting the exhibitions open to the public this year, highlighting “Eugénio de Andrade—A arte dos versos”, an exhibition marking the author’s centenary and featuring unpublished documentation organised from the Eugénio de Andrade Foundation’s collection, and “Poesia a 100 Eugénio”, a painting exhibition made up of works from Eugénio de Andrade’s collection and other unpublished works inspired by the poet’s work and/or figure. Afterwards, we selected the work *Porto, os Sulcos do Olhar* and, based on it, we designed a proposal for a literary route through the city of Porto, which we developed in digital format, building a StoryMAP using the ArcGIS software.

32.4 Literary Route: *Eugénio de Andrade, Getting to Know Porto in the Poet's Words*

The proposal is simple: to travel through the city of Porto through the eyes of one of the leading contemporary writers—Eugénio de Andrade—and, at the same time, discover and experience the atmosphere, the landscape, the people, the colours, the gardens and the typical sounds of the city that inspired the cultural legacy he left us, while allowing visitors/tourists and even residents to create an imaginary of the locals' identity.

As an itinerary that aims to show visitors/tourists the city of Porto through Eugénio's eyes, the route we are presenting—Eugénio de Andrade, getting to know Porto in the words of the poet (Fig. 32.1)—is intended to guide a tour of the city in an east–west direction, in a route lasting approximately 6 h.

As this is a full-day programme that can be carried out independently, we have created a digital route in ArcGIS that visitors/tourists can access via the link: <https://arcg.is/4Kef0>, which will be made available to the various tourist agents. However, we believe that, in order to enhance the experience, this route could be organised by tourist guides. Participants will receive an information brochure with the route plan and, whenever there is an excerpt to be read along the way, the guide can give the opportunity to a participant who wants to do so. The route should start at around 9am, with breaks for lunch and morning and afternoon snacks, and should end when all the stages have been completed. It is also recommended that the itinerary be carried out in small groups in order to provide a unique and personalised experience. The guide can also suggest some gastronomic experiences at the planned breaks in the route, so that the tourist feels they are following a complete itinerary of authentic cultural experiences.

The visit begins at point A (Fig. 32.1), Rua Duque de Palmela, the author's first home when he moved to Porto in 1950 for professional reasons. The tour continues to Campo 24 de Agosto (point B), the square that owes its name to the Liberal Revolution of 24 August 1820, which took place in Porto, marking the end of the absolutist monarchy in Portugal. After touring the garden and reading the passage "...—I don't like cities. That's why I'm sometimes surprised, moved, by a fig tree that drops branches into the street from the top of the old walls; or by some sunflowers that are in bloom in a neighbour's yard; or, in a tiny garden, by some jacaranda trees that I didn't even know existed two or three steps from my house...". And in fact there they are, in Campo 24 de Agosto ..." [4]. We then went to the Public Library (point C). This is where the documents belonging to the largest religious and private libraries are archived, as well as collections of great value, including manuscripts and reserves, such as the collection of musical manuscripts, the Azevedo and Vitorino Ribeiro Funds, the collection of old maps and plans, collections of correspondence and manuscripts belonging to various writers and personalities, including Eugénio de Andrade and the so-called Autograph Museum, made up of the collections of various writers and artists, and the remarkable collection of periodicals.

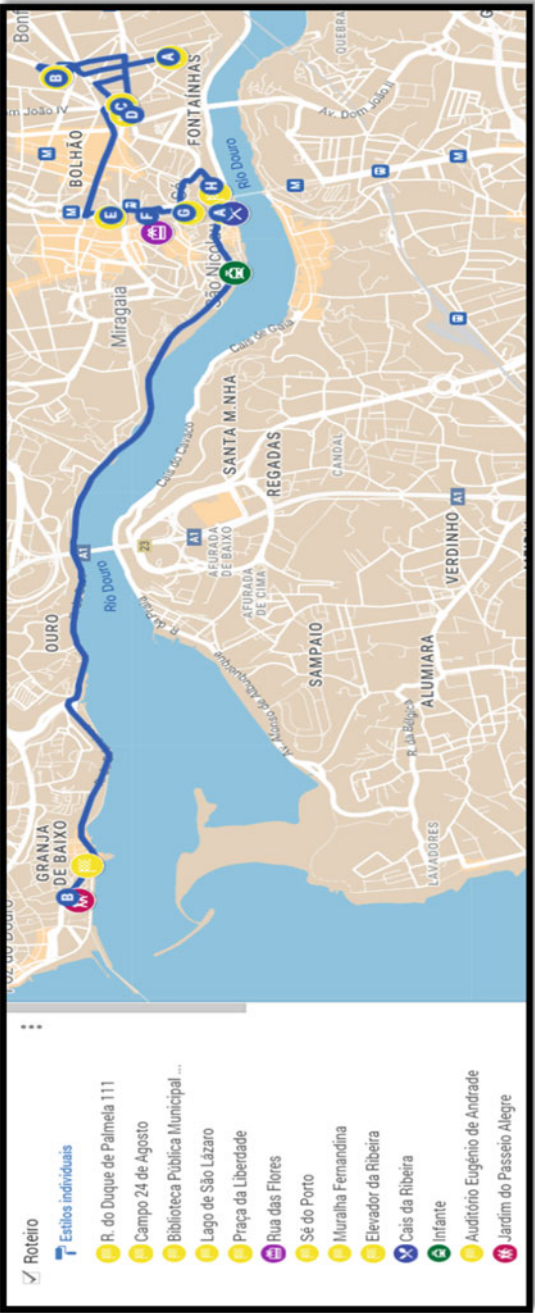


Fig. 32.1 Literary route: “Eugénio de Andrade, getting to know Porto in the poet’s words.”. Source Own elaboration

Opposite the Public Library is the Jardim de São Lázaro (point D). Inaugurated in 1834, this is the oldest public garden in the city of Porto. With its romantic layout, it enfolds us with the shade of its large magnolias and the colour of its camellias. It was designed by João José Gomes, Porto's first municipal gardener, and still has its original layout. The sculptures scattered around the garden, by artists such as Soares dos Reis and Henrique Moreira, stand out. Here we remember the excerpt: "Towards S. Lázaro, the streets are filled with silence. The footsteps of those returning home late are rare, even the lightest can be heard in the distance. In the middle of the night, the rustling of the garden has the clarity of a very young heart. Apart from the magnolias, there are no trees with leaves. The benches are deserted

- The little masons who warm themselves in the sun here at lunchtime must have fallen asleep in some corner of those houses in the process of being built, which are everywhere" [2].

"..... that huge plane tree, which at the entrance to the garden of S. Lázaro became more beautiful the older it got, he called it Walt, Walt Whitman, the poet" [4].

We head towards Batalha and then down Rua 31 de Janeiro to Praça da Liberdade. In the background, on the left-hand side, we find São Bento Station, completed at the beginning of the twentieth century and considered one of the most beautiful railway stations in the world. The walls of the atrium are covered with around 20,000 tiles by the ceramist and sculptor Jorge Colaço.

In Praça da Liberdade (point E), we highlight the equestrian statue of King Pedro IV, a ten-metre-high monument made of bronze in 1862. In the sculpture, the monarch shows the Constitutional Charter to the people. Here we can hear the poet say that "the city is often swept by a blind fog, only when you are very close to things you notice them. You passed Praça da Liberdade without even seeing the small magnolia tree covered in lunar whiteness. "Freedom deserved a square the size of a man's heart", says a friend of mine, measuring the square with heroic eyes from the days when he and other students opposed the police armed only with their own youth". A square the size of the world", I say as if echoing him, "if man isn't blind to those snowy petals" [4].

In front of São Bento station, we arrive at Rua das Flores (point F), about which Eugénio says that "it is a street worthy of Florence, this one, which in the sixteenth century was called, with some pomp, Rua de Santa Catarina das Flores; ..." [4].

After appreciating the emblematic façade of the Congregados Church, we head towards the Cathedral of Porto (point G).

A national monument, the Cathedral is one of the city's most beautiful monuments. Its construction began in the twelfth century and throughout history it has undergone a number of reconstructions, bringing together different styles. Mostly Baroque, the structure of the façade and the body of the church are Romanesque in style and the cloister and chapel of St John the Evangelist are Gothic. Inside, the large columns add to the feeling of altitude in the central nave. The decoration is very sober, and the walls are bare, except for the high altar and some Baroque-style chapels.

The cloister dates back to the fourteenth century and is decorated with tiles illustrating biblical passages. From the cloister you can enter the Chapter House, where the “cathedral treasure”, a collection of religious jewellery objects, is on display.

We then continue towards the Fernandina Wall (point H). Completed by King Ferdinand (from whom it took its name), it was built between 1368 and 1437 with funds from the wine tax and had a length of 3000 steps and an average height of 30 feet. It was garrisoned with battlements and reinforced by numerous cubicles and square towers. We are in one of the two sections, located next to Rua Arnaldo Gama, called Trecho dos Guindais. The other section is located next to the Escadas do Caminho Novo, called Trecho do Caminho Novo.

After appreciating the landscape and listening to Eugénio’s passage “I saw those walls crumble over the river—the waters of September were calm, and successive (...) I saw those Walls. They were thick, cold bronzes. They collapsed when I looked at them” [4] and we continue to the Guindais Lift, which takes us to Ribeira. This tour allows us to confirm the landscape so well described by the poet: “everyone knows that in Porto, between Sé and Ribeira, the houses jostle each other like circus acrobats” [4].

In Ribeira, where “the heart of the city of Porto beats”, according to Eugénio (1980, p. 60), “the great bridge over the river comes to meet you. Look at the water where the boats pass, dark, dense, rumoured with lilies or nocturnal birds” [4], p. 123.

There is no shortage of typical restaurants with traditional delicacies and dishes that are the motto for stopping for lunch in this unique place on the banks of the Douro and considered a World Heritage Site by UNESCO.

We then continue to the tram stop. The tram is a masterpiece of the city. Its history dates to 1872, when the first line of “American cars” opened in Porto. Line 1, which connects the historic centre to Foz, allows you to appreciate the unparalleled beauty, architecture and landscapes. On the other side of the river, you can see Cabedelo, “where the seagulls linger”.

Eugénio refers to this short trip by saying that “all the splendour on the way to Foz is a cat in the sun, or even less” [4]. The last stop is in front of the Eugénio de Andrade House and Foundation. Here we have the opportunity to get to know the author better and hear more of his story. The olive tree we see in front of the house is the most authentic portrait we can get of the author, as it was planted there as a gift for his 80th birthday, at his request. While he was recovering in hospital, he asked his friends to give him a present, which consisted of planting a plane tree, an olive tree or a weeping tree in the triangle of dark earth in front of his house on Passeio Alegre, and planting a hedge of sweet, musical white hawthorn flowers around it.

We end our journey with a walk to Foz while we enjoy the palm trees of Passeio Alegre, so well described in his books, and the almost hidden sunlight that reflects on the waters.

32.5 Final Considerations

In the introduction of this paper, we presented the premise that Eugénio de Andrade's literary work could be used to support a tourism initiative. The examples we have presented allow us to conclude that using this type of strategy is not only appropriate but can also be another opportunity to boost tourism activity, enhancing it in the eyes of the public.

In the particular case of *Porto, os sulcos do Olhar*, the city is presented in a way that allows us to (re)understand its physical heritage, the habits and customs of its inhabitants and necessarily the interaction between natural and human elements.

As a result, this proposal for a literary route provides an innovative, unique and unrepeatable tourist offer, since much of what is on offer will be the result of each visitor/tourist's own sensitivity to the poet's words.

This work contributes to reinventing tourism proposals and, territorially, contributes to Porto's more consistent commitment to literary tourism. It also represents a tribute to Eugénio de Andrade, for the fact that his writing allows us to retrace routes and access the heritage of a local community.

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Chapter 33

The Perception of Tourists Regarding the Importance of Influencers in Shaping the Image of a Tourist Destination: The Case of Melgaço (Portugal)



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Abstract In today's digital world, certain individuals possess the ability to convey a message to others, commonly known as influencers, with the power to inspire and influence their respective followers. This study aims to assess tourists' perception of the importance of influencers in shaping the image of a tourist destination, specifically in Melgaço, Portugal. The study seeks to understand the factors that motivated tourists' most recent visit to the Melgaço region, gauging the degree of influence exerted by influencers in the decision to visit and their impact on tourists' purchasing behavior in the region. Data were collected through an online questionnaire survey conducted between December 2021 and January 2022, and data analysis was carried out using SPSS software. The analysis compared three generations (X, Y, and Z) and revealed that the user-generated content (e-WOM) is not yielding the desired effects concerning the Melgaço region, neither in terms of motivation for visiting nor in the perception of the Discover Melgaço brand. These findings may justify a greater focus on digital marketing efforts and the role of influencers in the region.

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33.1 Introduction

We live in a digital world that is constantly evolving at a rapid pace. Nowadays, almost everyone is familiar with social media, even if they do not have exact knowledge of how to use it, with some individuals being more active in this medium than others. In this new world, referred to by [1] as the “digital ecosystem” due to the sheer volume of information available, choosing valuable information is not an easy task. Consequently, companies present themselves to the world through the eyes of individuals who possess the ability to convey a message to others—these are the so-called influencers whose primary purpose is to influence and inspire others [1], also known as digital opinion leaders—DOLs [2].

Opinion leaders inspire society through social media when it comes to consumer decision-making. Followers are enticed by the way of life, experiences, and knowledge gained from the referenced brands. They follow individuals with similar interests [3]. For this study, we unify all the concepts of DOL, opinion leaders, and bloggers and refer to them as influencers. Given the increasing relevance of influencers among their followers and the relationship that is created and expanded with each posted content, this theme assumes itself as a new niche to be explored for promoting a tourist destination [4].

This research aims to understand the concept of influence marketing and influencers themselves, seeking to comprehend how they directly impact the creation of the image of tourist destinations. The research focuses on Melgaço, a municipality located in northwest Portugal integrated into a protected area (Peneda-Gerês National Park). In this context, this study aims to provide practical insights into understanding the best practices for promoting tourism in protected areas using an important tool for the future economic development of the country. The research problem guiding this study is: What is the impact of influencers on shaping the destination’s image? A case study of the Discover Melgaço brand.

The intention is to understand the digital impact on tourism, reflect on influencers, and to what extent their influence affects the choice of a tourist destination. Furthermore, it aims to verify if this impact truly occurs in the promotion of the studied destination. Therefore, this article is structured in five parts. Initially, it provides a theoretical framework for the topic, followed by the methodology and the results obtained, and finally, the conclusions.

33.2 Literature Review

The development of e-commerce in tourism has sparked interest in online loyalty in this sector [5]. The promising long-term relationship between consumers encompasses marketing and management in tourism, noting that in e-commerce, consumers can switch websites with a single click [6]. Currently, consumers prefer to read

content that people share; their experiences are changing marketing, becoming a way to reach the target audience and wielding significant influence [7].

These individuals are known as Digital Opinion Leaders (DOLs), reaching a large number of people through various media channels. Nowadays, with the evolution of social networks, companies select these influencers to promote their brands to followers, often achieving better results than traditional advertising campaigns [2]. The study by [8] aids in understanding potential influencers from the perspective of online marketing and through the analysis of social networks (SNAs—Social Network Analyses). These significant actors have the potential to spread a message to society and influence consumer behavior, including e-word of mouth (e-WOM) communication. The identification of these actors and their selection are undeniable and open up new possibilities for a brand's relationship with its target audience [8, p. 347].

Consumers absorb product or experience references through e-WOM. Companies, aiming to monitor, control, and influence e-WOM content, support and create brand communities for their users [9]. However, given that e-WOM information is based on credibility, too much content provided by the company itself can create insecurity in consumers who may feel deceived [9]. Currently, this social media influence is a marketing tool that uses individuals to shape consumer perceptions of a brand or product [10].

The study by [12] identified differences between electronic and traditional WOMs. In the traditional sense, information is shared among people within a family or a familiar context, where one acquires information through similarity or knowledge of the other. In the digital world, due to the lack of familiarity, the spread of untrue e-WOM is high. Word of mouth in the digital realm spreads easily, exposing consumers to a greater amount of information about products [12]. The result of the multiplier effect of e-WOM dissemination is the reason celebrities or opinion leaders are involved in promoting a brand, “seeking an emotional or rational connection with a target audience” [7, p. 348].

According to [10], “When brands hire social media influencers, they have already made a name for themselves in a specific domain, so when influencers endorse brands related to their field of expertise, consumers can readily believe and accept the influencers’ opinion” (p. 504). [11] defends that the concept of an influencer involves “a content creator: someone who has expert status in a specific area, has cultivated a considerable number of engaged followers—of marketing value to brands—and regularly produces valuable content through social media” (p. 59).

Currently, online technologies have changed the way people access tourist information and structure their trips, playing a role in every stage of decision-making [13].

The analysis of social networks is a valid method for marketing and digital marketing, as it allows “the detection of prominent actors in a social network, with the advantage of being a simple but powerful method for visualizing, analyzing, and communicating findings” [7, p. 362]. According to [14], an influencer can persuade to the point where their followers reconsider their actions and agree with them, influencing their purchase intentions. It is thus an important marketing strategy for

companies focused on decision-making [14]. With the advancement of technologies, the capacity for interactivity has increased. Information is shared directly or indirectly by users in different places and various ways [15]. With this technological advancement, social networks have been leveraged for brand promotion and for individuals to exchange experiences and evaluations. These evaluations are relevant when it comes to decision-making [14]. Influencers share their opinions about products and services on social media, and all the consumers who follow them and subsequently share or comment on these opinions contribute to the product or service's marketing.

In tourism, the promotion of destinations takes place on social networks, primarily by influencers who increase their followers, targeting specific tourism products [16]. These influencers spread the message to users, broadly disseminating it through word of mouth, leading to new perspectives on the relationship between the brand and the target audience [7]. They are a tool used by companies to shape consumer perceptions of the brand [10].

33.3 Methodology

Given the study's objective, a quantitative methodology was adopted. Quantitative research involves the process of collecting and analyzing numerical type of data. This type of research is suitable when we want to find patterns and averages, make some predictions, and test causal relationships or compare groups. The quantitative research method can be chosen when a descriptive and exploratory study is conducted. Therefore, in this exploratory and descriptive study, an extensive review of studies, scientific articles, and books was carried out that supported the questions. The collection of data from tourists allowed the specification of the Melgaço region, disclosed by the current trend of influencers. Previously, a pre-test was applied with the purpose of evaluating the instrument developed.

In this investigation, a questionnaire was built using Google Forms survey tool and the questionnaires were distributed through a variety of online distribution channels, among which LinkedIn, Facebook, Instagram, and email. As it was an online survey, respondents were directed to access the questionnaire through these social media platforms. It was developed based on the literature review, aiming to collect information on the socio-demographic profile of the respondents, like personal data (age, gender, marital status, educational level), behavioral data (travel habits, following influencers, sharing travel experiences), as well as their stance on influencers when choosing a tourist destination [1–3, 10, 16–20].

The questionnaire consisted of 21 questions, although only a subset of them will be analyzed in the present chapter. Some questions used a Likert scale with a 5-point measurement, ranging from 1 (not influenced at all) to 5 (completely influenced), or in some cases, from 1 (strongly disagree) to 5 (strongly agree). The survey remained available for access by respondents and data collection from November 22, 2021, to January 31, 2022, with a total of 137 responses collected.

To analyze the questionnaire results, various statistical procedures were carried out using the Statistical Package for the Social Sciences (SPSS version 28):

1. In the initial step, before any other statistical analysis, univariate statistics were computed for all survey items.
2. In the second step, one-way ANOVA and Chi-squared tests were used to identify differences among the three generations of respondents (X, Y, and Z).

33.4 Results

33.4.1 Respondents Profile

Regarding socio-economic data, aiming to establish a positive relationship between the choice of a tourist destination and each of the profiles, it was found that out of the 137 respondents, the majority, 74 respondents, are female, representing 54% of the interviewees (Table 33.1).

Table 33.1 Socio-economic profile of respondent

		N	%			N	%
Age group	Under 18	18	13.1	Education level	Elementary school	08	5.8
	19–29 years	13	9.5		Upper School	26	19
	30–39 years	20	14.6		Post-secondary education	08	5.8
	40–49 years old	53	38.7		Bachelor's degree	60	43.8
	50–59 years old	23	16.8		Master's Degree	24	17.5
	60 years and over	10	7.3		PhD	11	8
Gender	Female	74	54	Income	Up to €700	29	21.2
	Male	62	45.3		From €701 to €1400	42	30.7
	Prefer not to say	01	0.7		From €1401 to €2100	31	22.6
Marital Status	Single	43	31.4		From €2101 to €2800	17	12.4
	Married/civil partnership	78	56.9		2801€ or more	18	13.1
	Divorced	14	10.2				
	Widowed	02	1.5				

However, for a better assessment of the results, considering that there is no uniformity in the literature regarding the chronological period of generations among authors, the age groups in this study will be divided into three groups:

- Group A—up to 29 years old—often referred to as digital natives, Generation Alpha, or Generation Z
- Group B—aged 30–49—commonly known as digital immigrants, Millennials, or Generation Y
- Group C—aged 50 or older—referred to as Boomers or Generation X.

In this way, it can be observed that the majority of respondents (53%) belong to Generation Y, and the majority are married or in a common-law marriage, representing 56.9%. Regarding education, 60 respondents (43.8%) hold a bachelor's degree, 18.98% have completed secondary education, and 17.52% have a master's degree, indicating a high level of academic qualifications among the respondents.

As for monthly gross income, the largest portion of respondents (30.66%) earns between €701 and €1400 per month. Additionally, there is an almost equal distribution with 22.63% falling into the income bracket of €1401–€2100 and 21.17% earning up to €700 per month.

33.4.2 Perception of the Importance of Influencers

Given that the objective of this study is to understand the respondents' opinions on the influence exerted by influencers on the purchasing behavior of tourists in the Melgaço region, closed-ended questions were used as a basis to obtain specific information straightforwardly, resulting in an easy and clear analysis. For the analyses, this study divided the age groups into Generations Z, Y, and X, as defined earlier.

Firstly, respondents were asked about what they understood by a digital influencer (Table 33.2). Generations Z, Y, and X all understand that an influencer is someone who shares their experiences on social media, demonstrating that social media consumers, regardless of age, engage with and relate to the shared content [1]. There were no statistically significant differences in the results among the respondents.

To understand the factors behind the motivation for the respondents' last visit to the Melgaço, they were asked if they had ever been influenced to visit a tourist destination by an influencer (Q1.6). Generations Y (53.4%) and X (45.5%) have been more influenced to visit a destination by an influencer (Q1.6), while Generation Z has only been influenced by 29% (Table 33.3). However, the results did not show statistically significant differences. This indicates that tourism influencers have not been able to gain loyal followers among younger consumers [6]. Generation Z seems to be influenced by other variables, lacking the trust placed by Generations Y and X, which already have a bond of trust [21], in the information shared when making a decision [16] to visit a tourist destination.

Table 33.2 Question Q1.1. What do you understand by a digital influencer?

	Z		Y		X		Total		X ²	Sig
	N (31)	% (22.6)	N (73)	% (53.3)	N (33)	% (24.1)	N (137)	% (100)		
A	11	35.5	19	26.0	6	18.2	36	26.3	2.475	0.290
B	21	67.7	55	75.3	23	69.7	99	72.3	0.770	0.680
C	12	38.7	39	53.4	19	57.6	70	51.1	2.616	0.270
D	14	45.2	43	58.9	18	54.5	75	54.7	1.659	0.436
E	10	32.3	17	23.3	3	9.1	30	21.9	5.193	0.075

A—Someone who indicates products/services they use; B—Someone who stands out by sharing their experiences on social media; C—Someone who shares their opinions and persuades their followers; D—Someone who can influence and even lead to a purchase behavior for a product/service; E—A business strategy for promoting a product/service

Table 33.3 Questions Q1.5–Q1.9 (in percentage)

	Z		Y		X		Total		F	Sig
	Agree ^a	Mean	Agree ^a	Mean	Agree ^a	Mean	Agree ^a	Mean		
Q1.5	90.4	4.61	97.3	4.81	97.0	4.73	95.6	4.74	1.196	0.306
Q1.6	29.0	2.77	53.4	3.37	45.5	3.03	45.9	3.15	2.131	0.123
Q1.7	32.3	3.26	50.7	3.38	36.4	3.30	43.0	3.34	0.200	0.819
	Interest. ^b	Mean	Interest. ^b	Mean	Interest. ^b	Mean	Interest. ^b	Mean	F	Sig
Q1.8	64.5	3.90	78.1	4.12	63.6	3.91	71.5	4.02	0.833	0.437
	Freq. ^c	Mean	Freq. ^c	Mean	Freq. ^c	Mean	Freq. ^c	Mean	F	Sig
Q1.9	32.3	2.87	23.3	2.42	21.2	2.61	24.8	2.57	1.191	0.307

Note ^a Percentage of respondents who chose agree (4) and strongly agree (5); ^b Percentage of respondents who chose interesting (4) and very interesting (5); ^c Percentage of respondents who chose frequent (4) and very frequent (5)

Q1.5. Advancement of technology, due to interactivity, has changed destination marketing strategies; **Q1.6.** Have you ever been influenced to visit a tourist destination by an influencer?; **Q1.7.** Level of trust in the opinions shared by an influencer on social media about tourist destinations; **Q1.8.** Do you find content that shares lived experiences as if telling a story appealing?; **Q1.9.** How often do you usually share your travels on social media?

Regarding the level of trust in the opinions shared by influencers about a tourist destination (Q1.7), the highest level of trust is in Generation Y, followed by Generation X (Table 33.3), but it is not possible to conclude that there is a significant difference.

It can be observed that trust and satisfaction contribute to consumer loyalty [6]. Brands should focus on customer satisfaction [22], building a bond with the consumer through trust, communication, and service [21]. Regarding finding content shared based on lived experiences presented as a story attractive (Q1.8), the majority of all three generations agree or strongly agree (Table 33.3).

Consumers on social media engage with content and become part of the shared story [1]. Everyone has an interest in what is happening in the world and what society is doing [19].

When asked about sharing their travels on social media (Q1.9), Generation Z tends to do it more frequently (32.3%), but all generations do it (Table 33.3), demonstrating that, in one way or another, they share their lived experiences in their travels through technology, sharing with the world and creating new experiences in a tourist destination [23]. To assess the perception of the Discover Melgão brand by tourists and their sources of contact with it, respondents were asked if online sharing of experiences can promote a brand of a tourist destination (Table 33.4). The results show a certain consensus among the generations that agree and strongly agree, with no significant differences.

The use of influencers in brand promotion was evaluated (Table 33.5), and the majority of respondents stated that influencers represent a marketing strategy.

The only aspect that showed statistically significant differences was the promotion of a seductive experience, which was more valued by Generation Z.

The responses from the three generations were quite similar, and they believe that in the tourism sector, a brand can differentiate the product to the point of influencing the choice of a tourist destination (Table 33.6), with the results not showing statistically significant differences.

Table 33.4 Question Q1.11. Online sharing of experiences promotes a destination brand

Z		Y		X		Total		F	Sig.
Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean		
77.4	4.32	91.7	4.45	78.8	4.21	85.4	4.36	0.940	0.393

Note ^a The percentage of respondents who chose agree (4) and strongly agree (5)

Table 33.5 Question Q1.12 Evaluate the use of influencers in brand promotion

	Z		Y		X		Total		F	Sig.
	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean		
A	58.1	3.71	65.8	3.74	60.6	3.70	62.8	3.72	0.024	0.977
B	80.6	4.29	79.4	4.25	69.7	4.00	77.4	4.20	1.160	0.317
C	83.9	4.26	69.9	3.92	66.7	3.85	72.2	3.98	2.022	0.136
D	74.2	4.03	46.6	3.51	51.5	3.48	54.0	3.62	3.754	0.026*
E	74.2	4.16	63.0	3.81	60.6	3.91	64.9	3.91	1.512	0.224

Note ^a Percentage of respondents who selected agree (4) and strongly agree (5)

A—It adds value to them; B—It is a marketing strategy; C—To give them an audience; D—Promotes a seductive experience; E—Leads to destination visits

Table 33.6 Question Q1.13: In the tourism sector, can a brand differentiate the product to the extent of influencing the choice of a tourist destination?

Z		Y		X		Total		F	Sig.
Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean		
80.6	4.16	89.0	4.25	84.8	4.12	86.1	4.20	0.293	0.746

Note ^a Percentage of respondents who selected agree (4) and strongly agree (5)

Generation Y followed by Generation X is the ones who are familiar with or have heard of the Discover Melgaço brand (Table 33.7), but it is not possible to conclude that there is a significant difference in the result.

Unfortunately, the number of tourists who were familiar with it fell far below expectations, which can be attributed to the data collection period. This is one of the limitations identified in the study.

To assess the perception of the Discover Melgaço brand by tourists and their contact sources, some images from the marketing campaign were presented, and respondents were asked about what was conveyed to them by these images (Q1.15). Only the willingness to visit the region showed statistically different values, with greater agreement from the older generations.

Table 33.7 Question Q1.14: Do you know or have you heard of the Discover Melgaço brand?

Z		Y		X		Total		X ²	Sig.
N (31)	% (22.6)	N (73)	% (53.3)	N (33)	% (24.1)	N (137)	% (100)		
7	22.6	33	45.2	12	36.4	52	38.0	4.777	0.092

Table 33.8 Question Q1.15: Do you believe that the following images from the Discover Melgaço brand convey?

	Z		Y		X		Total		F	Sig.
	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean		
A	54.8	3.68	56.2	3.60	45.4	3.24	53.2	3.53	1.254	0.289
B	90.3	4.35	86.3	4.40	90.9	4.52	88.3	4.42	0.396	0.674
C	61.3	3.68	69.9	3.93	78.8	4.12	70.0	3.92	1.445	0.239
D	83.9	4.19	85	4.37	84.9	4.30	84.6	4.31	0.610	0.545
E	54.9	3.55	75.4	4.05	75.8	4.06	70.8	3.94	3.421	0.036

Note ^a Percentage of respondents who selected agree (4) and strongly agree (5)

A—An image of an adventurous destination; B—An image of a nature-oriented destination; C—An idea of tranquility and relaxation; D—A positive image of the region; E—A desire to visit the region. Finally, through a Likert-type scale question (1—strongly disagree to 5—strongly agree), the impact of some factors on the decision to visit Melgaço was assessed (Table 33.9)

Table 33.9 Question Q2.1: What is the impact of the following aspects on your decision to visit Melgaço?

	Z		Y		X		Total		F	Sig.
Item	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean	Agree ^a (%)	Mean		
A	22.6	2.58	27.4	2.64	24.2	2.70	25.6	2.64	0.066	0.936
B	45.2	3.39	39.7	3.10	45.5	3.15	42.3	3.18	0.550	0.578
C	29.0	3.03	38.3	2.93	27.3	2.73	33.5	2.91	0.441	0.644
D	16.2	2.48	19.1	2.26	18.2	2.33	18.2	2.33	0.327	0.722
E	42.0	3.00	39.7	3.00	36.4	3.00	39.4	3.00	0.000	1.000
F	25.8	2.77	34.2	2.82	33.4	2.61	32.1	2.76	0.282	0.755
G	25.8	2.74	37.0	2.85	33.4	2.76	33.6	2.80	0.094	0.911
H	22.6	2.71	28.8	2.70	33.4	2.73	28.5	2.71	0.005	0.995
I	32.3	2.94	53.4	3.41	27.3	2.88	42.3	3.18	2.534	0.083
J	29.1	2.97	46.6	3.22	30.3	2.94	38.7	3.09	0.668	0.514
K	29.0	2.90	42.5	3.18	33.4	2.85	37.2	3.04	0.920	0.401
L	38.7	3.32	63.0	3.89	48.5	3.30	54.0	3.62	3.457	0.034

Note ^a Percentage of respondents who selected agree (4) and strongly agree (5)

A—Texts from influencers; B—Photos/images from influencers; C—Videos from influencers; D—*Live streaming from influencers*; E—Recommendations of points of interest from influencers; F—Recommendations of accommodations from influencers; G—Recommendations of dining options from influencers; H—Recommendations of tourist activities from influencers; I—Posts on the social media accounts of Melgaço Municipality; J—Information available on the website of Melgaço Municipality; K—Information published in tourism-related social media groups; L—Recommendations from friends and family

The results show similar levels of agreement among the three groups, with the least valued aspect being the live streaming of influencers. The recommendation of friends and family gathers a high level of agreement, especially for Generation Y, whose agreement level is statistically higher than the other groups. For Generation Y, the publication on Melgaço Municipality's social media is also important.

33.5 Conclusions

The Internet is undoubtedly the most important means of communication after the invention of the telephone. The value of the internet, from being a source of research to data collection, makes work faster and more efficient [24].

After the pandemic and the consequent slowdown in tourism, various brands had the opportunity to innovate and immerse themselves in the highest possible technological level, which became a solution for destinations [25].

We are in a digital world where some people have the power to inspire and influence others who end up becoming their followers.

The present study aimed to assess the perception of the importance of influencers in shaping the image of a tourist destination, more precisely the tourist destination of Melgaço-Peneda-Gerês National Park. It is also aimed to understand the factors that motivated the respondents' last visit to the Melgaço area and the degree of influence exerted by an influencer in their choice of visitation, as well as the power exerted over tourists' purchasing behavior in the region. For this purpose, an online survey was conducted, sent to respondents through social media, specifically Facebook, Instagram, and LinkedIn, and also distributed via email through a link to the Google Forms survey platform. The survey consisted of 21 questions divided into the research topic, the impact of influencers, and the respondent's profile.

According to the results, respondents from all three generations agreed that an influencer is someone who shares their experiences on social media, and the chosen criterion for being a good digital influencer is related to the quality of the content they share.

Influencers have emerged to create content in areas where they have expertise, producing digital content and changing brand marketing [11]. They have come to inspire consumer decision-making. They are digitally followed by people with similar interests [3]. The positive bond created by influencers with consumers [7, 21], regarding tourist destinations (Q1.4), for Generations X and Y, is achieved through the sharing of photos/images and text with information. The younger generation preferred the sharing of destination videos.

All three generations agreed that with the advancement of technology, there has been a change in the marketing strategies of tourist destinations (Q1.5), with greater interactivity [15]. This digital impact on businesses, as per the literature review, has compelled brands to change their marketing strategies [20], leaving outdated strategies behind to find their place in the media and interact with their target audience. This positive marketing, according to [26] in favor of society, creates value not only for the company but also for customers and everyone else [20].

Generations Y and X have been more influenced to visit a tourist destination by influencers (Q1.6). Generation Z does not place the same level of trust in opinions shared by tourist influencers about a destination (Q1.7) and tends to be influenced by other variables, lacking the trust placed by Generations Y and X, who already have a trust bond [21] due to the information shared when making a decision [16] regarding a visit to a tourist destination.

Most respondents find content shared through lived experiences, as if telling a story, attractive (Q1.8). Through the dynamism in sharing content, products/services, there is interaction with social media consumers, and they engage and feel included in this sharing and end up becoming part of that story [1].

All three generations engage in sharing on social media (Q1.9), with Generation Z doing so more frequently. Through technology, Generation Z shares new experiences in a tourist destination with the world [23]. Generation Z tends to use Instagram, while Generations Y and X prefer Facebook (Q1.10). All three generations agree that online sharing can promote a brand of a tourist destination (Q1.11).

Respondents agree that influencers are a marketing strategy (Q1.12), with Generation Z attracted to seductive experiences. In the tourism sector, all three generations believe that a brand can differentiate the product to the point of influencing the choice of a tourist destination (Q1.13). Experiences lived by the public are distributed online, stimulating the choice of a tourist destination or merely the imagination of the tourist [27]. The persuasion of the message is evaluated based on the quality of the argument, credibility, attractiveness, and perception of the source [14].

Most respondents are not familiar with or have not heard of the Discover Melgaço brand (Q1.14). However, when presented with images from the marketing campaign (Q1.15), the majority of respondents from Generations Y and X expressed a desire to visit the region.

Regarding the decision to visit Melgaço (Q2.1), the generations agree with recommendations from friends and family, especially Generation Y, which also values the publication on the social media accounts of Melgaço Municipality.

The results provide insight into the factors that motivated the visitation of a tourist destination. It can also be observed that influencers have persuasive arguments and, according to the respondents, have changed the marketing strategies of businesses. However, when asked if they have been influenced to visit a tourist destination, there was no agreement in the responses.

The entire structure of consumer travel planning is primarily done online [13], and in the decision-making process, marketing invests in an influencer as a strategy to persuade their followers in the intention to purchase [14].

The present study found that the e-WOM-generated content [28] is not having an effect on the Melgaço region, neither in terms of motivation to visit nor in the perception of the Discover Melgaço brand. This could be addressed more effectively to reach a larger number of consumers through influencers [10]. Despite the investment that the municipality of Melgaço has made in recent years in digital marketing, the results are still far below expectations, given the limited number of respondents who were familiar with the municipality and its brand. Nevertheless, we believe that the characteristics of this destination, focused on adventure and nature, are appealing to tourists who are heavy users of social media and new technologies, so the commitment to their use should continue.

As a limitation of this research, during the empirical study, due to the COVID-19 pandemic and the slow return of tourism, it was not possible to collect exclusive information from visitors to the municipality of Melgaço. This information would have been important to establish a tourist profile and even make a comparison between high and low seasons with the involvement of influencers in these visits. Such information could help the municipality plan strategies to attract more tourists and address the issue of seasonality.

Future research could explore other tourist destinations and/or destination brands.

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Chapter 34

Social Media and the Growth of E-commerce—Multiple Case Studies: MusaMakeup and CRU Ecoliving



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Abstract In today's digital age, social media (SM) have emerged as a powerful force, transforming communication and social interactions on a global scale. At the same time, the fast growth of electronic commerce (EC) has revolutionized the way organizations operate and how consumers participate in online transactions. The integration of SM with EC has created a dynamic scenario that presents new opportunities and challenges for organizations seeking to take advantage of digital platforms to grow and succeed. This article aims to explore and analyze the impact of SM on EC by examining the multifaceted relationship between the two domains. By conducting multiple case studies of two Portuguese companies, using qualitative methodology with document analysis and structured interviews, we delved into the various ways in which SM influences and impacts on the overall growth of EC. This study aims to reveal strategic implications for organizations, providing recommendations for taking advantage of SM to optimize EC performance. Through a multidisciplinary approach, combining marketing, communication, and technology strategies, this article contributes to the existing body of knowledge, promoting a deeper understanding of the transformative role of social media in promoting EC growth.

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34.1 Introduction

In recent years, SM have revolutionized the way we communicate, connect, and consume information. Online platforms have become an integral part of our daily lives, influencing the way we interact with friends, family, and brands. At the same time, the rise of EC has transformed the traditional business landscape, offering consumers convenient and affordable ways to shop online. As these two domains have evolved, the intersection of SM and EC has created new opportunities and challenges for companies looking to harness the power of digital connections.

Today, we live in an interconnected world, where SM have become integral platforms for communication, information sharing, and consumer engagement. The convenience and accessibility of these platforms have enabled consumers to discover new products, seek recommendations, and make purchasing decisions in an increasingly digitally centered way. Consequently, organizations have begun to take a proactive approach to harnessing the power of these networks to attract more, engage, and convert potential customers [7].

At the same time, we are experiencing the transformation and growth of EC, which has fundamentally changed the way we shop and conduct business transactions [5]. EC refers to the buying and selling of goods and services over the Internet, reducing the need for physical stores and allowing organizations to reach a much wider, global customer base [5]. Consumers now have convenience and accessibility when it comes to purchasing products and services. This change in consumer behavior has led organizations to adapt and adopt EC as a means of expanding their reach, increasing sales, and promoting customer loyalty.

The aim of this study is to shed light on the impact that SM can have on the growth of EC, focusing on two Portuguese organizations, MusaMakeup, and CRU Ecoliving, which operate in this sector. By investigating the interaction between these two domains, it is intended to provide information on the mechanisms through which SM influence the growth and success of EC ventures. Using a qualitative research approach to answer the research question “What is the impact of Social Media on the growth of E-commerce and how can it be used to boost business success?”, a study based on structured interviews and document analysis was carried out that delves into the dynamics between SM and EC, exploring the strategies, opportunities, and best practices found by the selected organizations. By uncovering mechanisms through which SM influences the growth of EC, this research aims to contribute to the growing body of knowledge in the field of digital communication and provide useful information for organizations navigating the evolving landscape of EC in the age of SM. The results of this study not only contribute to existing knowledge, but also provide practical implications for companies looking to improve their digital presence and drive EC growth in an increasingly competitive market.

34.2 Literature Review

The EC landscape has been completely changed by SM. They have transformed the way companies approach EC, from the way they market their products to the way they engage with customers and build their brand.

To put this into context, SM are online platforms that allow users to create and share content, such as text, images, and videos, with their network of followers or friends. These platforms often have features that allow users to interact with each other, such as comments, likes, and messages. Some popular examples include Facebook, Instagram, Twitter, TikTok and LinkedIn. SM have become an integral part of modern society, with billions of users around the world using it to stay connected with friends and family, share information, news and express themselves creatively. It has also become a working tool, essential for companies to reach and engage with customers, as well as to promote their products and services [8].

The EC appeared in 1995 in the United States of America, and this need arose for the creation of Business to Consumer businesses. It also arose due to the need to update electronic business, as it allowed for the possibility of all kinds of transactions. E-commerce is called electronic commerce as soon as a transaction is made digitally and online. It also consists of all the activities of a company, but always implies that there have been transactions, discriminating the area in which it operates or the market of the company that is carrying them out [6].

SM have thus made it possible to positively influence E-commerce, used as one of the main resources for companies' Marketing and Communication. Neil Patel [7] highlights the importance of social proof in driving E-commerce sales through SM. Social proof is the psychological phenomenon in which people are more likely to make a decision based on the actions and opinions of others. In the context of E-commerce, social proof can take many forms, examples such as customer reviews, SM likes and shares, among others. According to Patel [7], social proof is particularly important in the age of SM, where consumers are constantly bombarded with marketing messages and product recommendations. By taking advantage of social proof, EC companies can build trust with potential customers. Social proof can also be used to boost EC sales through SM by encouraging customer reviews and testimonials. When consumers see positive reviews from other people who have bought and used a product, they are more likely to feel confident about making a purchase themselves. EC companies can also use SM to showcase these reviews and testimonials, sharing them on their networks and website, to help build trust with potential customers.

One of the main reasons why SM has influenced E-commerce is through the rise of influencer marketing [4]. According to Holmes [4], SM influencers have become "the new celebrities," with their recommendations carrying significant weight among their followers. As a result, many EC companies are now partnering with digital influencers to promote their products and reach new audiences. Influencer marketing is a powerful way of leveraging social proof to drive sales. When an influencer recommends a product or brand, their followers are more likely to trust and be influenced

by their recommendation [6]. Platforms such as Instagram and YouTube have created a class of influencers—individuals with a large following who can promote products and services to their fans [1]. EC companies have increasingly turned to these influencers as a way of reaching new audiences and increasing sales, often offering them free products or financial compensation in exchange for promoting their products [1].

SM are now playing a more active role in companies, as they have started to be used as virtual shop windows. Platforms such as Instagram and Pinterest allow companies to showcase their products in a highly visual way, and users can click to buy directly from the platform. This has made it easier for companies to reach customers and boost sales through SM [4]. These platforms are increasingly being used to personalize the EC experience through the growth of social commerce. Platforms such as Facebook and Instagram have introduced new features that allow users to make purchases directly from the app, bypassing traditional E-commerce websites, thus creating new opportunities for companies to sell products [1]. By leveraging data on customer interests and preferences, companies can tailor their marketing messages and product recommendations to individual users. This helps to create a more engaging and personalized shopping experience, which can lead to greater customer loyalty and increased sales.

In order to be able to measure the success of this investment in SM, the importance of analyzing these platforms stands out. By tracking metrics such as engagement, number of clicks and conversion rates, companies can gain valuable insights into what is working (and what isn't) in their Social Media Marketing and E-commerce efforts. This allows companies to refine their strategies and optimize their campaigns for better results. As EC continues to grow, SM will play an increasingly important role in shaping its future [4].

SM can be a powerful tool for EC companies in many ways. One of the main benefits of SM for EC is the ability to reach new audiences and expand the customer base. Examples such as Facebook, Instagram, and Twitter have millions of users, and companies can use targeted advertising and other strategies to reach potential customers who might not otherwise have heard of that brand. SM can also be used to promote engagement and create a more personalized shopping experience for customers. EC companies can use SM to share product updates, promotions and other content that helps build a relationship with customers and keep them engaged with the brand. In addition, by collecting data on customer interests and preferences, companies can tailor their marketing messages and product recommendations to individual users, creating a more personalized and relevant shopping experience. Another key benefit, according to the authors, is the ability to facilitate social proof [2]. Like Patel [6], the authors point out that by encouraging customers to leave their opinions and share their experiences with a product or brand on SM, EC companies can build trust and credibility. SM can also be used as a customer service tool, allowing companies to respond quickly and effectively to customer questions and complaints. By providing timely and helpful support through SM, EC companies can create a positive customer experience that builds loyalty and leads to repeat business [2].

SM can also be considered a strong tool for building brand awareness and loyalty, with companies using these platforms to showcase their products and build a relationship with their followers. By sharing high-quality content, responding to customer questions and feedback, and engaging in conversations with the public, EC companies can build a strong and loyal customer base that is more likely to return to their store for future purchases. SM also has the capacity to drive engagement and build a community around a brand. By creating a strong presence on SM, companies can foster a sense of community among their followers, with customers sharing their experiences, offering feedback, and participating in discussions about the brand and its products. This kind of involvement can help build trust and credibility with customers, leading to repeat business and encouraging word-of-mouth referrals [5].

34.3 Methodology

The aim of this study is to identify the impact that SM can have on the growth of an E-commerce business, not only in terms of sales, but also in terms of brand visibility, positioning, and consumer confidence, and to show how we can make gains in an E-commerce organization by investing in good SM management, among other things.

A multiple case study was used because it allows for a comparison of results. The choice was also because it obtained more considerable and more convincing data, to be able to find patterns between the organizations analyzed. When it came to which organizations to contact, it was established that they had to be active on SM and have EC businesses. The organizations chosen for this study were MusaMakeup and CRU Ecoliving. They were selected based on their projects presented at events at the Porto Accounting and Business School, providing valuable first-hand knowledge and insights into their strategies.

MusaMakeup was the first to create a formula called “Creamy Glitter.” This organization is a well-known brand in Portugal, where makeup artists and makeup lovers, from the biggest influencers to the smallest ones, approve of the organization’s products. This brand now has a wider range of products including the original Creamy Glitters, Glitter Spray, Lip Glosses, and Glitter Pigments. Now, the organization is expanding, opening its first physical space soon. The organization’s focus and source of profit lies in online sales of products to the end consumer (B2C).

CRU Ecoliving is a brand of cork products focused on the sustainable children’s decoration segment. The idea came from a Portuguese entrepreneur who grew up in a family that worked with cork and decided to pass this passion on to her daughter. Beatriz Almeida, founder of CRU, identified a gap in the market within the children’s decoration sector in terms of sustainable and natural solutions, and took action to develop her idea. This brand is fairly new, having only been created in 2021. The organization is present on Facebook and Instagram and has its own website.

Bent Flyvbjerg [3] discusses the aims of a case study and argues that case study research can be used for a variety of purposes, including theory testing, theory building, and theory reformulation. A case study is a research method that involves

several strands, such as the detailed analysis of a particular case. The data collection chosen for this case study was document analysis and structured interviews. Document analysis is a key component of case study research and can involve a variety of materials, such as reports, memos, meeting minutes, financial statements, among others [9]. As for the interviews, they were organized into parts: The first part explained the objectives of the interview and the study and also clarified that all the information obtained would only be used for this study; the second part of the interviews, in terms of the script, consists of questions relevant to the study, structured and taking into account the interviewees; finally, the third and final part consists of final considerations and expectations for the future. These interview scripts help to assess various aspects related to the impact of SM on EC.

34.4 Results Analysis and Discussion

By examining the outputs provided by the two organizations under study, it was possible to obtain valuable information to draw comparisons and identify more effective approaches to making the most of SM for EC growth. The two organizations were compared based on various aspects, including feedback and customer relations, community, trust, visibility, strategies, sales, and content, and some interesting observations emerged.

In terms of feedback and customer relations, both organizations prioritize maintaining a close and interactive connection with their customer base. They understand the importance of responding promptly to customer questions and comments to ensure a high level of customer satisfaction. MusaMakeup emphasizes the value of informal and direct communication, easily answering customers' questions and making it easy for them to provide feedback. On the other hand, CRU also places significant emphasis on customer feedback, using it to improve its products and services, demonstrating a commitment to continuous improvement based on customer need.

When it comes to building a community, both organizations recognize the importance of creating a strong connection with their audience and understand the power of SM in cultivating a loyal and engaged customer base. MusaMakeup achieves this by harnessing influencers and focusing on fostering a sense of community around the brand. Similarly, CRU also understands the importance of building a community, with a strong focus on creating content that resonates with its target audience, fostering loyalty and brand advocacy.

Trust is a vital aspect of any successful business. MusaMakeup establishes trust by providing exceptional customer service, going above and beyond to ensure customer satisfaction. By treating every customer interaction with the utmost attention, a solid foundation of trust is created. CRU, on the other hand, builds trust by actively seeking customer feedback and incorporating it into its product development process, demonstrating a commitment to meeting customer expectations.

As for brand visibility, it plays a crucial role in the success of any business, and both organizations use SM as a resource to increase theirs. MusaMakeup invests in creating a strong organic presence and in influencers, cultivating proximity with its customers through regular content updates and interactions. CRU invests in targeted ads and campaigns, ensuring that their brand reaches the right audience. They understand the value of creating engaging content that captures the attention of their target market. By harnessing the power of SM, both organizations increase their visibility in the digital landscape.

In terms of strategy and sales, both organizations demonstrate a proactive approach. CRU invests in advertising and campaigns, with a special emphasis on seasonal events, offering attractive incentives to customers, such as free shipping. These initiatives have had a positive impact on their sales. Similarly, MusaMakeup focuses on investing in influencers targeting its specific audience, which results in increased sales and the acquisition of new customers. Both organizations understand the importance of aligning their strategies with the objectives of driving sales growth through SM channels.

Content creation is a fundamental aspect of marketing in SM. CRU tests different types of content to identify what has the most impact on your audience. Based on the feedback received during the testing phase, they refine their content strategy to maximize impact and conversion. MusaMakeup places great emphasis on creating both branded and user content, thus being able to adapt to the interests and preferences of its target audience—by creating engaging and relevant content, both organizations aim to captivate their audience and promote engagement.

Although there may be some differences in their specific approaches, both brands understand the importance of taking advantage of SM to increase the growth of their EC. They prioritize feedback, community building, trust, visibility, strategic planning, and the creation of impactful content. By implementing these strategies effectively, both organizations witness positive impacts on their sales, customer relations, and overall brand success.

34.5 Conclusions and Future Work

Throughout this study, we have witnessed the widespread influence of RS on CE, as it has revolutionized marketing, sales, and customer engagement. The seamless integration of RS into the CE program has facilitated direct interactions between organizations and their target audiences, allowing for greater brand visibility, personalized messaging, and real-time customer feedback.

By focusing on two Portuguese organizations operating in the sector, valuable information was obtained about their SR strategies, customer relations, and overall performance.

The analysis revealed several conclusions that shed light on the impact of SM on their growth. Both organizations recognize the indispensable role of SM in expanding their reach, connecting with their target customers, and increasing sales. They have

invested resources in developing comprehensive SM campaigns, taking advantage of various platforms to interact with their audiences. This proactive approach has led to greater brand visibility, better customer engagement, and a positive impact on sales growth.

Going forward, it is important to recognize the constant evolution of SM and Ec. Future studies can explore the emerging trends and technological advances shaping the landscape, such as the rise of influencer marketing, the integration of augmented reality and virtual reality experiences, and the impact of social commerce.

In conclusion, this research has demonstrated the profound impact of SM on the growth of any EC business, managing to answer the specific research objectives, verifying the influence of SM, the impact and involvement of SM in EC, exploring the challenges of using SM as a working tool and recommendations for other organizations. By harnessing the power of these platforms effectively, organizations can expand their brand presence, foster meaningful connections with customers and drive sales growth. By continuously exploring and adapting to the ever-changing digital landscape, organizations can capitalize on the immense opportunities offered by SM to boost their EC growth and thrive in the dynamic digital age.

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Chapter 35

Improving Accessibility as a Strategy for Social Sustainability in Tourism Supply



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Abstract Tourism is a citizens' right. Therefore, all of society has the right to enjoy tourism experiences regardless of individual preferences. The increase in the elderly population (+ 65 years), the high number of people with disabilities (physical, hearing, intellectual, and cognitive) in the world and the growing desire to travel, has accelerated the interest and concern for accessibility, to provide a better experience to these tourists, increasing practices and strategies under the “Accessible and Inclusive Tourism.” However, this tourism segment still has a long way to go, since many barriers persist. The present research aims to analyze accessibility in cultural heritage. For the collection and analysis of information, the qualitative method was selected, exploratory descriptive study, based on semi-structured interviews conducted with representatives of official entities, stakeholders, interpreter-guides, and associations of two medium-sized destinations in Northern Portugal (Braga and Guimarães), with the aim of assessing accessibility in the historical-cultural heritage in medium-sized cities of particular relevance. The city of Guimarães was distinguished as a World Heritage Site, being associated with the birth of Portugal as a nation, bringing an

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enormous relevance in terms of valorization and empowerment of its historical and cultural heritage by a segment that is increasingly more universal (accessible), having here the concern to evaluate urban policies in terms of accessibility to heritage and tourism destination. According to the typologies framed in Accessible Tourism, it is possible to highlight that, regarding the percentage of tourists with reduced mobility who visit tourism destinations, and, of these, which ones are interested in cultural heritage and what degree of satisfaction they express, the two tourism destinations analyzed do not account for this type of data, since it is a very residual public. Regarding other types of disabilities, some projects have been developed. Considering the definition of strategies to implement in the access to heritage, it is possible to evidence that, despite the improvements made by the destinations, the existing cultural heritage is not completely accessible, existing mainly architectural barriers. The results show that accessibility is being considered as a strategic opportunity for the targeted tourism destinations, however these are still partially accessible, and it is expected that the path to accessibility is a complex process and applicable in the medium to long term.

35.1 Introduction

One of the most important sectors for the economy of a country is tourism, since it generates employment, providing the development of destinations: creation of infrastructure, improvements in the transport network, and better provision of services. As stated by [1], every Human Being has the right to participate in it. “Accessibility is not a new concept” [2]. Throughout time, accessibility has been subject to several definitions, and there is no single concept. However, the different concepts that have been attributed to it over the past century are present in everyday life. The term “accessibility” is not a static term, it has undergone several changes: regarding quantification, local *versus* people measurement, and aggregation levels. However, this has been defined as a set of policy and/or urban-environmental changes, i.e., accessibility is a “specific, pre-defined agenda for reforming the physical environment” [3].

According to [2], accessibility is the greater ease of attaining services, goods, destinations, and activities, which are referred to as opportunities, and from the perspective of [2] “despite their possible disabilities or impairments.” Accessibility encompasses Universal Design, thus having a variety of services and products that help combat the needs of individuals [2]. According to the European Concept of Accessibility, this is a characteristic that exists in a certain place and that allows the existence of a harmonious relationship between that place and the Human Being [4]. In the perspective of [5], accessibility indexes consist of two functions: attraction (provides the quality and scope of opportunities that can be achieved with goods and facilities in places) and resistance (consists of “making it difficult to move to those goods and facilities”). By using these two rates, they allow weighing between

opportunities and activities and ease of being reached with respect to travel time and transport costs [5].

This research aims, through a qualitative methodology, to discuss the relevance of the applicability of accessibility and inclusion strategies for tourists in two medium-sized cities, relevant in the Northern Region of Portugal. The main themes of accessibility, inclusion, and the legislative framework for this segment are addressed, and, the methodology used, the main results, and conclusions of the research are presented.

35.2 Literature Review

In order to make the environment more accessible, Universal Design is one of the most well-known approaches/options [4]. Its main goal is to create products, services, and environments accessible to all, i.e., that all human beings, regardless of their needs, can enjoy them without the need for adaptation [4, 6, 7], always trying to simplify life for everyone [8]. The concept of Universal Design encompasses all people of all ages, abilities, and needs [8]. In today's world, developing accessible infrastructure is an icon of modernity [6]. However, according to [9], Universal Design needs a transdisciplinary approach since it requires strong cooperation between the various professionals from different areas. To carry out the planning, design, and implementation of accessible actions, it is necessary the full availability of the various actors so that there is interaction between the different entities, users, and participants. Objectives, concepts, and strategies need to be better defined, always considering the several views of the stakeholders. National, regional, and local governments and institutions in the European Union have started to consider the Universal Design approach as a key factor for the social inclusion of people with special needs, thus starting urban renewal, making infrastructures more accessible [9]. Universal Design includes seven principles. These principles provide general guidelines for assessing individual indicators of accessibility and also serve as a basis for better understanding the extent to which services, products, and environments are accessible to all [4, 10]. Universal Design principles create economic improvements for both operators and tourism destinations, generating sustainable outcomes for both people with needs and the rest of the population, as they recognize the consequences of disability and aging [8, 11]. According to [12], social sustainability happens when formal and informal systems, structures, processes, and relationships actively contribute to the creation of healthy communities. "Socially sustainable communities are equitable, diverse, connected, democratic, and provide a good quality of life" [8].

As with any type of disability, people with reduced mobility encounter several barriers in their daily lives, preventing them from "living the experiences of life" in a similar way to people without disabilities. These barriers can be physical (sidewalks, means of transport, infrastructures without accessibility, among others), social (attitudes—discrimination, exclusion of people in social activities) and communication (difficulty in providing and obtaining information) [13].

People with reduced mobility can be divided into three groups depending on their degree of disability. In relation to the tourism industry, people who are in the moderate and severe categories behave differently from those in the mild category. The more severe the degree of disability, the more important environmental factors and accessibility become. They seek quieter destinations that allow them to be more independent and have easier access to activities. Travel agents have to take into consideration that people with moderate or severe disabilities, when traveling, always have a companion or family member [14].

“Among the motivations for traveling, those of being in a natural environment and doing outdoor activities are considered important driving factors for people with reduced mobility” [15, 16]. People with mobility disabilities can be a market segment that boosts the profit of the tourism industry if it is well positioned, since these consumers, even not being wealthy, have resources that allow them to travel more often during the year (holidays, family visits, and medical care). Destinations have to market their services and products to this tourist segment, since this type of tourist is very loyal to destinations that meet their needs, i.e., destinations where ramps are included, accessible facilities (rooms, bathrooms, elevators, among others), but also the training of employees, so that they know how to act when they come into contact with a person with disabilities, always anticipating their needs [14]. Marketing strategies should be designed and implemented considering people with disabilities [14].

These tourists still face some barriers while traveling. Several authors have addressed this topic indicating some barriers and solutions. [17] refers that the main complaints are the absence of elevators, ramps without barriers, and in airport services they highlight the long distance between parking spaces and terminals. [18] presents several suggestions that can help increase the accessibility of hotel establishments and services for people with motor disabilities. Some of the special needs are life-long, i.e., permanent, but there are others that are temporary, such as a broken leg or recovery from surgery [19, 20]. The World Health Organization (WHO) (2015) [21] defines disability as a broad concept, since it encompasses impairments (problem in the body or structure), participation restrictions (problems encountered by the individual when participating in situations in daily life) and limitations in activities (difficulties encountered when performing an activity). [22], say that the term “disability” is a term that covers various types of impairment, limitations, and restrictions on participation in various activities of daily living. Defining “disability” accurately is a difficult process, because there are many conditions in it [23]. Several authors, regarding the tourism sector, state that heterogeneity is in the main motivations of tourists with and without disabilities and that it can be found in the main disability groups: hearing, physical, visual, intellectual, and cognitive [15]. In 2016, the World Health Organization declared that disability is not just a health problem, but something complex that involves the complex connection between the characteristics of the person’s body and the characteristics of the society in which it fits. To be able to overcome the difficulties of people with disabilities, there is a need to remove social and environmental barriers [19].

Anyone, at any point in their life, may have some type of disability (temporary or permanent), preventing them from participating in various activities, environments, and circumstances [24]. Any type of disability affects people's "concept of life," leading to an obvious need for adaptation. Disability leads to a decrease in the person's autonomy, causing a social disadvantage (locomotion, communication, work, orientation in space and time, personal hygiene, among others) [1]. However, like any other individual, people with disabilities are also entitled to enjoy social equality and civil rights [1, 25].

Several authors throughout the ages have approached the subject of disability. According to [26], the expression "people with special needs" should not be used, since it covers all people who need special care, such as pregnant women. [27] says it is necessary to be careful with the expressions used, in order not to create stereotypes, prejudice, and stigmas, i.e., the expression "people with disabilities" is not correct. In this same line of thought, [11, 24] emphasize that language control is very important in order not to particularize the concept of disability or disabilities.

Over time, several models that define disability have been created: medical, social, biopsychosocial, geographic, and economic. Each Disability Model was based on different paradigms, which influenced the actions related to accessibility in infrastructures, public spaces, and tourism services, since the existing offer comes from how service providers understand disability [21]. The most addressed models are the medical and social models, which are presented as opposing concepts [21, 28]. However, with the increase in tourism supply and travel, different approaches to lived experiences will develop, such as the biopsychosocial, geographic, and economic models [21].

There are several types of barriers, these being: physical, technical, social, economic, and lack of information [6, 29]. These barriers affect many social groups: the elderly, people with disabilities (permanent or temporary), families with young children, people at risk of social exclusion (e.g., immigrants) [6]. This is in line with the perspective of [30] who reiterates that "lack of accessibility creates social inequality."

According to [31], there are three types of barriers to participation in tourism activities: Environmental (social space attitudes, architectural, and ecological factors); Interactive (skills inconsistency and communication barriers); Intrinsic (associated with the person's physical, psychological, and/or cognitive condition).

However, other authors [23, 32–34] characterize these barriers as Structural (physical and material); Interpersonal (attitudes); and Intrapersonal (psychological and characterized by disability). Intrapersonal or intrinsic barriers are defined as the biggest problem to participation in tourism activity and social barriers as the most negative [23]. When people with disabilities overcome all existing barriers, they want and desire the same experiences as other people without disabilities, asking for similar services and products [23]. Several authors developed multiple research projects concerning the barriers that exist in the tourism industry. According to Loredana et al. [35] in tourism the main barriers are divided into two topics: environment and social barriers. Regarding the environment are activities in tourism destinations, communications, infrastructure, and transport, planning and reservations. In social

barriers: attitudes, low level of awareness of accessibility and low level of special qualification for Accessible Tourism [35]. According to [6], technical and information barriers are the main barriers that hinder the accessibility of the tourism environment, especially for people with disabilities and the elderly. According to the perspective of the United Nations [36], the obstacles encountered by people with disabilities while traveling include untrained professionals, websites and reservation services without accessibility, lack of accessible and inclusive airports, inaccessible services, and infrastructure (restaurants, hotels, tourism attractions).

As previously mentioned, the number of people with special needs has been increasing due to several factors: aging population, increased average life expectancy, increase in chronic diseases, and low infant mortality rate [1, 24, 37]. According to [36], in the European Union (EU) people with disabilities and elderly people (+65 years) represent 15% of the population. Taking this framework into consideration, the tourism industry must react with strategies suitable for this important target audience. Also, for [38], this type of tourist has been increasing, and in most cases, these people travel with others who also enjoy tourism services, which cause an increase in economic growth because of increased demand. The decision-making process in the choice of destinations and tourism products, of this type of tourist, is very different from that of a non-disabled tourist [29].

As in any field, in tourism, there needs to be inclusive language so that people with special needs have access to the same opportunities and benefits as people without special needs [39]. As previously stated, outdated terms can cause negative and inappropriate stereotypes, feelings, and/or attitudes [39]. Thus, the National Disability Authority [39] advocates that “Person-First Language” should be adopted when writing/talking about people with disabilities with the goal of representing the “individuality, equality, or dignity” of these people. Terms such as “wheelchair,” “disabled,” and “cripple” are no longer in use, having been replaced by “people with disabilities” or “people who use a wheelchair.” “Person-First Language emphasizes the person, not the disability, and fosters positive attitudes toward people with disabilities” [39]. People with disabilities need to be heard when planning accessible development. They not only need to be a dialogue partner, but they also need to have an influence on destination governance strategies and decision-making. Based on that strategy, we will be developing and promoting a sustainable approach. For destinations, listening to the experiences already made by this type of tourists will help in the process of planning and serving this segment [30].

According to [40], in defining inclusive tourism there are seven different elements that form the lines of inquiry. These elements can inform the limitations and potential of tourism with the goal of generating socioeconomic impacts with more sustainable and equitable outcomes. The first element refers to disadvantaged people as producers of tourism, overcoming existing barriers; the second element, disadvantaged people as consumers of the tourism sector, overcoming existing barriers; the third element, self-representation in an appropriate and dignified way, so that they can tell their story and culture; the fourth element, power relations within and outside tourism; the fifth element, greater participation in decision-making in the tourism sector; the sixth element, change in the tourism sector with the aim of providing more opportunities

and involving more people; finally, the seventh element, promoting understanding and mutual respect. The application of these seven elements allows us to assess the degree of inclusion of the destination.

Part of the world population that intends to travel has some kind of disability (motor, cognitive, visual, or hearing), and the tourism industry realizing the potential of new technologies has introduced them as a valence for the activity [41, 42]. With the development of digital platforms, such as applications, websites about destinations and social networks, a wider range of opportunities has been opened, since it allows people with disabilities to know right away if the destination/activity is or is not accessible to their characteristics [42]. New Technologies, Internet, and Marketing are crucial for the participation of people with disabilities in the tourism industry, as it is from these valences that the first contact is made when looking for information about the destination and/or activities, from planning or even during the trip [43]. One of the marketing strategies for capturing the target audience's attention is the use of appealing images. An image can influence people's opinions, motivate participation in new activities, change mindsets, and increase willingness to travel, including people with disabilities [43].

Local, regional and national development and tourism strategies (supported by political and economic agendas), over time, have increasingly produced on the heritage agenda: "how to use and sell heritage to national and international tourists, how to strengthen the positive image of the country and how to increase revenues" [44]. Heritage is divided into two groups: tangible and intangible. In cultural tourism, heritage includes both tangible and intangible elements [45].

With the increase in the aging population and the large number of people with some kind of disability, the Convention on the Rights of Persons with Disabilities [46] stated that it is important for any human being to participate in social life, and there is a need to reflect on accessibility in the various cultural spaces, emphasizing as a key point the principle of cultural accessibility. Article 30 refers to "Participation in cultural life, recreation, leisure and sport," and this article states that the signatory states recognize the right of people with disabilities to participate in all cultural activity and that they may have access to theaters, monuments, museums, among others, just like any non-disabled person [46]. The UN Convention considers the individual characteristics that each person with disabilities has as it relates to the environmental barriers, they may encounter that may limit them in participating in cultural life. Cultural heritage, art galleries and museums, have a high interest in the use of accessibility strategies with the aim of improving participation for all. Previously, studies were developed around the factors that should be considered when developing and building accessible environments for people with disabilities, mainly for motor and sensory impairments. However, over the years, research has focused on recognizing accessibility and expanding it across the various dimensions [46].

On July 13, 2021, the ISO Standard 21,902:2021—Tourism and related services—Tourism accessible to all was published. This standard aims to establish the requirements and provide guidelines for Accessible Tourism for all, with the main objective of ensuring access and enjoyment of tourism for all people, regardless of their

limitations and abilities. The document provides information on strategies, policies, products, and services and infrastructure and is aimed at all stakeholders, both for the public and private sectors (ISO 21902:2021, 2021).

The city of Braga, being the largest city in the Minho region in Northern Portugal, is considered the oldest city in the country and one of the oldest Christian cities in the world. It is located in the northern region of Portugal [47]. It has also been considered as one of the youngest and most entrepreneurial cities in Portugal. It was nominated in 2012 as the European Youth Capital and in 2016 as the Ibero-American Youth Capital and distinguished as Best European Destination in 2021.

The city of Guimarães is associated with the birth of Portugal, being considered the “Birthplace City,” since, around 1109, the first king of Portugal, D. Afonso Henriques, was born there [48, 49]. Guimarães is a medium-sized city located in Northern Portugal [50], a tourism destination with a wide cultural and heritage wealth, featuring traditional infrastructures between the fifteenth and nineteenth centuries [49, 50].

This study is presented as a descriptive exploratory study and uses a qualitative methodology. It is an analysis of accessibility in historical and cultural heritage in medium-sized cities, more specifically in Braga and Guimarães. “Qualitative research is a well-established approach to investigating phenomena in the social sciences” [51]. Since the first decades of the twenty-first century, qualitative methodology has gained more acceptance, as this method can provide rich, in-depth knowledge by pertinently presenting and debating viewpoints regarding the investigated topic [51, 52].

35.3 Methodology

This study presents itself as a descriptive exploratory study and uses a qualitative methodology. It is an analysis of the accessibility of cultural-historical heritage in medium-sized cities, the cities of Braga and Guimarães, located in the Northern Region of Portugal.

To answer the question previously presented, it is necessary to define a general objective, and eventually its division into specific objectives [53]. Therefore, the study aims to analyze the accessibility of cultural-historical heritage in medium-sized cities, more specifically in Braga and Guimarães. In the literature review, the analysis regarding the accessibility in cultural heritage in the cities of Braga and Guimarães is addressed and demonstrated (Table 35.1).

From this perspective, and prior to the application of the interview, participants were asked to fill in socio-demographic data. In addition, the questions were divided into the various specific objectives established and were also based on the literature review, as given in Table 35.2.

This study was electronically disclosed directly to the target audience, seeking the participation of the various actors who were able to conduct the interview. The participants were explained the objective of this study and its purpose and were asked

Table 35.1 General and specific objectives

General objective	Assessing accessibility in historical and cultural heritage in medium-sized cities
Specific objective	Evaluate urban policies in terms of accessibility to heritage and tourism destination

Table 35.2 Theoretical background of the interview

Question	Interview questions	Theoretical foundation
<i>Objective 1: Evaluate urban policies in terms of accessibility to heritage and tourism destination</i>		
Q1	What do you understand by Accessible Tourism?	[8, 54–57]
Q2	Can the aspects associated with accessibility be seen as opportunities for tourism destinations? Why?	[59–71]
Q3	According to ISO Standard 21902: 2021, do you consider that the tourism destination (Braga/Guimarães) is an accessible destination?	ISO 21902: 2021, 2021
Q4	According to the projects developed at the tourism level in the city of Braga/Guimarães, is accessibility being considered? If not, what could be improved?	Authors

to schedule the interviews. These took place during the months of July, August, and September 2022 and were conducted in person, in writing or by video call. This research considers theoretical saturation, i.e., from a given moment, when the interviews were conducted, there will be no more information to add on the theme, and at that moment they were concluded (Table 35.3).

Table 35.3 Interviews

Interviewed organization	Date	Duration
Braga Cathedral's Treasure-Museum	06.7.2022	In writing
Braga City Hall	08.7.2022	In writing
D. Diogo Sousa Museum of Archeology Diogo de Sousa	11.7.2022	00:20:06
Biscainhos Museum	14.7.2022	00:22:15
Dukes of Bragança Palace	18.7.2022	00:18:30
Guimarães Castle	18.7.2022	00:27:08
Alberto Sampaio Museum	20.7.2022	00:33:37
Regional Directorate of Culture of the North	02.8.2022	00:35:46
Certified Guiding Interpreter	29.8.2022	00:45:03
Monastery of São Martinho de Tibães	31.8.2022	In writing
Certified Guiding Interpreter	05.09.2022	00:22:55
Certified Guiding Interpreter	17.09.2022	00:23:03
CERCI Braga	21.09.2022	00:20:56

After conducting the interviews, the next step consists of analyzing and interpreting the data collected, in three phases. In the first phase, the synthesis of information, i.e., the selection of the elements collected during the interviews carried out through annotations and transcriptions [71]. Since the data collection was done through interviews, their transcription was carried out to identify the important content for the research. However, the researcher using qualitative methodology needs to create formats for displaying the data [71]. In this sense, a document was created considering the questions defined in the interview, from which the data were collected.

35.4 Results

The final objective of the data analysis is to evaluate the accessibility of cultural-historical heritage in medium-sized cities, specifically in Braga and Guimarães. The analysis of the collected data will be carried out through content analysis.

35.4.1 *Urban Policies in Terms of Accessibility to Heritage and Tourism Destination*

Regarding urban policies, in terms of accessibility to heritage and tourism destination, there will be an analysis regarding the definition of Accessible Tourism, accessibility: whether it is seen as an opportunity and whether it is being considered in tourism destinations and, finally, whether the destinations under analysis are accessible.

35.4.1.1 Braga

a. Definition of Accessible Tourism

According to the interviewees, Accessible Tourism is an *integrative* type of *tourism* (I.4), *which involves equality processes* (I.2), *being designed for everyone* (I.9), giving people the possibility to enjoy tourism services *independently with equity and dignity* (I.2), *allowing access to the most varied heritage enjoyment experiences (cultural, gastronomic, natural, among others)* (I.10).

b. Accessibility as an Opportunity for Tourism Destinations

There is agreement on the fact that accessibility is seen as an opportunity for tourism destinations, since it is a *factor conducive to personal development* (I.3) and employability, giving the possibility of expanding the target audience. Tourism destinations, when implementing accessibility in their services, try to develop *a set of infrastructure improvements with equipment, means of communication and marketing that*

make it possible to make known the mission, vision, and objectives, with the purpose of welcoming everyone with quality (I.10).

“European studies point out that in the year 2025 the majority of the population will be people between 40 and 60 years old, which will translate into a movement of more than 2000 million international trips. Therefore, Accessible Tourism and the aging population will be strong growth points” (I.2). “Accessible Tourism generates billions of euros per year, represents 3–4% of the EU’s gross income, i.e., it is a winning strategy, not only financially, but also in terms of employability” (I.9). “When we talk about accessibility we are talking about the elimination of physical barriers” (I.8).

c. **According to ISO Standard 21902: 2021, Tourism Destinations Are Accessible**

When implementing ISO Standard 21902: 2021, it is possible to verify that, according to the interviewees, Braga tourism destination has made efforts to become more accessible, being a *welcoming and integrating city* (I.5), however it is *partially accessible* (I.10). Some of the projects developed in the city of Braga to make it more accessible were: *ramps; streets with regular sidewalks that become easily accessible; lowered and leveled crosswalks; the existence of some illuminated, tactile and sound signaling; improvement and rehabilitation interventions in some museums in order to improve accessibility* (I.2/I.8/I.9), such as the Museum of Biscainhos where an elevator is being installed. The more recently built museums, such as the Museum of Archeology D. Diogo de Sousa, already have accessibility elements. Besides museums and monuments, Braga organizes every year great events, such as the *Roman Braga, the White Night, or the Ouvidoria Festival, which are free events, with the programming aimed at many kinds of public* (I.10), including people with disabilities.

d. **Accessibility to Be Considered**

As mentioned before, Braga cannot be said to be a completely accessible destination, because there is a *lack of coordinated national policy (planning, thinking and action)* (I.3) at the level of heritage with accessibility, which allows the permanence of barriers: physical, economic, and social accessibility. Thus, it would be important to make some improvements in the *creation and development of adapted public toilets, development of audio-guides and creation of places to pick up and drop off passengers* (I.3/I.8).

“We still think a lot about physical accessibility, but it is not only this one that is in question” (I.8). “From the point of view of intellectual accessibility there is still a long way to go, especially in people with special needs, in cultural elements. On the part of the employees there is a will, but without a policy, the capacity of the heritage in relation to accessibility is reduced” (I.4).

“In 2004 a city itinerary was created in “*braille*.” The tourism information office has developed portable contents—the “*Go More*” project—that allows the visitor to tour and learn everything he wants and be able to enjoy the existing cultural and

natural resources. Four Baroque itineraries adapted to people with reduced mobility were created” (I.9).

“Accessibility, which is intended to be addressed here, concerns not only physical accessibility, but any specific characteristic that tourists may have: temporary disability (accident victims, parents with infants and/or young children, advanced stage of pregnancy); permanent or long-term disabilities (motor, sensory, or intellectual disabilities); seniors; people with abnormal stature; or people with chronic illnesses; and, accessible social conditions” (I.10).

35.4.1.2 Guimarães

a. Definition of Accessible Tourism

According to the participants, Accessible Tourism is a *type of tourism or tourist activity that is prepared to receive all kinds of tourists with the most varied limitations* (I.8), being *accessible physically, emotionally, and visually* (I.5), and the services must be *adapted or suitable for all types of visitors* (I.9), but there are *still many gaps* (I.11).

b. Accessibility as an Opportunity for Tourism Destinations

According to the interviewees’ opinion, accessibility can be seen as an opportunity for tourism destinations, given the higher *demand in this type of market* (I.11). *It is everyone’s job to make the destination accessible by solving accessibility problems* (I.7).

“Tourism cannot ignore this kind of public. Communicational accessibility and intellectual accessibility are less addressed, unlike physical accessibility which is considered almost as a precondition for all the work that will be developed in the future. In museums there is a greater concern for the way they communicate, so that they are accessible to all people, regardless of their limitations/cognitive conditions” (I.8).

“The better prepared destinations are able to gain more from this since they attract more of this type of customer” (I.11).

c. According to ISO Standard 21902: 2021, Tourism Destinations Are Accessible

Regarding Guimarães, the interviewees stated that the city is an accessible destination, and that there have been improvements. However, it *depends on the place that is visited* (I.6), being considered *partially accessible* (I.11). One of the main causes for non-adaptation in some monuments and museums is the destruction of space, the “loss of essence,” as for example in Guimarães Castle, because *by building a structure you are destroying the space* (I.7). The city of Guimarães has received the label “Tur4All” (I.9) (“Accessible Portugal” developed a national project, with the support of some organizations associated with the sector (Turismo de Portugal, IP), which aims to provide information about the Accessible Tourism offer existing in

the country), being a *relatively flat city, allowing feasibly make your route on foot for those with reduced mobility or conditioned* (I.9). Some of the city's museums and monuments already have some improvements regarding accessibility, such as the *Paço dos Duques de Bragança*, where *an elevator and ramps were installed* (I.5) so that people with reduced mobility can visit it in a safer and more dignified way. Regarding public sector buildings, these, having the *largest share of responsibility in terms of urban policies and urban space* (I.8), have emphasized accessibility, since they are more recently built infrastructures.

"Heritage and culture often find it difficult to overcome barriers. In terms of infrastructure, you often can't do everything you would like to do and so you're not in an ideal situation yet. It's a long-term process" (I.11).

d. Accessibility to Be Considered

There are still some barriers since *ISO Standard 21902: 2021 is not fully applicable* (I.8). As in the city of Braga, *Guimarães lacks adapted public toilets and local businesses do not have wheelchair access* (I.9). Thus, it would be necessary the implementation of *definitive or removable ramps, lowered crosswalks, models of monuments for the blind or with information in "Braille" and the creation of places for picking up and dropping off passengers* (I.8/I.9).

"To take accessibility to the medium and long term, since the medium and long term has already started, so the needs of that type of tourists have also started. This way, we may even lose some demand because we are not able to respond to that kind of needs in terms of accessibility, because we still think a lot about physical accessibility, and it is not only the physical accessibility that is in question" (I.8).

Table 35.4 summarizes the urban policies in terms of accessibility to heritage and tourism destination, according to the topics considered and the results obtained in the cities framed in this research.

35.5 Conclusion

Accessibility has become one of the key issues in tourism today. It ensures that all products, services, and environments are developed in a way that everyone can use and benefit from [11]. The increasing aging of the world's population and the large number of people with special needs has fostered the creation of accessible infrastructure and services to address barriers to accessing experiences [8, 54–59]. This is a very complex process that can only be achieved in the long term [9].

The present research aimed to evaluate urban policies in terms of accessibility to heritage and tourism destination, based on the studies by [8, 54–59], and the ISO Standard 21902: 2021 (2021).

Regarding the definition of Accessible Tourism, there was an agreement among the various participants of the two cities, having been defined Accessible Tourism as a type of tourism that offers all people the possibility to enjoy the services, products, and environments designed, independently. In this sense, it is possible to fit the

Table 35.4 Summary regarding the urban policies in terms of accessibility to heritage and tourism destination

Topics under review	Braga	Guimarães
Definition of Accessible Tourism	<i>Integrative Tourism (I.4)</i> <i>It involves equality processes (I.2)</i> <i>Designed for everyone (I.9)</i>	<i>It is a type of tourism or tourist activity that is prepared to receive all kinds of tourists with the most varied limitations (I.8)</i> <i>Services should be adapted or suitable for all types of visitors (I.9)</i>
Accessibility as an opportunity for tourism destinations	<i>Accessibility is a factor conducive to development (I.3)</i>	<i>It is everyone's job to make the destination accessible by solving accessibility problems (I.7)</i>
Framework of accessibility in Braga and Guimarães destinations, under ISO Standard 21902: 2021	<i>Partially accessible city (I.10)</i> <i>Welcoming and integrating city (I.5)</i>	<i>It depends on the place you visit (I.6)</i> <i>Partially accessible city (I.11)</i> <i>"Loss of essence"—by building a structure you are destroying space (I.7)</i>
Accessibility to be considered	<i>There is a lack of coordinated national policy (planning, thinking and action) (I.3)</i>	<i>ISO 21902: 2021 does not apply completely in the city (I.8)</i>

opinion of the interviewees into the definition of Accessible Tourism presented by [8, 55, 56].

Accessibility can be considered as an opportunity (important and strategic factor) for tourism destinations, in this way they agree with [5, 15] and with Decree-Law 163/2006 (2006). However, Braga and Guimarães are still two partially Accessible Tourism destinations, since the process is long term, as emphasized by [5], being necessary improvements in some respects, as the creation of places to pick up and drop off passengers and lowered crosswalks, being necessary to apply measures and strategies presented in ISO 21902: 2021 (2021).

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Chapter 36

Fashion as an Economic Sustainability Indicator in Tourism Destinations' Governance Through Business Participation



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Abstract In the tourism sector, the hosting of events has been playing an increasingly significant role in attracting visitors and differentiating between competing destinations. Events play an important role in a destination's marketing strategy. There are several motivational typologies that induce the growth in the number of participants in fashion events, among them getting to know designers, brands, and new collections, as well as following the trends. Professional motivation is growing as a result of participation and collaboration in the organization of the event itself, or because they intend to get to know the work and stay updated on the strategies used by partner companies and competitors in the sector, representing the place and the moment where new trends are presented for the first time and the occasion where partnerships and commercial exchanges between production, commercialization, and consumption areas take place. The industry strategy for the involvement of all stakeholders in the organization of events associated with a large producing region will emphasize the international involvement of participants, the international competitiveness of the industry, and the tourism destination. It intends to stimulate the region in the perspective of an economically sustainable model and integrate a destination governance strategy associated with this industry. This research aims, through the application of questionnaires to participants of fashion events held in the

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city of Porto between the months of September 2019 and February 2020, to assess the degree of participation, motivation for participation, evaluation of the experience of participation in the event, and corresponding degree of satisfaction. The main results highlight that fashion events can add value to the city of Porto and are directly related to its image and personality as a city and its active, cultured, and cosmopolitan lifestyle.

36.1 Introduction

Fashion events allow the different brands in the fashion industry to introduce themselves to foreign markets by presenting collections that meet the needs of their consumers. This knowledge of foreign markets often occurs through informal conversations between buyers and journalists during fashion events [1–3].

Events can make destinations more attractive and active, as they break the routine of a city [4–8] and allow the desired development of a place or region and its several components [9–12]. In fact, hosting events allows the development of the local community at the political, environmental, economic, and socio-cultural levels [13–17], also enabling the increase of jobs and, consequently, the improvement of the quality of life.

Fashion destinations are destinations recognized by their status [18] and, thus, can be differentiated from their competitors, since they are not easily replaceable and have unique functional and symbolic attributes [19] that make them world-renowned [20, 21]. An individual's loyalty towards an event makes him or her express willingness to participate in future editions of the event and to recommend the event to others [16, 22]. Indeed, satisfied and loyal participants to an event show their willingness to repeat the experience [23] and do so regardless of the location, the date, the price, among other determining factors for those who participate for the first time [24], because loyalty does not originate from the absence of alternatives, but from the customer's willingness to obtain products and services that they know and that meet their expectations [25]. The relationships between the local actors of a tourism destination allow its sustainable development, increase competitiveness, and ensure the success of rejuvenation strategies [26, 27]. Thus, the continuous dialogue and participation of all stakeholders in the organization of events is important [28], as it will allow a regional development, which will be based on the quality of life of the community (residents and visitors) [29].

This article aims, through the application of questionnaires to participants of fashion events held in the city of Porto, between the months of September 2019 and February 2020, to assess the degree of participation, motivation for participation, evaluation of the experience of participation in the event, and corresponding degree of satisfaction.

36.2 Literature Review

To attract a large number of tourists and meet the needs and motivations of diverse target audiences, it is important for Destination Marketing Organizations (DMOs) and event organizers to work together in order to provide them with added value [30].

Indeed, the more appealing a tourist destination is, the higher the demand from various market segments. The higher the perceived value associated with a destination, the greater the overall satisfaction with it [31]. Over time, local governments and institutions began to realize the role of fashion as a creator of identity and strategic advantage, since fashion events attract many visitors, promoting the aesthetic and creative characteristics of a city [32] emerging as differentiating elements, capable of adding value to a destination, in an increasingly competitive tourism market [33, 34]. Thus, fashion events become crucial in the process of promoting a tourism destination worldwide and attracting a high number of visitors [35] offering the city the opportunity to achieve direct and indirect economic and social benefits [32, 36].

36.2.1 Motivation

Tourists and general consumers participate in events because they desire to experience unique and memorable moments, as well as share them with friends, family, and other individuals with common interests [37]. An event constitutes a strategically organized experience aimed at creating an impact in the lives of each participant; therefore, it is essential to understand the expectations of the participants to provide them with a unique experience, ensuring their satisfaction and loyalty.

Motivation is the process that occurs prior to event participation and corresponds to the individuals' need to participate in a specific event [16]. Motivation is based on psychological factors that generate needs and expectations within individuals, which, in turn, result in actions. If motivations are identified in advance, it is possible to tailor the offering to the consumer's needs and expectations [38].

Regarding fashion events, there is a wide range of motivations that contribute to the growth in the number of participants, including getting to know designers, brands, and new collections, as well as keeping up with trends. Many participants are driven by professional reasons, as they collaborate in the organization of the event itself or aim to familiarize themselves with the work and strategies employed by colleagues and competitors in the industry [33]. Fashion events represent the venue where new trends are first introduced and where partnerships and commercial exchanges take place [39]. The primary motivation of fashion event organizers should be the continuous improvement of event quality to enhance participant satisfaction and loyalty [40].

36.2.2 *Experience*

Experiences are events that positively or negatively impact an individual and remain stored in their memory [41] influencing their future behaviours. Schmitt [42, 43] defined experiences as a means of providing sensory, emotional, cognitive, behavioural, and relational values that enhance functional value. Experiences are private and personal, and they are related to how individuals feel emotionally, physically, intellectually, and spiritually [41–45]. An experience is considered better when it is more personal, unique, and memorable and it should involve the sensations of the individual experiencing it [41]. A unique and memorable experience will be forever remembered by an individual and will affect their future behaviour [46]. Thus, authenticity is crucial as experiences are unique and based on personal feelings, motivations, needs, and expectations [47, 48]. Getz [13] believes that experiences encompass an individual's motivations, expectations, and attitudes towards an event, as well as their reflections after the events, which will determine their future behaviour. Every event, regardless of its type, is built upon the experience, and its main objective is to provide participants with moments, emotions, and positive sensations [37].

Mehmetoglu and Engen [49] argues that the evaluation of the experience should be based on the sensations, learnings, and emotions that an event allowed its participants to feel, as well as the attitudes they had before, during and after the event took place. Wood and Masterman [50] lists seven attributes of events that enhance the quality of the experience, including involvement, interaction, immersion, intensity, individuality, innovation, and integrity.

36.2.3 *Satisfaction*

The development of unique and memorable experiences requires careful strategic management by both fashion event organizers and Destination Marketing Organizations (DMOs). However, the provision of these experiences influences the behaviour of the target audience, who will exhibit greater satisfaction and loyalty towards the fashion events they participate in and the destinations where they take place.

Satisfaction is defined by [51] as the outcome of the difference between expectations and the performance of the experience. Consumer satisfaction entails an evaluation of the overall experience [52]. According to [53], satisfaction is based on the comparison between the performance of a product/service and the customer's prior expectations, each experience is unique, and therefore, after each encounter, individuals will feel varying levels of satisfaction or dissatisfaction, depending on whether their expectations were met or not. Thus, satisfaction corresponds to how a lived experience evokes positive feelings in the visitor, based on past experiences and a range of conscious and unconscious influences [54]. Satisfaction, concerning events, results from the comparison between participants' expectations and their

actual experience [55]. It relates to the perceived quality of the event by its participants and is dependent on the experience [16, 56]. The satisfaction of an event is not solely tied to its core elements but also to its secondary elements and characteristics [53, 57].

Therefore, in the case of fashion events, participants' satisfaction is not only connected to the fashion shows and exhibitor spaces but also to other factors such as location, accessibility, and support services, among others. Through evaluation, it is possible to determine the competitive advantage or disadvantage of an event compared to its competitors since satisfaction influences loyalty and, in that sense, the willingness to participate again, as well as to make positive comments about it.

36.3 Methodology

The present research work addresses fashion events as a driver of tourism development in the city of Porto, and thus, its objective is to understand this development.

According to [58], tourism research involves formulating questions and systematically collecting information capable of answering those questions, as well as organizing and analysing data to understand patterns of behaviour and trends that enable a better understanding of tourism development and predict various alternative future scenarios.

Therefore, to fulfil the objective of this research and considering the approach to the problem, the adopted methodology will be quantitative, using a questionnaire survey. The questionnaire survey is a method used when the researcher believes that the phenomenon under study can be better approached through the information provided by individuals in the population in question. Thus, a questionnaire survey consists of presenting a set of questions to a specific group of individuals regarding their perspectives and behaviours towards the situation or problem that the researcher intends to study [59]. Some of the advantages of this technique include the ability to reach many people, ensuring the collection of a great amount of data, ensuring participant anonymity, obtaining quick and concise responses, reducing the risk of distortion, and facilitating comparison between the responses of different respondents.

To gather more concise and systematic information, the choice was made to formulate a questionnaire with closed-ended questions. Two types of closed-ended responses were used in the questionnaire: single-choice questions and Likert scale questions. In the present questionnaire, five-point scales were used, and the different response options are presented in Table 36.1.

The questionnaire begins with a brief description of the study and informed consent, in which respondents can learn about the research objectives, the importance of their participation for the success of the study and be informed about the anonymity and exclusive use of the responses for academic purposes. The questionnaire is divided into seven parts, as given in Table 36.2.

Table 36.1 Likert scale categories used in the questionnaire

1	2	3	4	5
Not important at all	Not very important	Important	Very important	Extremely important
Not likely	Unlikely	Probable	Quite likely	Very likely
Disagree	Partly agree	Agree	Strongly agree	Totally agree
Very dissatisfied	Dissatisfied	Satisfied	Very satisfied	Extremely satisfied

Source Authors

Table 36.2 Structure of the questionnaire

Part 1	Individual tourist profile
Part 2	Travel characteristics
Part 3	Event (knowledge and experience of previous editions' participation)
Part 4	Motivation
Part 5	Experience
Part 6	Satisfaction
Part 7	Loyalty (regarding the event and the destination)

Source Authors

In the first part, there are six questions related to the Individual Profile of the Participants, the second part consists of eight questions related to Trip Characteristics, and the third part refers to the Fashion Events in the City of Porto.

The remaining four parts are dedicated to motivation, experience, satisfaction, and loyalty, respectively. They consist of a total of six Likert scale questions (Table 36.3).

In addition to the Portuguese version, the questionnaire was translated into three other languages: English, Spanish, and French. A total of 410 questionnaires were collected.

Table 36.3 Number of questionnaires collected per event

Event	Total participants (estimate)	Number of questionnaires collected
PortoFashionWeek NightOut	10.000	20
MODtíssimo 54	6.500	100
Portugal Fashion SS20	15.000	150
Sustainability talks	150	20
Young designers competition	50	20
Modtíssimo 55	7.000	100

Source Authors

36.4 Results

The collected data will be subsequently analysed in a descriptive manner through the application of the questionnaire to the participants of fashion events held in the city of Oporto between September 2019 and February 2020. The sample consists of 410 individuals, distributed across the events listed in Table 36.4.

In the sample, 36% participated in the event “Portugal Fashion Spring Summer 2020”, 24.4% participated in the event “MODtíssimo 54”, 24.4% participated in the event “MODtíssimo 55”, 4.9% participated in the event “Porto Fashion Week Night Out”, 4.9% participated in the event “Portugal fashion News 19”, and 4.9% participated in the event “Sustainability Talks”.

36.4.1 Motivation

Following results refer to the motivations that lead to participation in fashion events (Table 36.5).

On average, the highest importance is given to “Other”, followed by “Professional Reasons”, then “Networking with People with Common Interests”, followed by “Staying Updated on New Trends”, “Cultural Enrichment”, and “Curiosity about the Event”, which all have average values above the midpoint of the scale. They are followed by “Discovering New Collections” and “Getting to Know Brands”, which also have average values higher than the midpoint of the scale. Lastly, “Being Recognized” and “Getting to Know Designers” have average values lower than the midpoint of the scale (Tables 36.6 and 36.7).

Another reason, justifying attendance at events, is the acquisition of clients (Table 36.8).

In the sample, regarding the consideration of visiting the city of Porto and exploring its most iconic places during the event days: 20.5% respond “Not likely

Table 36.4 Frequency table: event

	Frequency	%
MODtíssimo 54	100	24.4
MODtíssimo 55	100	24.4
Porto Fashion Week Night Out	20	4.9
Portugal Fashion News 19	20	4.9
PortugalFashion Spring Summer2020	150	36.6
SustainabilityTalks	20	4.9
Total	410	100.0

Source Own elaboration based on SPSS outputs

Table 36.5 Frequency table: rate the reasons that motivated you/us to participate in the event, according to its degree of importance

	1		2		3		4		5	
	N	%	N	%	N	%	N	%	N	%
Meeting designers	85	20.7	74	18.0	140	34.1	57	13.9	54	13.2
Getting to know brands	39	9.5	40	9.8	151	36.8	101	24.6	79	19.3
Discovering new collections	40	9.8	47	11.5	126	30.7	106	25.9	91	22.2
Staying up to date with new trends	23	5.6	28	6.8	125	30.6	114	27.9	119	29.1
Networking with like-minded individuals	26	6.3	29	7.1	93	22.7	104	25.4	158	38.5
Being recognized	123	30.0	55	13.4	91	22.2	53	12.9	88	21.5
Cultural enrichment	19	4.6	37	9.0	131	32.0	103	25.1	120	29.3
Curiosity towards the event	15	3.7	42	10.2	142	34.6	102	24.9	109	26.6
Professional reasons	48	11.7	14	3.4	35	8.5	60	14.6	253	61.7
Other					1	5.6			17	94.4

The values indicated refer to the measurement scale: 1—not at all important; 2—not very important; 3—important; 4—very important; 5—extremely important

Source Own editing based on SPSS outputs

Table 36.6 Statistics: rate the reasons that motivated you/us to participate in the event, according to its degree of importance

	N	Average	Standard deviation	Variance coefficient (%)
Meet designers	410	2.81	1.28	46
Knowing brands	410	3.34	1.17	35
Meeting new collections	410	3.39	1.23	36
Keeping up with the new trends	409	3.68	1.13	31
Networking with people with common interests	410	3.83	1.20	31
Getting recognized	410	2.82	1.52	54
Cultural enrichment	410	3.65	1.13	31
Curiosity about the event	410	3.60	1.09	30
Professional motives	410	4.11	1.37	33
Other	18	4.89	0.47	10

The values indicated refer to the measurement scale: 1—not at all important; 2—not very important; 3—important; 4—very important; 5—extremely important

Source Own editing based on SPSS outputs

Table 36.7 Frequency table:
other: which?

	N
Raise customers	3
Search suppliers	1
Promote collections	1
Advertise	1
View family work	12

Source Own editing based on SPSS outputs

Table 36.8 Frequency table:
would you consider visiting
the city of Porto and getting
to know its most emblematic
places during the days of the
event?

	N	%
Not probable	84	20.5
Not very probable	48	11.7
Probable	61	14.9
Quite probable	53	12.9
Very likely	164	40.0
Total	410	100.0

Source Own editing based on SPSS outputs

at all”, 11.7% respond “Unlikely”, 14.9% respond “Likely”, 12.9% respond “Quite likely”, and 40.0% respond “Very likely”.

36.4.2 Experience

Following results refer to the experience lived during fashion events (Tables 36.9 and 36.10).

On average, the agreement is higher for “During the event, I felt in a good mood” followed by “The fact that the event took place in Porto improved my experience”, “The event allowed me to get to know the work of various professionals better”, and “The atmosphere of the event is welcoming and stimulating”.

Table 36.9 Frequency table: regarding your experience, please indicate to what degree you agree with the following statements

	1		2		3		4		5	
	N	%	N	%	N	%	N	%	N	%
The event allowed me to meet designers and brands I didn't know before	32	7.8	45	11.0	169	41.3	75	18.3	88	21.5
The event allowed me to get to know the new trends	26	6.3	53	12.9	153	37.3	100	24.4	78	19.0
The event allowed me to get to know the work of several professionals better	14	3.4	31	7.6	151	36.9	120	29.3	93	22.7
The event enriched my knowledge	13	3.2	53	12.9	159	38.8	101	24.6	84	20.5
The event has stimulated my curiosity	17	4.1	47	11.5	149	36.3	105	25.6	92	22.4
The atmosphere of the event is welcoming and stimulating	6	1.5	48	11.7	141	34.4	128	31.2	87	21.2
The activities developed at the event are dynamic and creative	19	4.6	62	15.1	166	40.5	107	26.1	56	13.7
The event appealed to my sensations	21	5.1	72	17.6	165	40.4	97	23.8	53	13.0
The event appealed to my creative thinking	21	5.1	69	16.8	140	34.1	116	28.3	64	15.6
During the event I felt identified with the world of fashion	20	4.9	39	9.5	135	32.9	128	31.2	88	21.5
During the event I felt in a good mood	2	.5	29	7.1	117	28.5	136	33.2	126	30.7
The event surprised me	38	9.3	83	20.2	137	33.4	90	22.0	62	15.1
The event captivated me	17	4.1	58	14.1	158	38.5	106	25.9	71	17.3
I got involved in the event	16	3.9	52	12.7	162	39.5	107	26.1	73	17.8
I actively participated in the event	25	6.1	38	9.3	131	32.0	120	29.3	96	23.4
During the event I didn't notice time passing by	33	8.0	76	18.5	115	28.0	85	20.7	101	24.6
I want to share my experience	26	6.3	51	12.4	124	30.2	98	23.9	111	27.1
I took pictures and recorded videos to share on social networks	78	19.0	35	8.5	88	21.5	80	19.5	129	31.5
I want to buy pieces of the designers/brands present in the event	131	32.0	66	16.1	87	21.2	72	17.6	54	13.2

(continued)

Table 36.9 (continued)

	1		2		3		4		5	
	N	%	N	%	N	%	N	%	N	%
Participating in the event allowed me to get to know (better) the city of Porto	157	38.3	67	16.3	76	18.5	52	12.7	58	14.1
The fact that the event took place in the city of Porto improved my experience	37	9.0	40	9.8	105	25.6	78	19.0	150	36.6

The values indicated refer to the measurement scale: 1—disagree; 2—I partially agree; 3—I agree; 4—I strongly agree; 5—I totally agree

Source Own editing based on SPSS outputs

Table 36.10 Statistics: regarding your experience, please indicate to what degree you agree with the following statements

	N	Average	Standard deviation	Variance coefficient (%)
The event allowed me to meet designers and brands I didn't know before	409	3.35	1.16	35
The event allowed me to get to know the new trends	410	3.37	1.12	33
The event allowed me to get to know the work of several professionals better	409	3.60	1.03	28

36.5 Conclusion

Fashion events' tourism is effectively a sector of event tourism that has become increasingly emphasized in recent years. Fashion tourism is characterized by the fact that visitors choose destinations that meet their needs regarding their shopping desires and participation in fashion events [60] which, in turn, consist of promotional events [60] in which designers and fashion companies present their new collections [61]. Over the past few years, local governments and institutions have begun to appreciate the role of fashion as a creator of identity and strategic advantage.

To define the objectives, a scientific literature review was carried out exposing several contents related to the theme of fashion event tourism. The methodology chosen for the application of this study was quantitative, by applying questionnaires to 410 participants of fashion events held in the city of Porto between the months of September 2019 and February 2020. In addition to the Portuguese version, the questionnaire was translated into English and Spanish. The results showed that fashion events can add value to the city of Porto and are directly related to its image and city personality and its active, cultured, and cosmopolitan lifestyle. The respondents

also recognize the existence of a concern, on the part of the organization of these events, for the valorization of tourism resources and emblematic places of the city, emphasizing the need to enhance the destination simultaneously with the satisfaction regarding the fashion events hosted in the city of Porto.

Over time, local governments and institutions began to realize the role of fashion as an identity creator and strategic advantage, since fashion events attract many visitors, promoting the aesthetic and creative characteristics of a city [32], emerging as differentiating elements, capable of adding value to a destination, in an increasingly competitive tourism market [33, 34].

Similar studies should be developed at national level to contribute to the scientific knowledge of this tourism segment, which is still underappreciated in Portugal, as well as to deepen the research in the scope of the individual and behavioural profile of the fashion events tourist, adding the associated experiential marketing aspects.

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Chapter 37

Technology Applications in the Competitiveness of Tourism Destinations



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Abstract The development and emergence of new technologies in tourism have revolutionized the sector and business operations and have also become an important factor in the competitiveness of tourist destinations. The use of these technologies contributes to the differentiating factor between destinations, which is why their implementation is seen as a priority. On the other hand, the use of technology in destinations also improves tourism products and services and thus provides innovative experiences for tourists. This article aims to understand the importance of technology in the development of a destination by researching and analyzing information on innovative technologies such as artificial intelligence, virtual and augmented reality, and robotics. The importance of applying these technologies to the competitiveness of tourism destinations will be assessed and a comparative analysis undertaken of the destinations in the northern region of Portugal with the greatest degree of use in the promotion and information of these destinations. Finally, recommendations and proposals will be drawn up for improving technologies in the region. The main conclusions point out that the application of technology in tourism in the northern region of Portugal is insufficient. In addition, there is not enough variety in the

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technologies implemented, since most of them are related to virtual and augmented reality.

37.1 Introduction

According to Ivanov and Webster [1], new technologies were introduced in the service industry in a short space of time, significantly changing the way humans do business or interact with companies. Tourism was one of the first sectors to implement technology and digitalization in its business processes at a global level, becoming, for example, a pioneer in providing online booking platforms for accommodation or flights. As information and communication technologies (ICT) evolve, the tourism sector has increasingly adopted these technologies.

The emergent interaction between technology and tourism has resulted in fundamental changes in the industry and our perception of it [2]. The authors go on to say that technology is increasingly revolutionizing the tourism sector and determining the strategy and competitiveness of tourism organizations and destinations. The evolution of information and communication technologies (ICT) has radically transformed the dynamics and way of doing business in the tourism sector. This has led to increased competitiveness among service providers, who now have to offer consumers innovative experiences to satisfy them and build loyalty [3].

Tourist behavior has also been affected in their daily lives by various digital and technological processes. Technology has allowed tourists to become much more informed and to take a proactive role in organizing their trip.

According to Neuhofer et al. [4], new forms of tourist activities are emerging thanks to the emergence and development of new technologies, which are changing conventional tourist experiences. In addition, with the emergence of the Internet, consumers have gained more and more autonomy, playing a more active role in co-creating experiences. The authors conclude that this co-creation and technology are important for the tourism sector, as they make it possible to create personalized and meaningful experiences for tourists.

This research aims to understand the importance of technology in the development of a destination by researching and analyzing information on innovative technologies such as artificial intelligence, virtual and augmented reality, and robotics. The importance of applying these technologies to the competitiveness of tourist destinations will be assessed and a comparative analysis will be carried out of the destinations in the northern region of Portugal with the greatest degree of use of technology in their promotion and information.

37.2 Literature Review

Artificial intelligence (AI) is described as the intelligence demonstrated by a machine in reproducing human-like abilities. According to Lai and Hung [5], AI refers to a set of technologies that can imitate human sensitivity, thinking, reasoning, and action to solve problems. In the tourism industry, artificial intelligence is being applied, through tests, to personalization and recommendation systems, personal travel assistants, robots, prediction systems, language translation applications, voice recognition, and natural language processing systems [6].

Artificial intelligence is relevant to the tourism sector as it can help tourists make decisions related to flights, hotels, tour packages, attractions, among others. According to Tussyadiah and Miller [7], from the consumer's point of view, AI provides a better experience for tourists, giving them flexibility, useful and relevant information, and facilitating decision-making. Artificial intelligence will be key in automating requests and serving tourists, responding instantly to their needs via video calls or *chatbots*. *Chatbots* are *software* programmed to converse naturally and answer simple questions, identifying keywords to provide multiple answers to a single question [8]. In addition, they are available 24 h a day, 7 days a week, and 365 days a year, eliminating the need for employees.

A fundamental application of AI will be using facial recognition of tourists, through an image or a video. According to Gupta et al. [9], the facial recognition system processes data, detecting the shape of the face and collecting its facial expressions. This information is then compared with a pre-existing database to identify or authenticate the individual. This type of technology can be used, for example, in the *check-in* process at a hotel or at airports, automatically recognizing a tourist's face.

AI could also be used to alter the tourist's surroundings. Hotel rooms can be automatically adjusted to a specific temperature [9]. They could also adapt the music and lighting to the tourist's wishes, autonomously detecting the need for these adaptations without the tourist having to make any specific request [6]. Artificial intelligence currently brings many benefits to the tourism sector, but it also brings challenges and risks. According to Bulchand-Gidumal [6], one of the main concerns of tourists is related to the fear of surveillance, the threat to privacy that AI systems can pose, since they collect massive amounts of data and, more importantly, can deduce patterns and information from it. Gretzel [10] adds that intelligent systems capture information about their environment and their users, which is highly personal and therefore a threat that raises significant ethical concerns.

Mihret [11] defines robotics as the domain of knowledge and techniques that can be used to create robots. Robotics is a branch of engineering that involves the conception, design, manufacture, and operation of robots. The author adds that robots are designed to perform various tasks in place of human beings and points out that they are more than just computers, being able to sense and react to changes in their environment.

A robot is an autonomous machine (a physical object) that incorporates AI and senses the environment, allowing it to make decisions and carry out actions [6].

Beer et al. [12] state that the two main characteristics of a robot are its autonomy and its ability to sense and manipulate the environment. The authors define autonomy as “the ability of a robot to sense its environment, plan based on that environment, and act on that environment with the intention of achieving a specific task goal (given or created by the robot) without external control.” Ivanov and Webster [1] add that a robot’s level of autonomy determines whether it will be able to carry out its assigned task independently (thus replacing workers) or whether it will only support workers in carrying it out.

Robots are equipped with various sensors that allow them to obtain data and information about their surroundings such as objects, sound and voice, location, distance, pressure, temperature, energy consumption, facial recognition, among others [1].

According to Murphy et al. [13], robots can be divided into three different categories: industrial robots, professional service robots, and personal service robots. Ivanov and Webster [1] state that these robots can be used in hospitality, giving examples of the use of industrial and professional service robots for *back office* operations, such as cleaning rooms, and the use of personal service robots for *front office* operations, such as *concierge and* room services or entertainment.

Some of the main advantages of using robots in the tourism sector include improving the tourist experience, simplifying the work process, allowing human labor to focus on other activities, and making tourism more efficient [8]. The authors present, as an example, the use of robots at the reception desk of a hotel, which have a direct implication on the interaction and experience of guests and are becoming a trend in the sector.

One of the most important implementations of new technologies and their impact on tourism is virtual reality (VR).

Virtual reality is defined as the technology that uses an artificial 3D environment, generated by a computer and called a “virtual environment,” with the aim of providing its user with a sense of psychological presence and physical interaction with that same environment [14].

According to González-Rodríguez et al. [15], virtual reality is a constantly evolving technology that is increasingly being used in tourism, particularly in areas such as hotels, entertainment, restaurants, museums, among others. The authors add that it gives the consumer a good image of the destination and helps to improve the experience.

For tourism, virtual reality is important and deserves a lot of attention, as it has numerous useful applications that can have a significant impact on the sector. For Guttentag [16], virtual reality could become very important for the sector, especially in planning and management, marketing, entertainment, education, accessibility, and heritage preservation.

Firstly, in the planning phase, for example, VR allows users to create realistic virtual environments, where they can analyze and observe them from different perspectives. In addition, virtual environments can be used to illustrate and communicate plans [16].

On the other hand, VR can also be used to carry out and improve the marketing of a tourist destination. Since the service is intangible and cannot be tested in advance, VR

is able to provide sensory information about the destination, making it an important marketing tool and, consequently, helping tourists to make more informed decisions and have more realistic expectations [16].

Perhaps, one of the most important applications of VR will be in heritage preservation. VR makes it possible to recreate a particular site or object in a virtual model, using precise data that can be stored indefinitely. This recreation allows observation without the risk of damaging or compromising the object or site, making it a good alternative for accessing places considered to be under threat [16].

But if, on the one hand, this use of VR is important, in this case for preservation, on the other hand, the authenticity and limitations of this technology may be questioned by tourists. Many aspects that characterize the tourist experience in a real environment can never be faithfully reproduced in a virtual environment. For Guttentag [16], VR should only be seen as an acceptable substitute for the consumer.

Virtual reality will certainly continue to evolve, and, from this perspective, it is possible to consider the increased opportunities for implementing this technology in the tourism sector. However, we cannot rule out the issues and challenges that will also arise with its use.

Currently, another form of technology that is increasingly being used to improve tourism and the consumer experience is augmented reality (AR).

According to Azuma et al. [17], augmented reality is defined as a technology that fits real and virtual elements into the world, i.e., both coexist in the same real environment and are also an interactive, real-time experience.

Yovcheva et al. [18, p. 27] describe the augmented tourism experience as “a complex structure that involves the emotions, feelings, knowledge, and skills that come from perceiving, processing, and interacting with virtual information that merges with the real physical world that surrounds the tourist.”

Although similar, augmented reality (AR) should not be confused with virtual reality (VR). AR allows physical interaction with reality and complements the tourist experience, while VR is limited to the virtual environment and is used before and after the trip [18, 19].

According to Buhalis et al. [20], AR uses portable devices such as *smartphones*, glasses, and *wearables* to display layers of information superimposed on the real world.

Portable devices help complement the experience by presenting much more personalized content adapted to the specific needs of the tourist. They can present new or more complete information about the place or object the user is viewing or present new perspectives on them (e.g., viewing monuments that are in ruins or no longer exist, such as the city of Pompeii or the Lighthouse of Alexandria).

The real-time information in different languages that AR provides can offer an alternative to standard tourist guides, identifying tourist points of interest, accommodation, restaurants, transportation, and directions, as well as ratings and reviews [21].

As AR is very important for improving the tourist experience, it is also becoming an important marketing tool for companies. They can use the technology to create previews of the destination, hotels, restaurants, and attractions that consumers can

visit, helping them plan their vacations and make decisions [21]. According to a study carried out by Cranmer et al. [22], it was concluded that AR would be especially important for marketing, as it would reduce its costs and provide more accurate and attractive information to the consumer.

As well as helping to improve marketing, Cranmer et al. [22] recognize that this technology can help add value to organizations by demonstrating opportunities to improve relationships and communications, processes and functions. According to the study, AR can facilitate communications between departments and relationships with new and potential customers.

The use of AR by operators would also help the tourist by offering more security and helping to set expectations. Due to greater access to information, the tourist's expectations will be more appropriate, reducing possible disappointments and complaints, which can be costly for tour operators [22].

The tourism competitiveness of a destination refers to the ability of the place to optimize its attractiveness to residents and non-residents by offering quality, innovative, and attractive tourism services (e.g., good value for money) to consumers and winning market shares on the national and global markets, while ensuring that the resources available to support tourism are used efficiently and sustainably.

According to Del Chiappa and Baggio [23, p. 145], "in an increasingly globalized and extremely dynamic environment, innovation is the key element for cities and tourist destinations to be competitive."

Mira et al. [24] state that for a destination to be competitive, it must innovate by forming strategic alliances with all the players in the sector, optimizing and preserving endogenous resources, applying marketing strategies, and constantly monitoring the destination. The authors add that quality is an important factor, saying that a destination's competitiveness is achieved when it can guarantee a quality tourist experience for its visitors and quality of life for its residents (Table 37.1).

For Dupeyras and MacCallum [25], these key elements should be considered in an assessment of tourism competitiveness (according to detailed data from surveys of countries by the Organization for Economic Cooperation and Development).

37.3 Results

Portugal Agenda presents unique shows that spark the imagination of visitors. The company offers visitors immersive experiences of different themes and artists, both national and international, so that they can appreciate culture and art in an innovative way, using technology to do so. To provide these experiences, Portugal Agenda uses immersive technologies such as virtual and augmented reality, holograms, light projections, *video mapping*, gesture controls, and motion capture.

Portugal Agenda offers these shows not only in Lisbon, but also in the city of Porto. Here, the company's shows can be enjoyed at venues such as the Clérigos Church, the Botanical Garden, and, above all, the *Immersivus Gallery* at Alfândega do Porto. The *Immersivus Gallery* is the first immersive art experience gallery in

Table 37.1 Key elements that define competitiveness in tourism

Key elements identified	Observations	Country responses
Tourism governance	Government support and tourism as a priority, regulations, an overall government approach, a tourism strategy, safety and security, public–private partnerships, vertical cooperation, statistics and data, multilateral cooperation, institutions (e.g., National Tourism Council), earmarked budget to support tourism	Belgium, Canada, Chile, Egypt, Greece, Italy, Poland, Portugal, Spain, Turkey, UK
Product development	Product differentiation, innovation, investments, market share, providing unique experiences, increasing the added value of tourism, developing high-value segments, market perspective (including potential travelers, tour operators and small businesses)	Australia, Austria, Belgium, Brazil, Canada, Denmark, Finland, France, Germany, Hungary, Israel, Mexico, New Zealand, Norway, Poland, Spain, Turkey, UK
Quality of tourist services	Improving quality, welcoming visitors, quality of life, equity and social cohesion, consumer services	Austria, Belgium, Brazil, Czech Republic, Denmark, Finland, France, Germany, Hungary, Portugal, Slovenia, Spain
Price competitiveness	Prices, exchange rates, value for money, taxes	Australia, Belgium, Czech Republic, Denmark, Egypt, Finland, France, Germany, Greece, Norway, Poland, UK
Accessibility/ connectivity	Development of infrastructures, geostrategic position of the destination, proximity	Australia, Belgium, Brazil, Chile, Czech Republic, Finland, Greece, Italy, New Zealand, Norway, Poland, Portugal, Slovenia, Spain, Turkey, UK
Destination brand	Promotion and marketing, identity, image, destination knowledge, attractiveness, market diversification	Australia, Austria, Brazil, Canada, France, UK

(continued)

Table 37.1 (continued)

Key elements identified	Observations	Country responses
Natural and cultural resources	Sustainability, gastronomy, climate, biodiversity	Belgium, Brazil, Chile, Czech Republic, Denmark, Egypt, Finland, France, Germany, Greece, Hungary, Israel, Italy, Poland, Portugal, Slovenia, Spain, Turkey
Human resources development	Skills, education and training, labor productivity, tourism training centers	Belgium, Chile, Estonia, Greece, Spain, and Turkey

Source Dupeyras and MacCallum [25], adapted

Portugal, installed in the Furnas da Alfândega, where content is projected onto the floor, walls and ceiling. According to *Immersivus*, with 2000 m² of 360° projection area, this gallery will become a national artistic reference point (Fig. 37.1).

On June 24, 2022, as part of the commemorations of the Battle of S. Mamede, entrepreneur Marco Génio presented a unique project in Portugal that allows the public to interact with the history and heritage of the city of Guimarães. Called “Afonso 360,” it is an interactive film that portrays the day-to-day life of King Afonso Henriques, using new tools and innovative immersive technologies, 360LI, and virtual reality. According to the entrepreneur and the municipality of Guimarães, this interactive film lasts approximately eight minutes, in which you can visit and watch the daily life of Guimarães Castle when D. Afonso Henriques was king of Portugal or even watch a recreation of the Battle of S. Mamede, fought on June 24, 1128. To be as faithful as possible to history and real events, this project has obtained contributions

Fig. 37.1 “Porto Legends, the Underground experience,” at Alfândega do Porto. Source Portugal Agenda (2023)



Fig. 37.2 Presentation with the Municipal Executive and the Minister of Internal Affairs (external module).
Source official Facebook page (2022)



from historians and researchers. It becomes interactive, since the visitor “can become the director, thanks to the possibility of choosing the respective setting” (Fig. 37.2).

This immersive experience is a totally national and innovative production, which can be enjoyed by anyone visiting Guimarães, through places to watch the film, installed inside the castle or outside, more specifically, in the keep or in a module positioned next to the Paço dos Duques de Bragança, with space for more than a dozen people. People with reduced mobility can also enjoy this experience using a mechanical platform to visit the monument. Finally, the film is available in five languages: Portuguese, Spanish, English, French, and German.

This project is an initiative of the Northern Regional Directorate for Culture, and its inauguration was attended by the Minister of Internal Affairs, José Luís Carneiro, the Mayor of Guimarães Domingos Bragança, and other members of the municipal executive.

In 2021, Viana do Castelo City Council launched the official Geopark website and a *smartphone* app. The use of technology is intended to preserve nature and the park’s geological heritage and is a partnership between the council and the Portuguese company Ubiwhere. In addition, it would help the visitor’s tourist experience and the monitoring of the park.

The *smartphone* application helps the visitor to identify and recognize the heritage and geological resources, allowing for greater visitor autonomy. Furthermore, using augmented reality, additional information can be provided to the visitor, making the experience more immersive and interactive. According to Ubiwhere, other resources are available to the visitor, such as interactive panels where they can view cartographic elements, 3D objects, photography, and panoramic animations (Fig. 37.3).

Also, in 2022, the North Regional Culture Directorate (DRCN) announced that the museums would offer visitors new resources using virtual reality and augmented reality. The DRCN announced the launch of the “Museus Portugal” platform in partnership with the company DKS Studios and with the support of the Garantir Cultura Program. This platform aims to create a unique and immersive experience



Fig. 37.3 Area of the park with a *QR code* to get more information through *smartphone*. *Source* Coastal Geopark

of information, photography, video, and 3D and 360° content about museums that anyone can experience.

According to DRCN, through a *smartphone* application and augmented reality technology, users will see interactive images superimposed on reality and will have access to text, video, photographs, and 3D objects by pointing their *smartphone* at a space, work of art or artifact, and will also be guided by a virtual robot.

The seven museums managed by the DRCN would use these new resources: Biscainhos Museum and D. Diogo de Sousa Museum (Braga), the Paço dos Duques de Bragança and Alberto Sampaio Museum (Guimarães), Abade de Baçal Museum (Bragança), Lamego Museum, and Terra de Miranda Museum (Miranda do Douro).

In addition to implementing VR and AR, the Northern Regional Directorate for Culture announced the SIAP project, an artificial intelligence system that uses machine learning and data processing techniques to detect and alert potential risks to heritage in advance, through constant monitoring. As a result, it contributes to increased security and a reduction in possible maintenance costs.

37.4 Conclusion

The DRCN has already implemented virtual reality and augmented reality technologies in its museums. It is recommended that these technologies also be implemented in other museums in the northern region and not just those run by the DRCN, offering visitors a wide range of options.

The use of robots in tourism and hospitality should also be further developed. The use of the two robots at Yotel Porto, as well as the *smartphone* app and other smart devices in the establishment, demonstrates the hotel sector's capacity for innovation by creating more automated processes and, consequently, guiding customer service

for longer. On the other hand, for those who are not tech-savvy, the traditional hotel experience should be available, offering tourists different options to choose from, adapting to their trends, generations, and preferences [26–30]. This hybrid experience should therefore be implemented in more hotels in the region, especially in the large hotel chains, which have a great deal of investment power.

Overall, the northern region of Portugal shows a precarious use of technologies in the tourism sector, especially in the interior north, more specifically in the regions of Alto Tâmega, Douro and Terras de Trás-os-Montes. On the other hand, in the northern coastal regions, it is possible to see some use of the technologies discussed, but still limited.

In addition to the small number of technologies used in the region, in some cases they provide little information about their purpose and usefulness. In this research, it was often necessary to consult some news or articles to obtain more information, as it was not available on the official website of the entity or organization. This could be a flaw in the marketing department of some companies in the region.

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Chapter 38

Events' Tourism and Hospitality Marketing



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Abstract Event tourism has seen significant growth in recent decades, playing a key role in the development of tourism destinations. In fact, several studies have focused on understanding this phenomenon, studying the relationship between the different types of events and their influence on the destinations that host them. However, few publications analyze the relationship between events that take place in cities and the hotel industry. The existing articles that establish this relationship are limited to *pricing*, so it is pertinent to analyze this relationship in a more comprehensive way, namely the strategies adopted by hotels when events take place in cities. This study aims to understand the influence of events held in the cities of Lisbon and Porto on the hotel industry, specifically from the perspective of hotel *marketing*. To this end, a qualitative, exploratory, descriptive, and cross-sectional research methodology was adopted, carried out through semi-structured interviews with seven representatives of hotel units and four representatives of entities linked to the organization of events in the aforementioned cities. The general aim of the research is to understand how events influence hotel *marketing* in the cities of Lisbon and Porto. The results show that business events and sporting events are the most important for the hotel industry in these cities. About the strategies adopted when events take place in the city, hoteliers

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attach great importance to the price strategy and have increasingly adopted a digital *marketing* strategy, which facilitates segmentation and reaching specific audiences. It was also found that the relationship between hotel units and event organizers, despite being at an early stage, is highly valued and that given the current scenario, derived from COVID-19, the industry's recovery actions should focus on actions to transmit security to the customer.

38.1 Introduction

In recent years, cities have seen constant growth and development. According to [1], events have been one of the driving forces behind these changes, generating attractiveness and major economic benefits for cities. In fact, although there is a constant growth in tourist destinations, combating seasonality seems to be one of the biggest challenges, making it crucial to find strategies to mitigate this trend [2]. In this sense, events can emerge as a solution, since many of them, such as business events, take place at times of low demand [3].

An event can be considered a unique spatio-temporal phenomenon since it is unrepeatable and calls for an experience. The term "event tourism" began to be used at the end of the 1980s and establishes an association between events and tourism, which is characterized by the set of attractions created for the purpose of satisfying visitors' needs [4].

The growing interest in events has triggered a series of studies on the subject. Indeed, [5, 6] in their research highlighted the importance of event tourism in *branding* a destination, which can be used as a tourism and product development strategy.

38.2 Literature Review

According to the *United Nations World Tourism Organization* (UNWTO), tourism has experienced exponential growth in recent decades. This continuous development, combined with the diversification and differentiation of the sector, makes it one of the most important economic sectors in the world [7].

The global expansion of tourism has also brought various benefits to local economies, as it is not only responsible for creating jobs in various areas, but also plays a crucial role in the development of new infrastructures, which is reflected in an increase in the value and relevance of regions [7, 8].

However, there are some growing trends among consumers, namely traveling "to change", where consumers seek local authenticity, and traveling "to show". The latter is closely linked to the emerging relevance attributed to social media, whereby

consumers feel the need to go in search of “instagrammable” destinations, experiences, and moments [7]. In this context, event tourism could play an important role, so investing in this sector becomes pertinent.

Events can be seen simultaneously as enhancers of a destination's attractiveness, but also, and above all, as key *marketing* elements in the promotion of places, given the high global competitiveness in attracting visitors [1, 5, 6].

Events should therefore be considered from both a demand and a supply perspective [5]. Thus, it is important to analyze and understand a series of aspects related to the demand perspective, namely determining who travels to participate in events, what their motivations are, what they do, and how much they spend. From a supply perspective, it is important to understand that destinations promote different types of events to achieve various objectives, including attracting tourists, especially at times of low demand; creating a positive image of the destination; contributing to the overall *marketing of the destination*, among others [5]. In fact, more recently, [6] highlighted the importance of event tourism in *branding* a destination, as a tourism strategy and product development. They listed five propositions that reveal the importance of event tourism in a city. The first is the creation of economic benefits and the others derive from this, namely: developing a positive image and supporting the construction of the destination's brand; cooperation in *marketing* by making cities more appealing; livening up cities; and finally, the fact that events act as catalysts for other forms of development, such as improving infrastructure, for example.

Although tourism has experienced high global growth, combating seasonality continues to be the biggest challenge for many destinations. In this sense, it is crucial to create strategies that make it possible to mitigate this trend in tourism [2].

Seasonality can be largely influenced by two sets of factors. The first is considered natural, examples of which are the climate, the location associated with the climate, and the hours of sunlight. The other set of factors is institutional and related to leisure time, the school calendar, social norms, among others [2].

The high disparities in visitor numbers and revenue suggest that for many attractions in various destinations, outside of high demand seasons, there is a need for innovation and diversification in terms of product development. For others, seasonality could mean their total or partial closure. From a political and *marketing* point of view, the continued operation of destinations' various attractions can make a positive contribution to the promotion of regions in an innovative way, favoring the stabilization or growth of local economies [2].

Business events have been studied for the economic value they bring to cities, rural areas, or countries themselves. The increase in the number of meetings, congresses, and conventions has set the tone for the competitiveness between cities to become increasingly intense, thus enabling the growth of venues that want to invest in this type of event [9].

Although business events can take many different forms, there are some common characteristics. As far as location is concerned, most of these events usually take place in urban centers, as these are the places that most easily have the infrastructure appropriate to the size and needs of the events, such as a greater range of hotels and transport facilities [10, 11].

As for the time factor, most of these events take place on weekdays, which are considered working days in Western society. In addition, spring and fall tend to be the preferred seasons for holding this type of event. As such, this factor is one of the main reasons why these events are so important for the hotel industry, as they take place at times of low demand, thus offsetting the seasonality mentioned above [3, 10, 11].

A survey carried out by Expedia in 2018 found that around 60% of business trips in the USA were converted into *bleisure*. It is also found that this trend is consistent with four other countries: the UK, Germany, India, and China. A sample of around 2500 individuals from these five countries confirmed that there is a tendency to extend their stay on *bleisure* trips—an average of 2.9 leisure days in addition to 3.9 business days.

Cultural events have played a crucial role in the development and revitalization of urban environments. The emergence of cultural events has greatly contributed to improving the image of cities, as they have added “life” to city streets [1, 12].

Although it is difficult to define precisely what cultural events are, [1] identified some aspects that are common to the different types of cultural events. As a rule, they have a content that focuses on the community’s roots or artistic aspects. In addition, they comprise a series of activities, are recurrent, have a limited duration, and are generally commemorative in nature.

The growth of tourism in a city is directly related to its hotel capacity. In fact, a low hotel supply can be a determining factor in a city not being chosen to host major events and festivals [13]. However, there is not much evidence to establish the direct impact that festivals and entertainment events have on the hotel industry, nor how they influence revenue maximization strategies or occupancy rates [13].

Although, of course, the occurrence of festivals and events should be reflected in an increase in the *average daily rate* (ADR) and *occupancy rate* (OR), there are some aspects that influence this growth. These aspects include the fact that tourists attending these events can opt for other forms of accommodation, such as *Airbnb*, friends, or family homes or even not staying at all—*one day trippers* [13].

The focus on different types of events has contributed to a greater diversification of tourism. In this way, events have played an important role in meeting the demands of tourists with different expectations. Over time, consumer behavior has undergone some changes. Nowadays, tourists crave novelty, which leads them to seek out different types of experiences [14].

With the growth of tourism, tourists’ motivations for traveling have increasingly been the subject of study. Indeed, this research has proved to be extremely important, as it seems possible to anticipate future travel patterns through tourists’ motivations [15, 16].

The diversity of events ends up attracting a multiplicity of tourists with different purposes. This is the case with business tourism, where the main motivation is related to work factors and networking opportunities [17]. As this area of events is of particular interest, several studies have investigated the motivations of its participants [17–19]. Thus, they concluded that although participants spend most of their time at conferences and congresses, an important factor is the attractiveness of the

destination. In addition to this factor, they highlighted the accessibility, quality of accommodation, safety, and climate of the destination [19].

Even though 2020 has seen the transformation of many events to a virtual dimension and despite the many advantages that this format offers, such as cost savings or a higher attendance rate, this transformation does not bring many benefits for increasing tourism in the regions. As a result, the events industry will also have to reinvent itself and come up with alternatives for holding events in what will be the new normal [20].

Although studies on the strategies adopted by the hotel industry in the presence of relevant events are scarce, the reality is that these events are great opportunities to maximize a hotel's revenue. In this sense, there are some strategies that can be put into practice to highlight the presence of the hotel unit [21].

Given that more and more users are using the *internet* to access information about the events they want to attend, it is necessary to strengthen the hotel's presence through this medium [22, 23]. Therefore, to ensure that the hotel capitalizes on the increased flow of tourists, PPC campaigns can be created, for example, that refer to the event, but at the same time capture the user's attention to make direct reservations at the hotel [23].

It is therefore important to design an appealing *landing page*, with a well-defined intention, that grabs the customer's attention and leads them to a certain action. Messages with a sense of urgency can also be added to prevent the customer from postponing their booking, such as offering a discount based on the event in question and mentioning that there are only a certain number of rooms available [22, 23].

It is also important to analyze the search peaks associated with certain events so that campaigns can be prepared in advance. This analysis can be carried out using tools such as Google Trends [22, 23].

Another important aspect is the hotel's coverage of the keywords that users normally use when looking for accommodation. Thus, it is important to invest in a diversified and comprehensive strategy so that the hotel's name appears when searching for hotels near the specific event or the city where it takes place [23].

There is a gap in the existing link between events and hospitality. Although some studies have established this relationship in some way, the existing ones have mostly focused only on sporting events [24, 25]. In addition, the studies that have looked at the subject focus only on the perspective of demand before, during and after sporting events [25], or the influence that major events can have on the *pricing of* hotel units [24, 25]. Corroborating this statement is the study by [26] which has investigated the behavior of the price variable in a large-scale event—the case of *Oktoberfest*.

In the previous studies, it was observed that there is indeed an increase in demand and rates for hotels close to the event venue, which points to the fact that hotels take advantage of the existence of events to implement revenue maximization strategies [23–25].

38.3 Methodology

Although some studies have established the relationship between events and hospitality, most focus on sporting events [23–26]. Furthermore, even those that do not focus on this type of event essentially focus on the influence that large events can have on pricing [23–26].

Even so, the existence of these studies points to the use of strategies by hoteliers to attract event participants. However, these processes are not properly identified, making it pertinent to understand which types of events are likely to be most important in the hotel industry and how the industry is preparing to capture and meet the needs of those attending these events.

In fact, although there are not many studies focusing on the strategies adopted by hotel units in the presence of events in cities, these events are excellent opportunities to maximize a hotel's revenue. As such, it is essential to act in this direction by developing and integrating strategies to highlight the presence of the hotel unit [26].

It would therefore be interesting to understand how hotels in the cities of Lisbon and Porto act in the presence of these events. It would also be relevant to understand whether there is a predominance of *online* strategies, since more and more tourists are turning to the *internet* to get the information they want [26] or whether other more traditional practices continue to be relevant in these situations [27].

The general objective of the study was defined: to understand how events influence hotel *marketing* in the cities of Lisbon and Porto (identify the most important events for the hotel industry in the cities of Lisbon and Porto).

The data show that, before the pandemic, Portugal had a high potential to become a more attractive destination and thus generate more revenue. As a result, some emphasis was placed on the events' industry through the integration of programs to attract corporate events and international congresses, among others [28].

The Portuguese capital quickly became a leader in the MI markets, winning awards in this segment in 2017. As early as 2018, it was anticipated that events such as the *Web Summit* would continue to boost hotel performance indicators, such as RevPAR [28].

As far as the city of Porto is concerned, events have also contributed greatly to the development of the city, to the creation of a favorable image of it, as well as to repeat visits by tourists [29].

For this research, we chose to approach both representatives of event organizers and representatives of 4- and 5-star hotels in the cities of Lisbon and Porto, which is the population under study. Only 4- and 5-star hotels were considered, as it was felt that lower category hotels would be unlikely to have a dedicated *marketing* department.

The sample included four representatives of organizations linked to the organization of events in Lisbon and Porto and seven representatives of hotel units—four from the city of Porto and three from the city of Lisbon, making a total of eleven participants.

Although the number of participants in this study may be lower than the ideal for qualitative studies, it should be borne in mind that most of them are highly knowledgeable and have several years of experience in their roles, which ultimately leads to the acquisition of rich and meaningful data [30]. The sampling technique used in this research is theoretical sampling. This technique is based on identifying individuals with the greatest capacity to respond to the established objectives.

38.4 Results

To carry out a relevant analysis of the interviews carried out, as well as a more direct reading of the results obtained, the specific objectives previously outlined will be considered.

38.4.1 *Identifying Relevant Events*

38.4.1.1 Hospitality Perspective

According to the data obtained in the interviews, the different types of events are of different importances to the different hotels.

Most of the interviewees mentioned that the events that end up having a noticeable impact on their business are mainly business events.

(...) it has a huge impact, especially when we're talking about an urban center that hosts many events, from sporting, musical, artistic, congresses, conferences, professional, closed events to companies... So there's a huge myriad of types of events that take place every year (...) that affect us directly. Having said that, I work for a hotel itself, part of whose business is holding events. It has its own congress center (E2).

The ones that are most important to us are corporate events and also larger events, congresses or conventions in different areas, both nationally and internationally (E3).

(...) festivals, sporting events, cultural events too (...) Congresses too, of course, MICE are also events that often take place in the city and end up affecting us positively, in the sense that they bring us occupation (E7).

However, the participants did mention the importance of cultural and sporting events. In fact, two of the participants (E4 and E5) ended up mentioning that sporting events had the greatest impact on the activity of the hotel unit they represent.

And the ones that have really been a boost for us, in terms of bookings, have been the soccer events (E4).

Obviously, it's not normal now, but I know that the Porto Marathon, I've been told, does have a lot of impact. And Christmas and New Year are always peak times (E5).

These data refutes the lack of evidence supporting a significant influence of cultural events on aspects such as *pricing* or occupancy rate, even when these types of events are organized by hotels [2, 20].

As with cultural events, there has not previously been a strong correlation between the occurrence of festivals, concerts, and sporting events and an increase in ADR and OR in the hotel industry [20]. This was due to the fact that many of these participants stayed with friends or relatives [13]. Even so, these events seem to make a significant contribution to the hotels analyzed, particularly for two of them, according to participants E4 and E5.

This could be explained by the fact that these two hotels have only been open for a relatively short time, and due to the pandemic, these types of events have been among the few to take place in the city of Porto.

We opened our first hotel, in Porto, in March 2019 (...) So there haven't been many events since we opened (E4).

The event we opened for was the Champions League (E7).

However, participants from Lisbon hotels also mentioned the importance of events such as the *Web Summit* and festivals like *Rock in Rio* and *NOS Alive* for their business and the visibility of the destination, something that could be justified by the scale of these events.

So, when it comes to the Web Summit, it's the most popular and it's the one that has also helped internationally to give the destination a big boost. (...) The big festivals have a lot of impact! (...) Whether it's NOS Alive, Super Bock, Super Rock, and even other events along the same lines, of the same size, they can also bring in customers. So, we're winning. In this respect, we, as accommodation, are winning (...) festivals are no longer specifically for an ultra-young audience, in other words, the audience is very varied (E2). Rock In Rio or NOS Alive, or now the MEO Arena, when international groups come, we already feel a movement of customers coming to see the shows. (...) And then there are events like the Web Summit or the congresses of doctors and other such organizations, which attract thousands of people and help to bring in customers. Lisbon is a city that needs events (E6).

38.4.1.2 Events' Organization Perspective

This research considered the views of four interviewees linked to event organizers in Lisbon and Porto. In general, the events considered relevant are in line with those mentioned by the hotel managers interviewed. However, two of the participants added more events, such as the major national and European summits (E9) or the *Porto Rally* and the *La Vuelta* stage, which ended in Porto (E1). In addition, the latter interviewee emphasized the importance of São João, mentioning that it is a distinctive event that positions the city of Porto.

Last year, for example, we saw all the big events canceled in the summer. NOS Primavera Sound, the Porto Rally, a stage of the Vuelta a España that ended precisely in Porto (...) and I also forgot to mention an event, which really sets us apart and positions us, which was canceled last year and this year. It wasn't canceled at our house, but the festivities were canceled, which is São João (E1).

In addition to these, he also highlighted the importance of business tourism in the city of Porto, mentioning that at a certain point, around 2017, it became necessary to invest in this market segment, since in terms of leisure, demand was very organic, and this *corporate* segment could generate a significant economic impact.

(...) those who come here like to come here and so people come here organically. There was a time when we asked a kind of question at the tourist office, “Why did you come to Porto?” and the answer was often “Why shouldn’t I?!” because we really do have a range of assets here, from the climate, to gastronomy, beaches, culture, history, heritage, competitiveness, prices, entertainment, culture, which are really important triggers for people to come here and that’s why we put the promotion of Porto as a tourist location to one side. Because we felt, once again, that people came here organically, and it wasn’t necessary for us to promote it. (...) the good connections we had and the good feedback we got from people was the trigger for people to go back to their cities and countries and say how wonderful the city is and that’s much more relevant (...) than seeing it in a magazine, in an impersonal ad (...) The closeness of the relationships and this non-commercial part, in other words, if anyone who comes here says they really like it, everyone knows they weren’t paid to do it. Simply because they like it, because of the time they spend here, they’ve become a camouflaged ambassador for Porto. And that’s why we’re starting to channel more money into corporate tourism (E1).

38.5 Conclusion

Regarding the events that take place in the cities and which are most relevant to the hotel industry, most of the interviewees said that business events are the most important for the hotel industry, while sporting events were also very relevant for some participants.

The data collected in the interviews are in line with the information presented in the literature review, which mentions that business events are of vital importance in cities, due to the economic impact they can generate, and because they address the issue of seasonality [12, 14, 31–34]. From the hoteliers’ point of view, sporting events also generate a large influx of participants, which ends up having a positive impact on hotel business. This perspective is also in line with the literature review. Although sporting events can be short-lived, their effects can be prolonged due to the flow of individuals—participants and spectators [35, 36].

Even so, some relevance was given to cultural and entertainment events, especially events such as the *Web Summit*, *NOS Alive*, and *Rock in Rio*. These results provide evidence that cultural events can have an impact on hospitality and refute the initial idea that music events might not have a major impact because attendees of these events seek other types of accommodation [13]. However, the impact of these events may be directly related to their size and the specific audience they attract.

However, the importance of cultural and entertainment events was more emphasized by representatives linked to the organization of events, confirming that events such as the São João festivities end up really positioning the city, but they attract

the resident population much more than tourists, not exerting much relevance on the hotel industry [1, 14, 33, 34].

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Chapter 39

Entrepreneurship and Covid-19: The Entrepreneurial Challenge in a Global Pandemic



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Abstract The purpose of this study is to analyze the most relevant factors affecting the development of new businesses that have been set up during the covid-19 pandemic. The main challenges in the entrepreneurial phenomenon are identified in this study, which represent an immediate contribution to the discussion on the development and economic evolution, emphasizing the impact of creativity, innovation, and entrepreneurship in sudden health emergencies. For this purpose, descriptive research and literature reviews were done, where the years 2019–2020–2021 were contrasted. The growth and decrease of taxpayers in the mentioned periods were analyzed with the support of the Internal Revenue Service (IRS) during the opening, closing, and suspension phases. Therefore, the researchers analyzed the factors that contributed to the decline of small and medium businesses in Ecuador during the health crisis.

39.1 Introduction

Today, small and medium-sized companies play a significant role in the market, mainly because they contribute to the creation and development of employment opportunities in societies and fulfill their business activities. Therefore, since their creation, small and medium-sized companies have been one of the main sources of

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local and national economic prosperity, given that their productive activities have had a great social contribution and have been affected during the crisis [1].

Theoretically, the image of entrepreneurs constitutes a basic element of the economic system, given that the creativity and nature of entrepreneurs are characterized by risk taking. At the historical moment arises decisive innovations for the economic development of a country. Empirically, Ecuador and Latin America face a high level of entrepreneurship with very low-quality levels, mainly due to the inclusion of new companies in the informal economy.

There is no doubt that Small Medium Enterprises (SMEs) are one of the business sectors most affected by the pandemic; at the same time, these organizations play a vital role in providing basic goods and services to people in times of crisis. The main business challenge in the covid-19 era is the financial impact, which is related to the decrease in international and domestic demand. Therefore, their economic income, the difficulties to obtain financial credit, and the various conflicts to acquire or not imported materials reduce the employability and productivity of talents.

However, for organizations, this situation is considered critical and not favorable for sustainability; in other words, due to lack of working capital, low competitiveness, low-capacity utilization, internal and external costs have decreased. External demand, rising unemployment, and falling exports have put pressure on the increasing bankruptcy of companies. This leads to lower production lots, economies of scale, loss of reach and learning. All of these have a negative impact on variables such as employment, wages, and income distribution. Therefore, companies of all sizes are affected, especially the tourism, service, and trade industries [16].

The research helps to find opportunities for improvement, since as companies contribute to economic development, they are likely to be able to reinvent themselves nationally and regionally by opting for digital marketing or home-delivery commerce. By analyzing the reasons and effects of the closure of such organizations, a precise inquiry can be made about the consequences and effects on the local economy, which until now have been uncertain.

Reference [10] states that small and medium-sized businesses will have no future without state support. State support includes many issues, including strong public spending that provides liquidity, tax incentives for many companies. From a business perspective, this epidemic involves the injection of capital, but the challenges of innovation and creativity are equally important. The expansion of covid-19 in these past months has made the stock market unstable, having a serious impact on the development of the global economy.

39.2 Development

In the predictions of almost all commercial, industrial, and service organizations, covid-19 is a dark smoke that does not allow to clearly see the future of the economy, which is an inevitable fact. No one predicted that the year 2020 would bring several problems such as travel cancelations, panic buying, factory closures, social isolation,

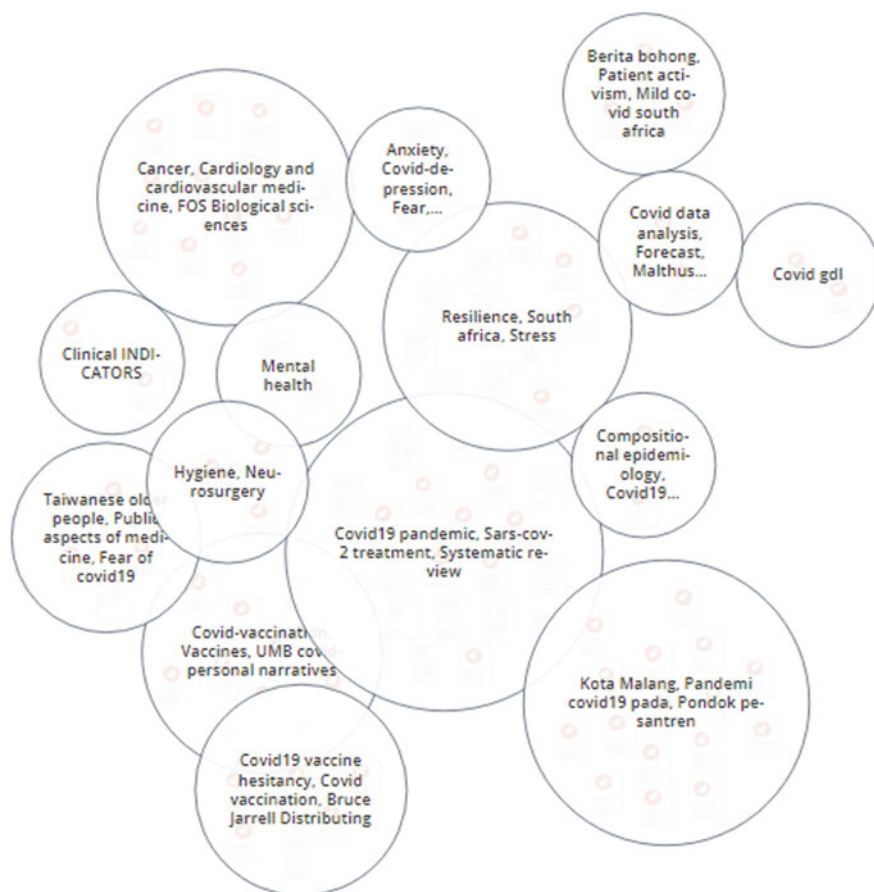
saturation of medical services, online shopping, and services, telecommuting, and a massive increase in the number of unemployed populations. Generally, no one expected a pandemic and the complications that it demanded. If it can be anticipated, then it seems that after such a major disaster, a new reality has emerged. This scenario provides opportunities for conversion, modification, and improvement of routines and processes. Businesses play a fundamental role in changing society and in establishing this new normality, and entrepreneurs are reinventing activities that will allow them to generate income [2].

39.2.1 Covid-19 Pandemic

Since ancient times, mankind has experienced a series of epidemics, such as the plague of Athens, the Bubonic plague, or the Black Death among others that have occurred at different times in history. The outbreak of severe respiratory disease in Wuhan, China, was identified for the first time in December 2019, describing it as a disease called covid-19 caused by a virus called SARS-CoV-2, and its spread was already unstoppable.

On the economic side, the productive system has been partially paralyzed, where only the basic necessary sectors such as food, health, pharmaceuticals, and chemicals could produce, which caused the interruption of income of the companies where the payment of salaries, payment of basic services, and financial expenses were complicated. Due to the lack of business reactivation policies on the part of the State, payments for services began to be delayed, with the possibility of bankruptcy, causing greater unemployment and breaking the chain of payments [13].

A graphical model is established that makes specific all the areas of the variable:



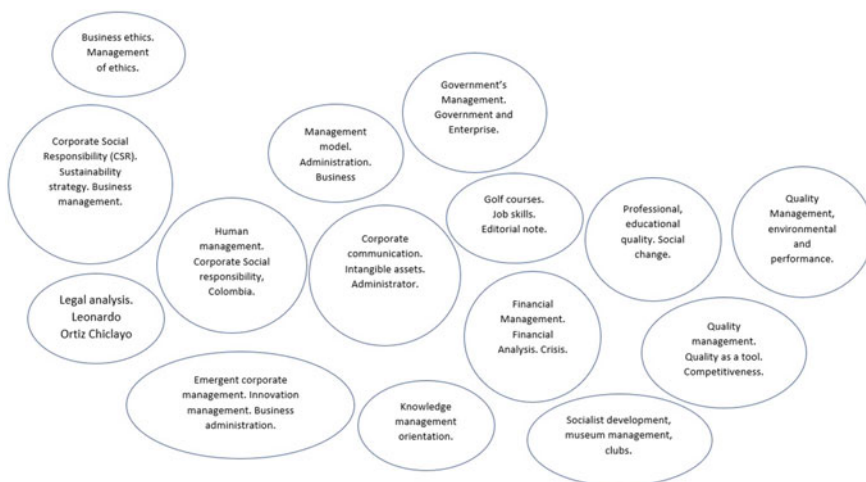
Source Open Knowledge Maps (2022). Overview of research on covid-19. Retrieved from <https://openknowledgemaps.org/map/70a9f00d99dfe256093983e272b1f5f7>

39.2.2 Business Management

Since the beginning, business management has been the focus that is responsible for identifying and determining in companies various strategies that pursue their growth, being able to take on the challenges of today's competition, which will allow survival in globalization, being one of the biggest trends, which acquires relevance in the approach to customer experience [15].

Rodríguez and Albizuri [21] say that it is important to know that the effects of this crisis on the world economy are impossible to predict, given the uncertainty about the progress of the pandemic, which is why numerous national and international organizations have created contingency plans that in any case anticipate a fall in

Gross Domestic Product (GDP). To face the current situation, business management must consider a variety of indications to guide and orient entrepreneurs and managers of organizations such as: communication with customers, operations, cash flows, and human talent management.



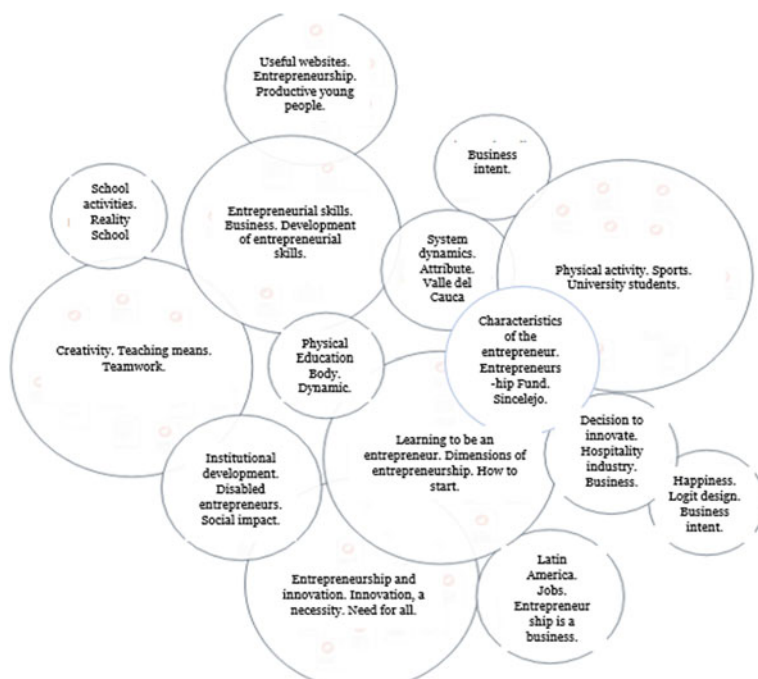
Source Open Knowledge Maps (2022). Overview of research on gestión empresarial. Retrieved from <https://openknowledgemaps.org/map/db84a5f7a7a0ab021b8bb29c5681826a>

39.2.3 Entrepreneurship

The term “entrepreneurship” comes from the French “entrepreneur” which means pioneer and refers to a person characterized by buying products at a certain price to sell them on the market at unknown prices. It is also known that entrepreneurs are directly involved in the balance of supply and demand although currently its use is limited to refer to a new project or a new company that starts a person or group of people with a differential plus, which makes the product or service unique [17].

The pandemic has influenced entrepreneurship in an accelerated way where the lack of jobs and other income alternatives may have made more people to start their own business in 2020 and 2021.

If new businesses are referred to as innovative or not, it is necessary to analyze in business terms that innovation is usually understood as the introduction of new products or services, or in the use of new technologies or processes [4]. New businesses can be ideally positioned for one or both, as they have no commitment to existing products or services and can adopt the latest technologies if they have enough access to knowledge and financing.



Source Open Knowledge Maps (2022). Overview of research on empreneur. Retrieved from <https://openknowledgemaps.org/map/62dbe59e9252aba11ec62c009296a3dc>

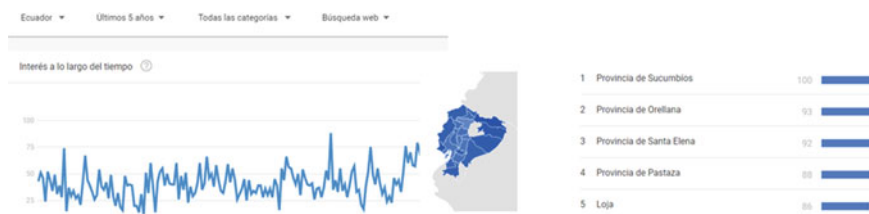
39.2.4 Technology

Today's society is linked to technology, and this is immersed in everyday life, but do we really know what technology is? Several authors agree that it comes from the Greek term "Techno" which means technique, skill, ability, which is commonly determined as practice; and on the other hand, the term "logy" whose concept is: science, knowledge, and study, which is usually called theory. Technology brings great discoveries that improve quality of life, improve production, save time, shorten distances, all these to achieve a solution that allows human beings to solve a conflict or satisfy a need in a specific area [7].

This made social networks almost universal (90.6%) of the population over 5 years of age. As for e-commerce, 9.2% of companies have online sales options, and 9.7% of people buy and pay bills through online sources, indicating that it is a method that is still developing in the country.

These events made it clear that people are adaptable and look for ways to meet their needs. The challenge for companies in today's world is to provide products and services under these new health standards, which means modifying their value

propositions and adapting them to the present, personalized, intelligent, and fast, where technology plays an important role. Organizations must develop digital skills to continue to run normally despite post-pandemic restrictions.



Source <https://trends.google.es/trends/explore?date=today%205-y&geo=EC&q=Emprender>

39.3 Methodology

This research met the characteristics of the quantitative approach, due to the fact that theoretical perspectives were explored, described, and generated through digital field research linked to the Internal Revenue Service (IRS), in order to obtain accurate numbers for the years 2019–2020–2021, for the right study. Also, the basic modality of the research was explanatory since the event is considered a social-economic phenomenon experienced by mankind. The study is retrospective longitudinal because it takes as reference the years of the pandemic.

39.4 Results Analysis

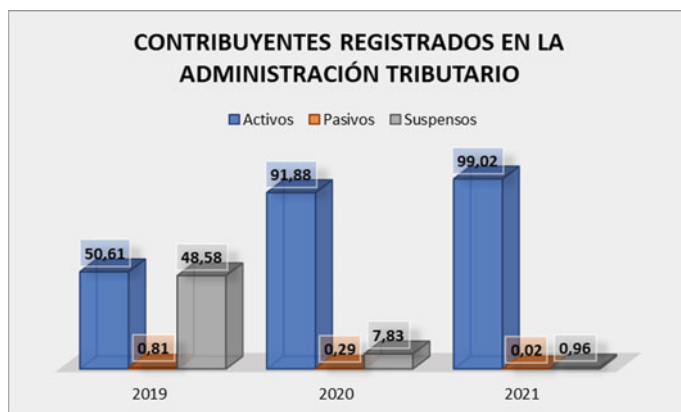
Once the theoretical review of the research has been carried out, it can be described that the characteristics of small and medium enterprises were closed down by the pandemic in Ecuador; such information has been identified from record results at the website of the Internal Revenue Service (IRS) in the statistical section of economic activities during the period 2019, 2020, and 2021. Then, it was determined that in 2019, 225,917 taxpayers were registered in various activities assigned by this administration, versus the total of passive and suspended registrations of 220,430 taxpayers in relation to 2020 that decrease with a total of 168,619 and 1491. The following table shows that the first six months in 2021, there are 38,516 active taxpayers and 383 passive and suspended taxpayers (Table 39.1).

The data obtained from the multidimensional statistics of the tax administration establishes the percentage distributed of the taxpayers' status by year in each of the periods under study (Fig. 39.1).

Table 39.1 Economic activities based on RUC (Taxpayer Identification Number—TIN)

	2019		2020	2021
	225.917		168.619	38.516
Liabilities	3.602		539	8
Suspended	216.828		14.372	375
Total	446.347		183.530	38.899

Source Multidimensional statistics Internal Revenue Service 2021

**Fig. 39.1** Taxpayers registered with the tax administration

Likewise, when performing an analysis by year and by state of each of the tax regimes, in 39% there was a decrease in the registration of new businesses in reference to 2019 which was 52%, although in 2021 until March it amounts to 9%, as shown in Fig. 39.2.

In the analysis of the economic activities registered with the tax authorities, the top five activities were personal services, retail sales in non-specialized stores, restaurant and mobile food service activities, livestock, and retail sales of other products in specialized stores, as shown below:

When analyzing the end of activities, it is established that out of 100% of the RUC (Taxpayer Identification Number—TIN) registrations canceled, whether, in passive or suspended status in the tax regimes, it is established that the economic activities that had a higher incidence in 2019 represented activities without the specification of International Standard Industrial Classification (ISIC) with 75.75%, and for 2020 and 2021, it is given in other personal services' activities with 22.07% and 22.44%, respectively.

For the purposes of this research, Ecuador is a middle-income economy. Table 39.2 describes the countries that are part of this category, along with the indicators related to business activity in the different stages of an enterprise in times of pandemic, considering the countries of Latin America and the Caribbean.



Fig. 39.2 Entry of new taxpayers, Internal Revenue Service, March 2021

Table 39.2 Business activity indicators

Country	Emerging	New	Established businesses	Business closure	Business continued
Ecuador	26.9	10.8	14.7	5.9	3.4
Colombia	15.3	7.3	4.3	4.2	1.4
Brazil	8.1	15.8	16.2	4.8	1.4
Mexico	2.3	4.2	8	2.6	1.2
Guatemala	11.2	14.6	14.8	4.3	1.7

Source Global Entrepreneurship Monitor, Ecuador

Created by Llamuca Silvia

39.5 Conclusions

The global economic crisis caused by the covid-19 pandemic has certainly caused many companies to close their doors. This study shows that, due to difficulties, many companies have closed in Ecuador. Therefore, analysis shows that 18,870 companies suspended their activities last year due to the current health emergency. These data were gathered from the statistics provided by IRS that belong to different economic areas such as commerce, services, and manufacturing throughout the country.

One of the most important and concerning impacts of the problems the world is currently experiencing is the economic crisis and the financial problems of the entire country. There will not be a good economic performance. All sectors are affected, such as small, medium, and large companies distributed in the food industry, hospitality, entertainment, industrial sector, construction, agriculture sector, tourism, etc., which in turn face short-, medium-, and long-term effects.

The pandemic has caused a crisis, from an evolutionary perspective, it is possible to consider it as an extreme conflict, leading to polarization of economic entities on how to deal with this problem, and however, if a consensus is reached, it is possible that it could lead to a competitive advantage.

Finally, new companies in Ecuador and around the world are one of the most active factors in the economy, as they stimulate productive activities that provide more added value, economic, and social development. Financial capital constitutes a fundamental axis in the progress of all companies, as well as in long term economic growth. The employer of all its dimensions is creative, the value of the creators, the technological innovation tool will allow the market trend, always observing and studying which are the strategies that will allow the reactivation of the whole financial sector, an event that was caused by the covid-19.

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Chapter 40

Educational Practice: The Domain of Curricular Autonomy (DCA) at Fontes Pereira de Melo School



Ana Ferreira and Marta Villares

Abstract The present article revisits a discussion about the Curricular Autonomy Domain within the context of Portuguese education. Curricular Autonomy is a concept that essentially represents changes in methodology and assessment. One should question if it is a reachable practice and if schools are able to implement the necessary changes. In Portugal, the changes in education policies arose after the revision of the Basic Law of the educational system of 2009, especially through the (Decreto-Lei n° 55/2018 de 6 de julho. Diário da República n° 129 - Série I. Ministério da Educação, Lisboa), that “establishes the curriculum of basic and secondary education and the guiding principles of learning assessment”. This document determines the implementation of the Curricular Autonomy Domain in schools, starting in the school year 2018–2019. However, its implementation has not been consensual, and four years later, its implementation and effectiveness in terms of learning are still questioned. Although all teachers recognize the major changes and the need to adapt teaching practices to a new generation of students, they are not always able to identify the best ways to meet the students’ demands in a global world where knowledge should be seen in an integrated perspective. The main goal of this work is to understand to what extent students and teachers consider the development of teamwork projects’ determinant in the success of teaching, understanding the interdisciplinary approach as a key resource to appropriate knowledge. In fact, if interdisciplinarity is considered essential for the learning process, then project work can be an appealing tool for students, motivating them to research and questioning, essential conditions for successful learning. Thus, in a perspective of inclusion in education, we ask

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ourselves about the effect that the Domain of Curricular Autonomy may have on students' learning, which activities are being introduced/implemented and what is the effectiveness/relevance that students and teachers attribute to these Domains of Curricular Autonomy (DCA). To carry out this study, a questionnaire was applied to teachers and another one to students from the 5th to 12th grade, from the elementary and secondary school Fontes Pereira de Melo, in Porto. The goal was to assess the effect that the proposed activities in the DCA have on learning and how the Domains of Curricular Autonomy are integrated in teaching practices. In order to enrich the study, one conducted a survey to understand the teachers' position regarding the implementation of the DCA in their teaching practice.

40.1 Introduction

The Portuguese educational system assumes as a priority the development of an inclusive school, promoting better learning for all students and the operationalization of the skills' profile they should develop. Furthermore, to enhance the exercise of an active and informed citizenship throughout life [2], presents the Domain of Curricular Autonomy (DCA) that aims to give schools autonomy for a curricular development, appropriating it to specific contexts and their students' needs. This area of curricular autonomy presupposes an integrated management of knowledge, valuing the disciplinary knowledge, but also the interdisciplinary work, the diversification of procedures and assessment tools, the promotion of research skills, relationship, analysis, the field of presentation and argumentation techniques, the ability to work cooperatively and with autonomy.

Thus, it is essential to consider the curriculum an instrument which schools can manage and develop locally so that all students achieve the competences foreseen in the profile of students leaving compulsory education, i.e., that each school can counteract the main factors of failure, adopting appropriate solutions to the contexts and the specific needs of their students.

To examine the outcomes of the curricular autonomy, this study pursues the following questions: (1) How do teachers respond to the new Curricular Autonomy Domain? (2) How does enhanced curricular autonomy affect the school practice? (3) What do students think about it?

40.2 Theoretical Framework

The current educational system in Portugal is supported by the [5] which establishes the general framework of the educational system. This Basic Law of the Education System presents the guiding principles of the whole educational system and defines its objectives, assuming as a priority the implementation of an education policy focused

on people, that ensures equal access to public school, promoting educational success and, in this way, equal opportunities.

However, in 2017, and following the recognition of the evolution of society and in particular the multiple challenges that have been posed to the individual, it has become necessary to consider how the educational systems can contribute to the development of values and skills that enable students to respond to the complex challenges of this century and cope with the unpredictability resulting from the evolution of knowledge and technology.

In this context, the school will have to reconfigure itself to meet the demands of times of unpredictability and change, which implies changes in teaching and didactic practices in order to adapt the globality of educational action to the purposes of the profile of student competencies.

In order to achieve these purposes, the [2] appears where it is stated that “the available data show that those objectives are not, yet fully achieved, to the extent that not all students are guaranteed the right to learning and educational success. On the other hand, society is currently facing new challenges, arising from globalization and technological development in acceleration, having the school to prepare students, who will be young people and adults in 2030, for jobs not yet created, for technologies not yet invented, for the resolution of problems that are still unknown” [2]. This allows us to say that the tutelage shows a great concern so that today’s school meets the real needs of a society in continuous construction.

In an analysis of recent changes to education policies [12], one highlights that, although with varied impacts and diverse appropriations, a wide range of dimensions emerge, invoking decentralization, school autonomy, and flexibility.

Following this tendency, this Decree-Law is based on three main guiding principles: autonomy, curricular flexibility, and inclusion; it deepens the concept of articulation and interdisciplinarity with the implementation of areas of curricular autonomy and incidence on project work with the involvement/participation of areas of knowledge; and assessment is understood as a collection and sharing of information, in the formative and summative modalities, applying a variety of instruments, appropriate to the different recipients, the diversity of learning, and the contexts in which they occur.

The aim is to build a school that can get away from the role of transmitting knowledge and that teaches to have a global conscience, in which the student at the same time works on his individual formation and his community conscience. To create a school that gives priority to cooperative and collaborative work instead of individual work. To build a school that works on critical spirit, creativity, and autonomy from an early age, so that students can have confidence in their choices and make them consciously and thus improve their learning, the learning of all their colleagues and “teach” teachers to teach them.

To this end, the same Decree-Law states that “the achievement of significant learning and the development of more complex skills presuppose time for consolidation and an integrated management of knowledge, valuing disciplinary knowledge, but also interdisciplinary work, the diversification of assessment procedures and instruments, the promotion of research skills, relationship, analysis, the domain of

presentation and argumentation techniques, the ability to work cooperatively and with autonomy” [2] so that, and also according to the same document, “schools are challenged, (...) to (...) be able to (i) have greater flexibility in curriculum management, with a view to stimulating interdisciplinary work, in order to deepen, strengthen and enrich the essential learning; (ii) implement the citizenship and development component, as an area of work present in the different educational and training offers, with a view to the exercise of active citizenship, democratic participation, in intercultural contexts of sharing and collaboration and confrontation of ideas on current issues; (iii) to encourage students to develop research, evaluation, reflection, and critical and autonomous information mobilization skills, with a view to solving problems and reinforcing their self-esteem and well-being; (iv) adopting different ways of organizing school work, namely by creating educational teams that make the teaching work more profitable and focus it on the students; (v) investing in the promotion of project work and in the development of communication and expression experiences in oral, written, visual, and multimodal modalities, valuing the students’ role as authors, providing them with significant learning situations; (vi) strengthen the dynamics of learning evaluation focusing them on the diversity of instruments that allow a greater knowledge of the effectiveness of the work done and a follow-up at the first sign of difficulty in the students’ learning” [2].

In this sense, the mentioned Decree-Law “establishes the curriculum of basic and secondary education, the guiding principles of its design, operationalization and evaluation of learning, ensures that all students acquire the knowledge and develop the skills and attitudes that contribute to achieving the competencies set out in the Profile of Students Leaving Compulsory Schooling” [2] and, paragraph e) of Article 3 defines, among others, the “Domains of curricular autonomy” (DCA), as “areas of confluence of interdisciplinary work and/or curricular articulation, developed from the basic curricular matrix of an educational and training offer, with reference to the curricular documents, as a result of the exercise of autonomy and flexibility, being, for this purpose, summoned, totally or partially, the times intended for curriculum components, subject areas and disciplines” [2].

This aims to be an instrument at the service of a coherence within the educational system that allows achieving the profile of the students exiting compulsory schooling, a document that sets out what it is intended that young people achieve at the end of compulsory schooling. According to this document, the students of this generation build and consolidate a scientific and artistic culture with a humanistic basis. “To do so, they mobilize values and skills that enable them to intervene in the life and history of individuals and societies, to make free and informed decisions on natural, social, and ethical issues, and to have a capacity for active, conscious and responsible civic participation”.

These areas of curricular autonomy (DCA) are in line with the guiding principles of educational action expressed in Article 4, which, in paragraph i), highlights the “valorization of the interdisciplinary and articulated management and teaching of the curriculum, particularly through the development of projects that bring together learning from different subjects, planned, implemented and evaluated by all teachers of the class council or school year” [2].

In summary, the DCA, in an intersection of learning from different disciplines, explores pedagogical and didactic paths, in which practical and/or experimental work and the development of research, relationship, and analysis skills are privileged, based namely on

- The themes or problems approached from disciplinary perspectives, in an interdisciplinary approach.
- The concepts, facts, relations, procedures, skills, and competences, in its transversality and disciplinary specificity.
- The textual genres associated to the production and transmission of information and knowledge present in all disciplines.

Thus, the Common European Framework is one of the options to enrich curricular planning, through proposals for interdisciplinary work, in which students are led to a meaningful learning against the memorization process. It is important, however, to understand what the position of Portuguese teachers is toward this autonomy and the practices to be implemented, because according to [5] “contrary to the widespread belief that teachers want more autonomy to customize their curricula to meet the needs of the students, (...) teachers did not look favorably on the reinforcement of curricular autonomy nor did they believe that it would diversify the school”.

Education scholars and practioners argue that teacher’s autonomy has a great value in education. They argue that schools should take more active and creative roles in constructing curricula and organizing learning experiences for their students [10]. This autonomy is associated with a collective effort among teachers to work together to synchronize the scope and sequence of the school-wide curriculum, which requires communication and collaboration among them.

Empirical studies, however, have demonstrated that teachers may not welcome more curricular autonomy and that autonomy may not produce desirable consequences in practice, what support the notion that, as [9] points out, teachers’ autonomy is both “resolution and problem”. That is, one cannot simply assume that teachers prefer more curricular autonomy and would use it to develop localized, student-centered curriculum. Rather, seemingly enhanced autonomy could lead to complicated, often unexpected, results in practice [5].

According to [7], students in OECD countries and economies receive an average of 7638 h of compulsory instruction during their primary and lower secondary education, ranging from 5 334 h in Poland to almost double that in Australia (11,060 h). Portugal is in ninth place, with a total of 7934 h 5429.4 of them in primary and 2505 in lower secondary education.

In addition, on average across OECD countries and economies, instruction in reading, writing, and literature and in mathematics represents 42% of compulsory instruction time for primary school students and 27% of compulsory instruction time for lower secondary school students [7].

Providing instruction in formal classroom settings accounts for a large portion of public investment in education. Almost all countries have statutory or regulatory requirements regarding hours of instruction. These are most often stipulated as the

minimum number of hours of instruction a school must offer and are based on the understanding that sufficient time is required for good learning outcomes.

Understanding which the best practices are to achieve better results from such a long period of life at school thus becomes essential, both in the opinion of teachers and students as the main actors of their own learning.

Although one can find some references on the position of university students on curricular autonomy and the associated work proposals, one cannot find any bibliographic reference on the opinion of primary and secondary school students on curricular autonomy and its pedagogical implications.

40.3 Methodology

This study is based on a theoretical approach set on the literature review with the goal of systematizing the legal framework that supports the Portuguese Educational System, to evaluate the impact of curricular autonomy on the success of the teaching–learning process of primary and secondary school students.

In this research, a sample questionnaire to 469 students and 31 teachers was implemented at Fontes Pereira de Melo School in Porto. The questionnaires, applied in February 2022, as a Google Forms, are slightly different but both are divided into two parts: in the first part the identification of the respondent, as age, gender, schooling level taught. In the second part, one questions the subjects that normally use this working methodology and which competences/abilities are enhanced. The students were also asked about the effect of this teaching–learning methodology on their educational success and final grade. The analysis of the results, made with the IPSS application, allowed us to determine the importance of DCA in all the processes of teaching–learning and in particular the teachers and students’ opinion about its importance in the students’ success. To complement the study, another survey was conducted, to understand the teachers’ position regarding the methodologies for the implementation of the DCA in their teaching practice.

40.4 Legal Assumptions and Teaching Practice

To reflect on the educational system is, above all, to think about the curricular proposals and teaching practices, but, as mentioned before, these ones have to reflect the great changes of this century. In fact, the great current challenge is the growing search for innovative methodologies that enable a pedagogical practice able to overcome the limits of purely theoretical and traditional teaching, to effectively achieve the training of the subject as an ethical, critical, reflective, transforming, and humanized being. In fact, if many teachers still resist these changes in pedagogical practices due to the traditional style so strongly rooted (due to the need for systematization of the educational system), they do not fail to recognize the requirement and need

to implement the change/transformation process. However, the uncertainty about how to make the required deep changes effective is aggravated by the difficulties in the articulation and collaborative work among peers, in a proposal's design to share options that allow students to become more autonomous and at the same time help them to become active citizens with the capacity to intervene, predict, and solve problems.

Aware of this urgency arises the areas of curricular autonomy in a normative proposal to reassess ways of doing and applying the differentiation/flexibility of the curriculum and learn ways to readjust and reconcile the different pedagogical practices. The goal is to make learning as meaningful/contextualized as possible for all students based on the curriculum matrix and the essential learning.

The school in Portugal is gradually and cautiously implementing this whole process of change and, as a way of evaluating the impacts of this change, we present as case study the reality of the Fontes Pereira de Melo Elementary and Secondary school (EBSFPM).

40.5 The Domain of Curricular Autonomy at EBSFPM School

The Fontes Pereira de Melo School Grouping began in the school year, 2018/19, the implementation of the DCA, in the early years of the different learning cycles, through the implementation of pedagogical projects. The aim was to make the application of these in all years of schooling possible and ultimately, in the possibility of building cross-cutting projects between cycles of education, taking into account the increasing complexity of knowledge to be acquired by students, in addition to the intention to take the opportunity of the Decree-Laws under discussion (54/55 of 2018) to create specific teaching strategies, individual or group, given the learning pace and specificities of students who may benefit from them.

This process of change is coincided with the celebration of the 50th anniversary of EBSFPM, so the Pedagogical Council is defined as the theme for the activities to be developed in this area "Sources, Communications and Environmental Sustainability". This theme was addressed across the board by all classes of 5th, 7th, and 10th years of schooling. Each disciplinary group was in charge of choosing the type of approach to be preferred at each level of schooling, involving various areas of knowledge and disseminating the final product. It constituted, in this way, a way of making the students authors of significant learning situations and a way of showing the educational and local community the final result. The integration of these activities was carried out in phases, being extended in the school year 2019/20 to the students of the 6th, 8th, and 11th years, and in the year 2020/21, all classes of the school have carried out activities in the DCA, being now the responsibility of each class council to define the themes to be addressed. Under the DCA, several and diverse projects are developed, some of them in partnership with external entities,

citing as an example, the Porto City Council, the University of Porto and Dr. António Cupertino de Miranda Foundation.

The implementation of the DCA, school year, 2019/20, in the early years of the different learning cycles, through pedagogical projects has aimed to make it possible in all years of schooling and ultimately in the possibility of becoming transversal between cycles of teaching and learning, considering the increasing complexity of knowledge to be acquired by students. Furthermore, it is intended to seek that the school culture invests and integrates, in its structuring documents, a process of curricular and pedagogical transformation/development that is more humanistic, cooperative, and social and to take the opportunity of the Decree-Laws (54/55 of 2018) to create specific teaching strategies, individual or group, given the learning pace and specificities of the students who may benefit from them.

Teachers have already started to become aware that there has to be, in some way, a rupture with the usual past of presenting students with a curriculum and the respective closed and isolated assessment. The rapid and constant social changes require a change in practice according to the students' knowledge in all its essence, as foreseen in the students' profile at the end of compulsory schooling.

So now, we will present some reflections on the results obtained from the student and teacher surveys. Our sample comprised a total of 469 students from the 5th to the 12th year of schooling, regular and vocational education and 31 teachers distributed by these levels of education.

40.5.1 Results

a. Students

As we can confirm by analyzing Table 40.1, our sample comprised a total of 469 students of the Fontes Pereira de Melo Secondary School, in a universe of 1149 students, from the 5th to the 12th grade, i.e., it represents more than 40% of the school's students.

Of these, most attend grade 10 and 11 (18.1%), and only 6.6% attend grade 5 (Table 40.1).

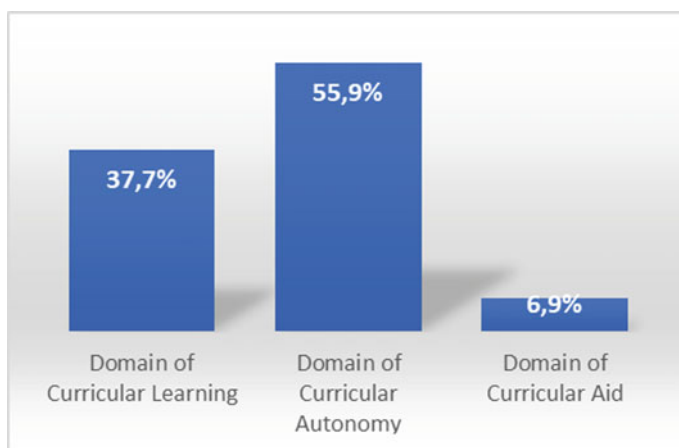
These students were asked about the meaning of the acronym DCA, and according to the data in the graph in Figs. 40.1 and 40.2, we may conclude that about 56% of the respondents associate the acronym DCA, with the Domain of Curricular Autonomy. However, 37.7% think that the acronym means Domain of Curricular Learning and 6.4% think that the acronym means Domain of Curricular Aids. Moreover, about 44% of the surveyed students do not know what it means.

The next question is referred to the students' understanding of the objectives of the DCA. As we can see from the analysis of the graph in Fig. 40.3, most students (43.3%) considered that the aim of the DCA is "to make classes more dynamic and develop the ability to work in groups" and 28.6% of the students considered that the aim of the DCA. is "to develop in a dynamic way the necessary skills in the students'

Table 40.1 Individual profile of respondents

Students/school year	Frequency	%
5th	31	6.6
6th	51	10.9
7th	51	10.9
8th	72	15.4
9th	55	11.7
10th	85	18.1
11th	85	18.1
12th	37	7.9
Total	469	100.0

Source Own elaboration

**Fig. 40.1** Meaning of DCA. Source Own elaboration

profile at the end of compulsory education (12th grade)". We also highlight that 104 students (1%) refer that the main objective of these domains is "to increase the final results".

For the achievement of these objectives, most students refer that the subjects that most promote work in the DCA are the ones that integrate Social Sciences and Humanities, such as Geography and History, followed by the subjects within Science (27%) (Fig. 40.3). The subjects that least propose activities/tasks within this domain, according to the students' opinion, compose the Language and Technology departments (15% each one).

Naturally, from the students' point of view, the importance of this domain is measured in terms of results because, as we have mentioned, 1% of the students still consider that their only aim is to increase their own results. Therefore, as we can see from the graph in Fig. 40.4 of the 462 students surveyed, 80.3% recognized a

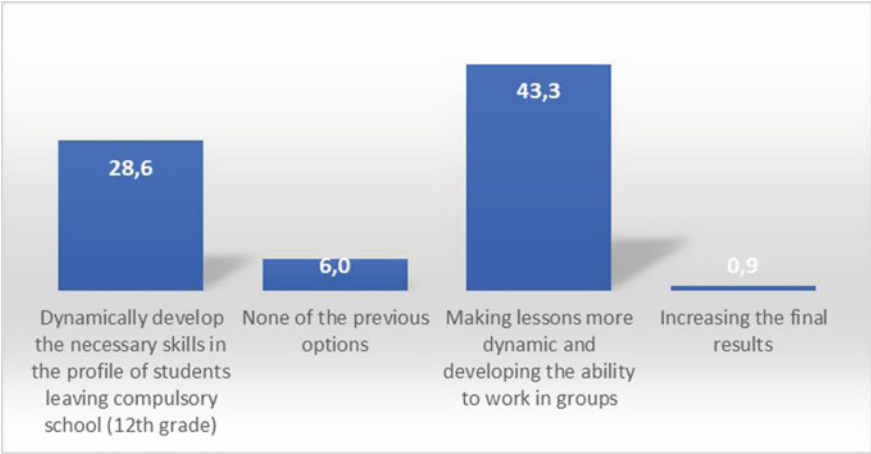


Fig. 40.2 Main goals of DCA. *Source* Own elaboration

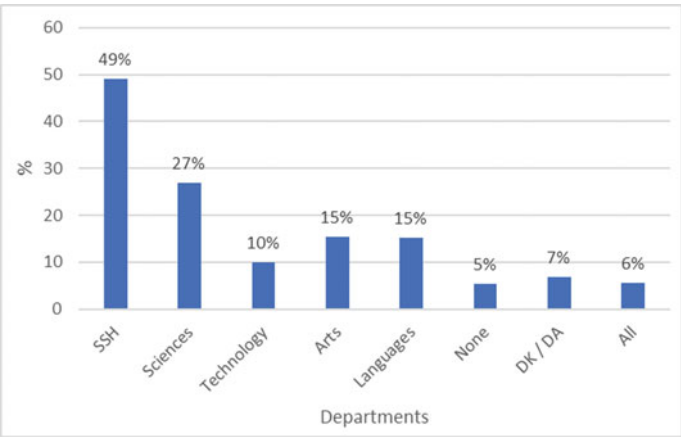


Fig. 40.3 Subjects that most promote DCA. *Source* Own elaboration

positive effect on their final grades; 1.3% mentioned a negative effect, and 18.4% consider that there was no impact on the results.

This finding is particularly important if we bear in mind that, when the central question is about the skills developed rather than the marks obtained, of a total of 452 students, 52.3% answered that they felt progress in their ability to work in groups; 4.9% increased their sense of leadership; 9.5% felt more autonomous; 16.2% learned to respect their colleagues’ opinions better; 8% felt more responsible; and 1.5% showed that they were developing empathy for others. In short, we can conclude that the DCA work demonstrably develops the relational and behavioral skills of our students (Fig. 40.5).

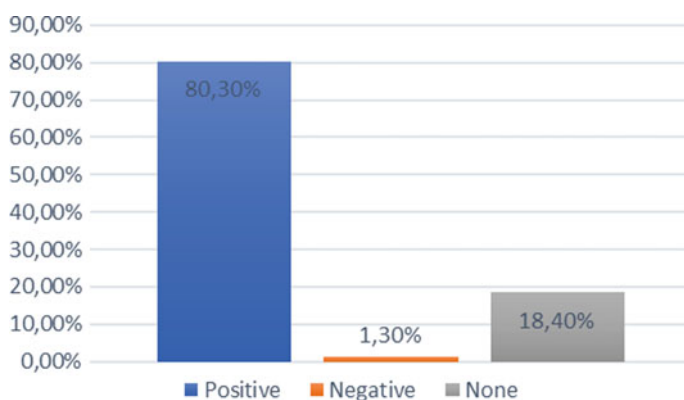


Fig. 40.4 Effects of DCA activities on final grade. *Source* Own elaboration

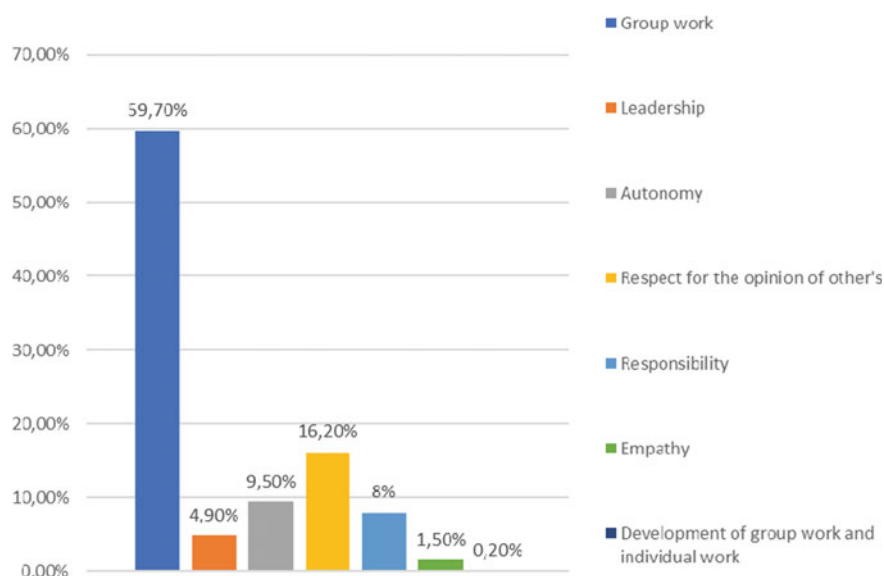


Fig. 40.5 Skills developed through DCA activities. *Source* Own elaboration

The analysis allows us to present a positive final balance despite also presenting paths for improvement; therefore, it was important to question teachers, agents in charge as proponents and moderators of the whole process.

b. Teachers

According to Table 40.2, we can state that the teachers who took part in the sample (31 respondents) represent the various departments, but not in the same proportion. In fact, the most representative department was languages (32.3%) and the least

representative were teachers of Social Sciences and Humanities or Technologies (12.9% and 9.7%, respectively).

Naturally, these teachers teach at different levels of schooling, with most of the respondents being from the 3rd cycle (39.0%). Also, according to Table 40.2, 24.4% of the teachers who replied to the questionnaire teach vocational education.

The teachers refer that the competence that students develop most with this domain is teamwork (50%), developing soft skills (35.7%). Interestingly, no teacher recognizes the importance of DCA work in developing leadership skills (Fig. 40.6).

When we questioned teachers about the main objectives of the development of the DCA (Fig. 40.7), enabling teamwork (27.6%), exploring concepts, facts, relationships, and skills in general (23.7%), and learning to exchange and respect opinions (21.1%) stand out.

Thus, most teachers consider that DCA activities should constitute a tool for student assessment (65.6%) and 3.4% consider that these activities should be integrated into a broader assessment instrument. Interestingly 27.6% of teachers consider that DCA should not be reflected in the assessment of their students (Fig. 40.8).

Table 40.2 Teachers' profile

Teachers		Frequency	%
1. Teaching Level	2nd cycle	31	17.1
	3rd cycle	51	39.0
	Vocational secondary	51	24.4
	Regular secondary	72	19.5
2. Curricular Department	Languages	10	32.3
	Social Sciences and Humanities	4	12.9
	Technology	3	9.7
	Arts	6	19.4
	Exact Sciences	8	25.7
	Total	469	100.0

Source Own elaboration

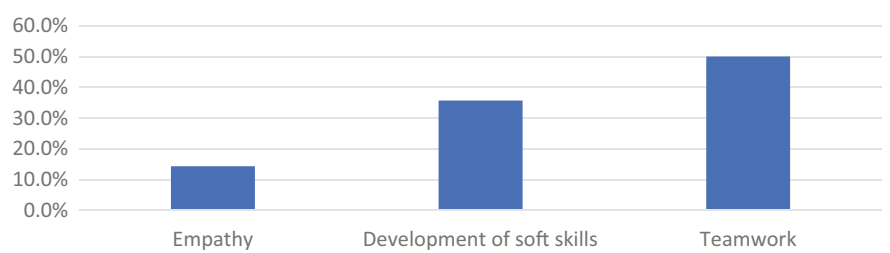


Fig. 40.6 Skills developed through DCA activities. Source Own elaboration

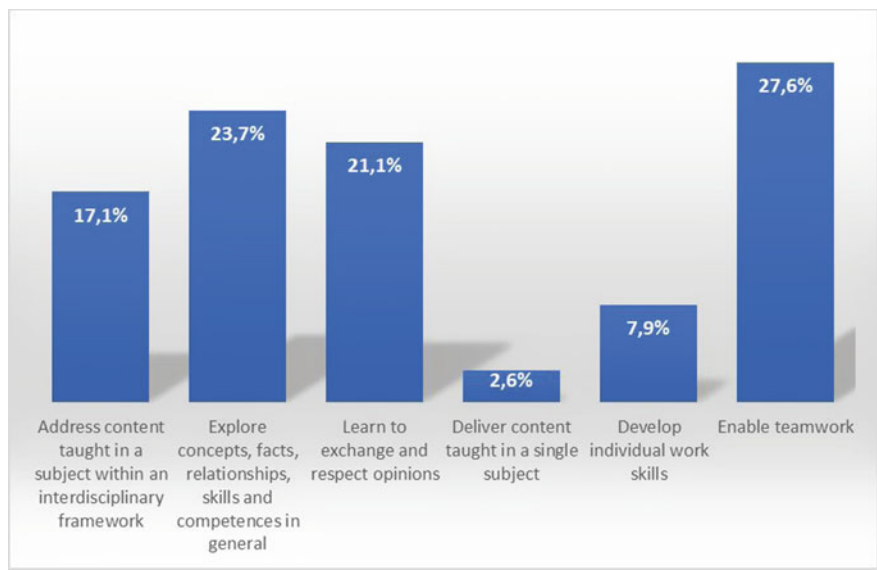


Fig. 40.7 Main goals of DCA activities. *Source* Own elaboration

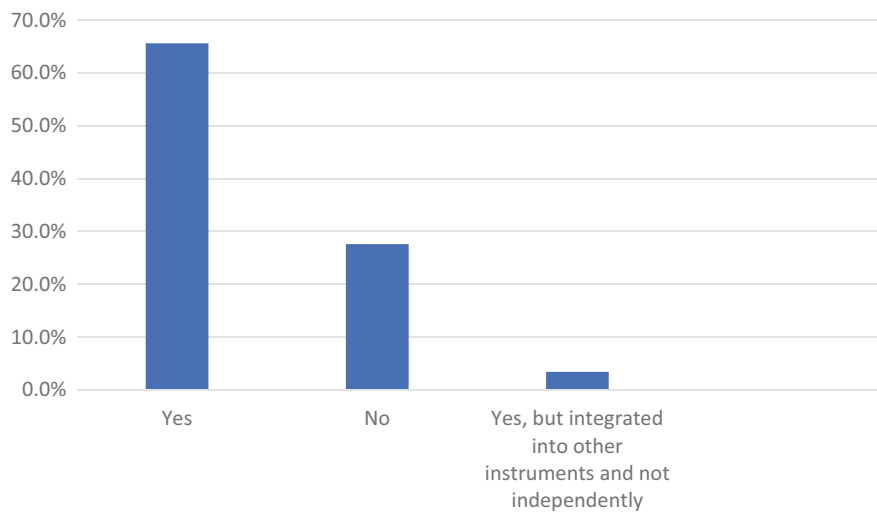


Fig. 40.8 DAC as an evaluation tool. *Source* Own elaboration

Moreover, when questioned directly about the development of DCA projects, most of the teachers interviewed are still reluctant, considering that either they do not have enough autonomy, since at the end of the study cycle students will only be assessed by their theoretical knowledge and not in terms of competencies, or because they

are not familiar with the methodologies to be implemented and the interdisciplinary work required.

40.6 Final Considerations

This work leaves no doubt: The project work influences students' learning.

As it is a content approach, based on the social constructivist learning theory, this work methodology in which the teacher provides a conscious and intentionally directed activity, in which both the teacher and the student are active agents in the educational processes [4, 8], stimulates attention, motivation, imagination, reflection, and the development of critical thinking. In fact, students consider the incorporation of these working strategies as an added value in the teaching–learning process, since it helps them to interpret the information and awakens a greater motivation, thus providing a better context for learning; however, in the teachers' universe, the opinion is not unanimous.

In this sense, the DCA is an excellent learning vehicle and as such enriches the development of the teaching–learning process, which should be an additional reason for the teacher to invest in the DCA to potentiate the whole teaching–learning process of his students.

We would like to point out that although 44% of the surveyed students still cannot associate the acronym DCA with the Domain of Curricular Autonomy, most of the students identify as main objectives of the work developed in this scope the ones of “making the classes more dynamic and developing the capacity to work in group” (43%) and “dynamically developing the necessary competencies to the development of the students' profile at the end of the compulsory schooling” (29%).

It is also noteworthy that 52.3% of the students recognize progress in their ability to work in groups, 16.2% learn to respect their colleagues opinion, 9.5% feel more autonomous, and 4.9% work on their leadership skills. In summary, 80.3% of the students say that the activities of the DCA have a positive impact on their results.

When we cross-reference this information with that provided by the teachers, they agree that the competence most developed by the students is group work (50%), as well as soft skills (35.7%), but they do not recognize that students develop leadership competence. In fact, teachers point out teamwork (27.6%), exploration of concepts, facts, and skills in general (23.7%), and respecting the opinion of others (21.1%) as the main objectives of the DCA. In fact, and also according to the interviews conducted, as reported [5], teachers did not welcome the reinforcement of curricular autonomy, nor did they believe that it would promote better results for the school.

We live in a hyper-connected and global world of great changes and uncertainties to which education must respond. In this sense, we should promote teaching aimed at helping to develop in students' greater mental flexibility and emotional balance, as well as the ability to discern relevant information from irrelevant information. The development of the Domains of Curricular Autonomy by fostering collaborative

practices for problem-solving stimulates critical spirit, imagination and creativity, crucial tools for building more aware, responsible, and autonomous citizens.

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Chapter 41

Societies, ICT, and Higher Education in the Twenty-First Century: Reflections and Proposals



C. M. Santana 

Abstract Universities contribute to building a country's capacity to participate in a knowledge-based economy. This article aims to analyze the role of HEIs in the twenty-first century, the possibilities and limits of ICT usage in higher education, as well as the challenges that need to be overcome for the development of DTC at this level of education. To achieve this goal, a literature review will be presented, as well as a proposal for to develop digital competence of university professors for future implementation.

41.1 Introduction

The term “knowledge society”, which appeared at the end of the 1990s, has come to be used particularly in academia as an alternative to the term “information society” (IS).

However, even though it is considered a less complete term than Knowledge Society, the most important discussions and decisions developed globally about post-capitalist society (World Summit on the Information Society in Geneva, [9], and in Tunis [26]) have used the terminology Information Society, defined by Campá [8] as that society in which “information”, that is, the communication of news or knowledge, the transmission—and, in any case, the storage—of virtual knowledge, predominates or has decisive importance.

The term “Society 2.0” is also used to refer to the Information Society. This term is related to the term “Web 2.0”, coined by O'Reilly [19] to characterize not only technology but an attitude toward increasing levels of interaction and collaboration among Net users, made possible by simpler, friendlier, and more intuitive environments. In this model of communication environment, O'Reilly warned almost twenty years ago, companies, governments, universities, and their professors would move,

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which is why it was necessary to prepare these agents for the type of society and interpersonal relations that would be created from Web 2.0.

This article aims to analyze the role of universities in the twenty-first century, the possibilities and limits of ICT usage in higher education, and the challenges that need to be overcome for the development of digital teaching competencies (DTC) at this level of education. To achieve this goal, a literature review will be presented, as well as a proposal for training to develop digital competence of university professors for future implementation.

41.2 The Role of University in the Knowledge Society

41.2.1 *University as an Agent of Change*

Knowledge has a central role in the production processes of Contemporary Society, resulting from the changes that have occurred in the economic-productive paradigm since the technical-scientific revolution of the 1970s: the traditional production factors (capital, labor, and natural resources), although important, lose ground to the need for the intensive use of knowledge and information, within the new logic of informational capitalism [9].

Universities can make a decisive contribution to building a country's capacity to participate in an increasingly knowledge-based economy, as highlighted in a World Bank report in which the institution points out that "*Tertiary education is fundamental not only for building the intellectual capacity for the production and usage of knowledge but also for promoting the lifelong learning practices needed to constantly update individual knowledge and skills*" [1].

In this same vein, in the Information Society Universities should not only focus on training professionals with a solid base of technical knowledge but also encourage the development of soft skills which are crucial in contemporary society, such as critical thinking skills, problem-solving, communication, and collaboration [18].

Encouraging students to develop additional competencies and skills such as entrepreneurship, environmental and social responsibility, as well as stimulating learning in settings where they can apply their knowledge, either by taking part in internships, research and innovation projects, or in work environments, among others, is also part of the new role played by universities in the twenty-first century.

In this sense, ISTE and UNESCO's [27, 28] guiding documents provided the foundations of strategies that nations should follow to prepare themselves and their citizens for a society in which the use of ICT plays a strategic role. Based on these guidelines, several countries in Europe and the USA have developed studies, frameworks, and strategies aimed at preparing their citizens to develop the skills and competencies required by the Information Society.

Governments in Latin American nations like Brazil, however, have not made comprehensive plans to train their citizens at the necessary speed to develop the

skills and competencies required by the Information Society. Such deficiency became evident during the Sars-Cov2 Pandemic, declared in March 2020 by the World Health Organization (WHO) and which required intensive use of ICT in all areas, including higher education.

41.2.2 *New Technologies in Education and Higher Education: Possibilities and Limitations*

When planning the use of ICTs, contemporary university institutions must be aware that these technologies should be geared toward contributing to the creation of a better and more just world, as pointed out in the Declaration of Principles of the Geneva World Summit on Information Society (2003): “*The Information Society must be people-centered, inclusive and development-oriented, where everyone can create, access, utilize and share information and knowledge, enabling individuals, communities and peoples to achieve their full potential in promoting their sustainable development and improving their quality of life (...)*”.

Universities utilize a variety of tools and platforms to develop their human resource training activities. In addition to face-to-face teaching, for the development of activities through the WEB, whether for Distance Education (DE) or interactive activities in blended learning courses, HEIs use online platforms, also known as Virtual Learning Environments (VLEs), designed institutionally or externally, such as Web Course Tools (WebCT), Moodle, and TelEduc, between others.

Teachers can use, through the platforms mentioned above and many others that have emerged more recently, to a greater or lesser extent, interactive tools such as discussion forums, e-mail systems, live chats, content in web page formats, PDF files, in the teaching–learning process.

The possibility of employing Open Educational Resources—OERs, available in repositories on the Web and covering all areas of knowledge, enriches the curriculum, and students can access and use them in face-to-face and/or virtual environments.

An innovative initiative of ICT use for educational purposes in Brazil was developed in Amazonas, in 2007, initially focused on basic education. Technology-Mediated In-Person Teaching (Ensino Presencial Mediado Por Tecnologias—EPMT) emerged as an initiative to overcome the challenges of training human resources in the smaller, less populated towns of the state, in the middle of the Amazon forest. The geographical challenges of this state led the Amazonas State Education Department to develop this ground-breaking solution, in which teachers conduct their classes in a media center in the capital, Manaus, connected in real-time with educational institutions in the small towns of Amazonas, where there are also auxiliary teachers who provide support to the students in person.

According to Santos [23], Technology-Mediated In-Person Teaching (EPMT) uses “*interactive communication technologies that enable the expansion of*

classroom-based courses to other locations. The teachers and the institution control the pace and place, and the transmission platform used as a virtual learning environment proposed by the Amazonas State University (UEA) is Internet Protocol Television—IPTV”.

The EPMT has received several national and international awards and is currently being applied, also in Higher Education by the Amazonas State University (UEA), to offer, from Manaus, an undergraduate course in economics to one of the state's small towns.

The Ministry of Education and Culture (MEC) replicated the experience of Amazonas' EPMT in other Brazilian states, starting with the creation of the National Educational Media Center (CNME) in 2018. In that year, this National Center already reached 17 of the 26 Brazilian states and the Federal District, benefiting 10,000 students in 150 schools, with plans to reach all Brazilian states, and it is also being used as a tool for teacher training [17].

The increasing use of mobile devices for educational purposes is also worth emphasizing. In 2013, UNESCO published the Policy Guidelines for Mobile Learning. This type of learning involves using mobile technologies such as smartphones, tablets, and e-readers, alone or in conjunction with other information and communication technologies (ICT), to enable learning anytime and anywhere [29].

The use of these mobile tools, especially smartphones, benefits learning because people can use mobile devices to access educational resources, connect with others, or create content, inside or outside the classroom.

During the pandemic, universities and other higher education institutions that train highly skilled had to resort, in addition to face-to-face, distance, and hybrid learning, to Emergency Remote Learning, using all available resources, including mobile devices, to try to keep educational activities going, even in the scenario of social isolation due to health issues.

Thus, remote teaching has arrived unexpectedly during the pandemic, and therefore, its main characteristic is the emergency implementation of the teaching and learning process outside the traditional in-person environments, forcing educational institutions to seek alternatives for the development of its activities on various platforms and combining various tools, devices, methodologies.

In turn, the usage of AI-based technologies, particularly since 2018, has boosted the productivity of higher education faculty and students, mainly after the launch of ChatGPT by AIOpen in late 2022, ushering in Web 3.0, resulting from the incorporation of artificial intelligence to Web 2.0 [12].

The use of this tool enables the generation of original texts on various subjects and in various formats by artificial intelligence. There are also concerns of all kinds because there are no legal frameworks in place to guide the ethical usage of this powerful technology yet.

Regarding the limitations of ICT use in higher education, it can be said that to expand the use of ICT in most Brazilian universities, the conditions pointed out a few decades ago in the Conference of Rectors of Spanish Universities [10] and which are also applicable to the Brazilian context are still necessary: (i) access of students and teachers to appropriate infrastructure; (ii) development of methodologies for the

usage of ICT in teaching; (iii) development of teaching materials based on ICT; (iv) training of teachers and students; and (v) encouraging the use of Information and Communications Technologies.

Therefore, structural and management issues and insufficient training of teachers and students in the use of ICT end up leading, in the field of higher education, especially in Brazil, to a significant increase in dropout rates, students taking leaves of absence, or abandoning university [14]. New proposals must be presented to minimize the impacts of the Pandemic on higher education, as well as to try to accelerate the necessary reduction of the gap between the profile that the Information Society demands from university teachers and students and the professionals being trained by higher education institutions.

41.3 Proposal for University Professors Training in ICT

Younger students (“digital natives”—[22]) are already adept at navigating the cyberspace, but the ICT training of university teachers has not advanced at the same pace, and new methodologies are needed to help, among other things, in reducing the digital gap still present between teachers and students, and to result in a higher level of digital teaching competencies (DTCs).

Historically, models of teacher training have been based on two conceptions, one that defines a set of desirable characteristics in the professional, while the other visualizes the teacher in the context of the complex reality in which they work. The theoretical model, which aims to train professionals capable of responding to the demands imposed by the academic situation. The critical-reflective model is part of a broader movement of curricular and teaching renewal whose central idea is that of the “teacher-researcher”.

For Martínez [16], considering the current needs of the scientific and working world in the realm of communication networks, university professors of the twenty-first century must be professionally trained in six aspects: (i) lifelong learning skills; (ii) communication skills; (iii) collaboration skills; (iv) creative skills, (v) ability to survive dynamic changes; and (vi) adaptability.

In other words, university professors, to fulfill the tasks that the twenty-first-century universities demand of them, need not only to master the scientific content of their subjects, but also to know how to teach what society demands of them, and this requires that teachers receive adequate and continuous training for this purpose.

In the field of teacher training in ICT, Spark and Loucks-Horsley [25] present a variety of models, which can still serve as a reference for the development of new models of teacher education today. Current proposals should be designed taking into account the complexity of the social context in which universities are inserted and the educational needs of their teachers. The training models should also consider the four paradigms that theoretically structure teacher training, according to Zeichner [31], as cited in Cáceres Mesa et al. [6]: (i) the behaviorist paradigm; (ii) the personalist

or humanist paradigm; (iii) the traditional-artistic paradigm; and (iv) the critical–reflexive paradigm.

We consider the critical–reflective paradigm to be the most appropriate for current and future teacher education programs because it is oriented toward inquiry centered on critical investigation and reflection on the causes and consequences of classroom actions. This paradigm gives teachers the intellectual capacity to reflect on and value their own practice, as well as establish a link between teacher education and the external sociopolitical reality, aiming to improve the world through education.

In addition, Cabero [5] calls attention to the fact that the skills required from teachers nowadays must go far beyond mere training by highlighting that “*teacher education in audiovisual and computer media and in new information and communication technologies must contemplate a variety of dimensions*”, considering the teacher as a reflexive-practitioner.

According to Gutiérrez Martín [13], training teachers to use the new multimedia technologies should include not only instrumental information but also the knowledge of the hidden curriculum, the implications and consequences of using ICT in formal and informal education, as well as the context where their professional activity happens and the social reality in which the educational institution is inserted.

The European Union defines “digital competence” as: “the safe, critical and responsible use and interaction with digital technologies for learning, at work and for participation in society. It includes information and data literacy, communication and collaboration, media literacy, digital content creation (including programming), security (including digital well-being and cybersecurity-related skills), intellectual property issues, problem solving and critical thinking” [2].

Paz et al. [21] conducted a study on Digital Teaching Competencies (DTCs) in the past few years, contemplating research on frameworks for the development of DTC divided into three subgroups: (a) range of models, by Cuartero et al. [11]; (b) TPACK model, by Ortiz-Revilla et al. [20] and Cabero Almenara and Martínez Gimeno [4]; (c) DigicomEdu model, by Cabero-Almenara et al. [3] and Caena and Redecker [7]. It is also worth highlighting that, when associating the topic of DTC with development, the authors believe that ICTs have continually modified various fields, including the field of education. Paz et al. [21] also report that there are few studies concerning the certification of Digital Teaching Competencies.

The definition of the term Teachers Digital Competencies (TDCs) is varied, but “*there are coincidences in fundamental aspects that emphasize the need for teachers to have didactic and technological knowledge that allow them to make use of digital technologies in their professional practice, the latter being understood in a broad sense*” [2].

Aiming to contribute to studies in the field of teacher training in ICT that will help to fill the gap of more detailed and specific programs for the development of DTC in higher education, we present a proposal for training in Digital Teaching Competencies for University Professors (DTCUPs), considering the main ICT competence standards and the digital teaching competencies (DTCs) desirable at this level of education [15, 27, 28]. A summary of the proposed activities is presented in Table 41.1.

Table 41.1 Summary of the proposed activities

Activity	Professor's action
Check-in	Answer the DigCompEdu CheckIn self-assessment questionnaire
Self-assessment	Analyze check-in results to assess DTC level
First Training Phase (N1)	DTCUP Training—Level 1 (basic)
N1 Test	N1 Certificate—140 h
Second Training Phase (N2)	DTCUP Training—Level 2 (intermediate)
N2 Test	N2 Certificate—120 h
Third Training Phase (N3)	DTCUP Training—Level 3 (advanced)
N3 Test	N3 Certificate—100 h
Check-in	Answer the DigCompEdu CheckIn self-assessment questionnaire again, comparing the results with the first Check-in
Specialization—after completion and approval in the three levels of training (N1, N2, and N3)	Present certificates obtained in the three training modules to obtain the specialization certificate in digital teaching competence in higher education (360 h)

Digital Teaching Competencies for University Professors (DTCUP) Training Program

Source Original by the author

The curriculum proposed for the DTCUP Training Program is as follows.

1. Basic Level: Theoretical Aspects and Basic Notions of Technology—N1
 - (a) Pedagogy and contents: related to theoretical and paradigmatic aspects that should guide educators' actions, the understanding of the role of university professors in the Information Society. Connectivism [24]. Hybrid Education. Active Methodologies. Development of soft skills. Notions on university entrepreneurship and innovation.
 - (b) Technical and Instrumental Aspects: related to the integrated use of ICT in the study guides, including the competence for the instrumental use of these technologies, their availability, and technical support.
2. Deepening Knowledge in ICT Level—N2
 - (a) Social and sanitary aspects: include the moral, legal, and sanitary codes (ergonomic, psychological, and human aspects) which must be considered when accessing ICT. Data Protection Law. Humans Rights Legislation, employment law, children's rights, women's rights, and legislation that guarantees gender, racial, and ethnic equity; cybersecurity, among others.
3. Knowledge Creation Level—N3

- (a) Collaboration and networking: actions that can be developed by professors with the help of ICTs (interrelationships at local, national, and international levels), experience exchange and/or shared experiences among several university institutions; creation of online communities.
- (b) Content Creation—training in tools/resources for content production and ICT (tools for recording/editing/publishing videos, podcasts, publishing software, among others); analysis of planning and reflection tools, as well as tools for helping students to create and produce their own learning activities. Use of art to promote learning values and to help students develop soft skills, reflective and critical thinking, stimulating continuous learning. Open Educational Resources—OER, curadory, utilization, and creation.

It is important to point out that the implementation of this process must also rely on the implementation of institutional actions to expand the use of ICT in classrooms, combined with individual and teacher-team initiatives.

41.4 Conclusion

In the context of the Information Society (IS), the only certainty is continuous change and the need to face, in increasingly shorter spaces of time, the new demands brought about by the different processes inherent to a globalized and complex society, in which the advances in Information and Communication Technologies (ICTs) assume a prominent role. The most advanced economies are based on the greater availability of knowledge; comparative advantages increasingly depend on the competitive use of knowledge and technological innovations. This centrality makes knowledge a fundamental pillar of wealth and power in developed nations, which is why developing countries must make the necessary efforts to overcome their limits and renew their university systems, powerful tools for generating cultural and material progress, with the ultimate goal of not being excluded from the Knowledge Society.

As universities play a fundamental role in the development of society, it is necessary that this entity renews itself, reviews its dogmas, infrastructure, and curriculum, and prepares its professors, among other measures, to be able to respond to the pressures of the complex society in which it is currently inserted. This is why it is urgent to prepare university professors to develop the multiple digital teaching competencies necessary for the formation of professionals and citizens with the profile required by contemporary society.

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Chapter 42

The Importance of Digital Marketing in Hospitality: The Case of *Hotel Fafense*



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Abstract Currently, digital marketing is widely used in all sectors of activity, world-wide, with the aim of promoting, in a more agile way, any type of business. Although the concept of digital marketing emerged some years ago, it was during the period of the Covid-19 pandemic that companies, for the most part, began to bet on this concept, as a way of being able to carry on with their sales. With regard to the tourism sector, in particular the hotel industry, this type of marketing enables it to publicize the accommodation units, causing the number of reservations to increase considerably. It should also be noted that if a good marketing strategy is applied to the destination where the hotel unit is situated, all local actors will benefit from the arrival of tourists. Regarding the aim of the present paper, it is intended to present a case study, with the purpose of analyzing the impact of digital marketing in the

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Hotel Fafense, located in the city of Fafe. Firstly, the need to invest in technologies is explained, taking into account the importance of digital marketing. The methodology employed consists of a case study, based on a qualitative research approach. The data collection instrument used is the semi-structured interview. It should also be noted that the study presents a main starting question and five secondary research questions. Regarding the results of this study, the use of technologies has had a positive effect on the promotion of the hotel object of study. Thus, it can be concluded that the commitment toward digital marketing becomes an added value for the hotel sector. However, it has more or less impact, depending on where the unit is located.

42.1 Introduction

With the focus on technology, local tourism agents, both in the public and private sectors, have been implementing projects to attract a greater number of visitors and, consequently, overnights. This fact triggers the interest in addressing this topic, since technologies are increasingly associated with windows of opportunity in all sectors and, more than ever, in tourism.

This paper has as its main objective to study the impact of digital marketing in the hotel industry, focusing on the “Hotel Fafense”, located in Fafe.

In this way, a starting question arises (1) “Is Hotel Fafense a case of extreme success or failure with regard to the applicability of digital marketing?”

In addition to this initial question, five secondary research questions were posed, namely: (1) “How do you publicize Hotel Fafense?”; (2) “Have you put into practice any digital marketing strategy? If so, which one or which ones?”; (3) “If you answered yes to the previous question, have these strategies contributed to the increase in sales of stays?”; (4) “Do you consider digital marketing essential for increasing sales of stays in the hotel industry? Why?”; (5) “Do you consider that digital marketing has contributed to the reduction of seasonality in the hotel industry? And what about Hotel Fafense?”

The methodology applied consists of a case study, grounded by a qualitative research approach. The data collection instruments used were direct observations resulting from a semi-structured interview.

This paper is organized as follows: the second section presents a brief review of the extant literature regarding digital marketing versus traditional marketing; innovation and digital transformation in tourism; and finally, hotel digital marketing. In turn, Section three describes the methods used in the current research, while Section four reveals the research results. Finally, Sections five and six of this paper address the conclusions of the study and the limitations and proposal for future studies.

42.2 Literature Review

42.2.1 *Digital Marketing Versus Traditional Marketing*

The main difference between digital marketing and traditional marketing is the ability to monitor user behavior and campaign performance in real time.

Companies seek to publicize their products or services through marketing, using the ways they consider appropriate to achieve the desired results, increasing sales and profits. According to [1], traditional marketing refers to the set of controllable marketing tools (product, place, price, and promotion) that the company uses to achieve its marketing objectives in the target market. It comprises communication made in offline channels and media such as television, radio, written press and external media, traditional tools, that are still very relevant and effective.

In turn, digital marketing, a broad term, uses the tools of digital technologies [2] and is currently essential to reach consumers more efficiently [3]. With communication and marketing actions carried out in the online context, it includes not only the process of selling products or services, but also the production of content and incorporation of real value into the consumer's life.

Traditional marketing has the same objective as digital marketing, which is to foster synergies between product and service providers and their consumers. However, what distinguishes them are the tools used to attract the customer. Basically, traditional marketing works with classic media, while digital marketing works on the web, mainly on social networks.

With globalization and the new tourist profile, new challenges arise. The consumer does not easily accept inappropriate and utopian marketing campaigns. Thus, in order to achieve objective results, it is necessary to reposition destination marketing, bearing in mind cooperation between competing or complementary destinations, but also including stakeholders, consumers, and residents [4].

Effectively, according to [5], publicizing a place should include: advertising, annual reports, offers, panels, brochures, business cards, direct-mail, newsletters, clippings, portfolios, press kit, sales kit, staff, street signs, travel guides, fairs, uniforms and costumes, videos and DVDs, signage, websites.

For [6], the degree of consumer involvement in products and services is often a determining factor in the decision-making process. Engagement fluctuates, being determined by the importance that consumers attach to the product or service.

Traditional media, while still effective [7], are not as strong as in the past. Using digital marketing is currently absolutely essential to solidify a brand and promote sales.

Finally, and according to [8], digital marketing helps to promote the brand, focusing on results and customer engagement in supporting the brand. For the authors, technological convergence will eventually lead to convergence between digital marketing and traditional marketing.

42.2.2 *Innovation and Digital Transformation in Tourism*

Tourism is undoubtedly one of the industries that has benefited the most from digital evolution. That is why it is normal that digital marketing already plays an essential role in the success of this sector.

Digital marketing burst into tourism and changed the way companies approach customers.

In the tourism industry, the disruption was felt a few years ago and brutally transformed the way companies reach customers.

The need to invest in this area is felt like never before, not least because there is an awareness that potential customers can, with just a few clicks, have instant access to the information they are looking for. Whether through social networks, brand websites, comment websites, among many others.

With digital, new ways of doing marketing have emerged and the products themselves have evolved. The tourism industry, in particular, has been disrupted as a whole due to the rapid development of the internet. Users now have an increasing ease of knowing the existing offer and have greater ability to compare prices, features, among others.

To be able to compete and succeed digitally, the most relevant digital marketing activities include: website, social media presence, Search Engine Optimization, email marketing, mobile friendly content.

Innovation can be considered as a process of transforming opportunities into results. It is the application of know-how in a differentiated, value-added, sustainable way, making the action more economical and productive. Innovation is the specific tool of entrepreneurs, the process by which they pursue changes as an opportunity for a diverse business or a diverse service [9].

Another more recent concept of innovation is presented by [10], which defines innovation as the creation and implementation of new ideas, with a view to generating value for society, whether they are internally focused or external to the public administration, thus resulting that it is the outcome of the use of creativity. It appears that, unanimously, innovation has been described as a determining and primordial force for world socioeconomic development, as a source of value in the market, used as a sustainable competitive advantage, determinant of business performance and success [11–15].

With regard to innovation in tourism, according to [16], one can verify the focus on company managers as being the key person to stimulate innovation, in terms of innovations and progress. In Portugal, this research began with the analysis of innovation, based on hotel managers in Aveiro [17], but other authors had already taken other approaches, characterized by superficial and generalist approaches. Currently, research will have to follow a more dynamic field, in line with current developments and contexts.

Framed in tourism, considering its diversity and complexity, Hjalager (2010) cited by [17] describes five types of innovation, with different approaches: product or service (by the new meanings that can be observed by tourists and customers);

process (improvement in the efficiency and productivity of the company's systems); managerial (change in the forms of organization of the enterprise); marketing (new programs and approaches), and institutional (change in the structure of networks, alliances or partnerships).

According to the same author, the dimensions of innovation in hotels may involve different aspects of the hotel industry which, in turn, indicate approaches based on interest groups, namely: services or products; marketplace; law suit; organization, referenced in four types of hotel innovations of nature: managerial, which shape the quality and competitiveness of the hotel; external communications, which consider the intangible and informational nature of hotel processes; of scope of services, which represents an incorporation of enabling technology for hotel services; and innovation at the back-office level, which concerns the incorporation of technological elements that facilitate not only the provision of services, but the entire process of production, delivery, and customer service.

Conferring to the authors Buhalis and Sinarta [18] and Xiang and Gretzel [19], the importance of customizing services to improve the tourist experience through the use of digital technologies, as well as the relevance of the role of social networks in researching information about tourist destinations, in which tourists use these platforms to plan their trips, as well as the impact of social networks as a determining factor in tourist decision-making, is showing how they influence the choice of destinations and tourist services [18, 19].

Likewise, virtual and augmented reality applied to the tourism industry provides immersive experiences for tourists.

Finally, among studies applied to the hotel industry, the following stand out: the importance of data analysis on online evaluation platforms to understand tourists' preferences and improve the offer of tourist services; recommendation systems that use customer data to offer personalized suggestions for tourist destinations and services; and the implications of digital transformation in the hotel industry, highlighting the challenges and opportunities for hotel owners and employees [20].

42.2.3 Hospitality Digital Marketing

Hospitality digital marketing consists of the set of actions that a hotel, inn, hostel, or other hospitality establishment performs online, with the aim of attracting new guests, creating relationships, and developing a brand identity [21].

It is the most used way to communicate with the public in a direct, personalized way and at the right time. Kotler [22] states that marketing is the social process by which people and groups of people satisfy wants and needs by creating, offering, and freely exchanging products and services of value with others [22].

The companies' strategy in the digital environment can go through a set of tools and channels available, such as capturing traffic organically (SEO—Search Engine Optimization or publications on social networks, without advertising), paid advertising on search engines (SEM—Search Engine Marketing) or on social media,

content creation, or through affiliate networks. The strategic options of each company must be related to its objectives, its target to be impacted, the functionalities of each platform, and the company's own means.

These strategies have been adopted by companies from different sectors of activity and the hotel sector was no exception. For these companies, digital marketing is a competitive advantage and a strong tool for the implementation of tourism marketing actions, in addition to allowing the verification of results [23].

In the hotel sector, the service is produced and consumed at the same time, with the need for the customer to travel to the place where this service will be provided, and therefore, it is not possible to view the service before it happens [24]. These characteristics make marketing assume great importance here, as it is necessary to convey confidence to the customer and guarantee the quality of the service that will be provided.

Tourism marketing thus focuses on planning strategies to attract visitors to a given destination [25]. Hotel digital marketing, on the other hand, is directed to accommodation units, being responsible for optimizing sales, improving guest service, publicizing the hotel unit and availability in real time [26].

In this way, it is extremely important to adopt digital marketing strategies for all hotel units, thus proving to be a tool that acts as a means for companies to direct their communication and marketing efforts, aiming to meet the needs and consumers' desires more efficiently and effectively than its competition.

42.3 Methods

Although there are already several studies about digital marketing in the hotel industry [27–29], we chose to choose a specific hotel, which is why we chose the case study as a type of methodology.

Research supported by case studies has been gaining more and more reputation. This growing notoriety is largely due to authors such as Yin and Stake, who, although from perspectives that do not completely coincide, have sought to deepen, systematize, and enhance the credibility of the case study, within the scope of research methodology.

Yin (2005) quoted by [30] defined a case study as: “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, when the boundaries between phenomenon and context are not clearly evident, and in which multiple sources of evidence are used”.

The case study can be considered as a valid method for research in tourism and hospitality. Table 42.1 summarizes the main features of the case study.

The case study as a research strategy is addressed by several authors [32–35], for whom a case can be something well-defined or concrete, such as an individual, a group, or an organization, but it can also be something less defined or defined on a more abstract level, such as decisions, programs, implementation processes, or organizational changes.

Table 42.1 Features of the case study

1	Can explain why an innovation worked or failed to work
2	Has the advantage of hindsight, yet can be relevant in the present and to the future
3	Can illustrate the complexities of a situation by recognizing more than one contributing factor
4	Shows the influence of personalities and politics on an issue
5	Can show the influence of the passage of time through longitudinal studies
6	The reader may be able to apply it to his/her situation
7	Can evaluate alternatives not chosen
8	Can utilize information from a wide variety of sources
9	Can present information in a wide variety of ways
10	Can illuminate a general problem through examination of a specific instance

Source [31], p. 38, adapted from Beenton [31]

In the present study, we intend to address a well-defined case, supported by a qualitative research approach, since this aims to present the impact of technologies on tourism for the city of Fafe. In order to understand why this case of Hotel Fafense is relevant to the theory of the investigated area, it is necessary to elaborate the following question: “Is Hotel Fafense a case of extreme success or failure with regard to the applicability of digital marketing?”

The interview is one of the most important and essential sources of information in case studies [32]. Also, according to [36], interviewing is one of the most common and powerful ways of trying to understand other human beings. The interview is still considered a great instrument to achieve the diversity of descriptions and interpretations that people have about reality, which is why we found it pertinent to choose this instrument for the elaboration of the present study.

There are three types of interview, structured, semi-structured, and non-structured [37]. In this case, the semi-structured interview was chosen because, in occasions where we do not have more than one opportunity to interview a participant, is the one that best suits our purposes [38]. This type of interview has much of the freedom of the unstructured interview and requires the same skills, but the semi-structured interview relies on the use of an interview script. It is a list of questions and topics that must be covered in a certain order. The semi-structured interview is open, but follows a general script and covers a list of topics. Therefore, the semi-structured interview seeks to obtain descriptions of the interviewee’s worldview, with the purpose of interpreting the meaning of the described phenomenon [39].

Therefore, the use of the semi-structured interview is aimed to provide an understanding of tourist behavior by a local hotel unit, in the context of the applicability of digital marketing strategies, following an interview script with six questions. This type of data collection instrument was the most suitable for our purposes, as we had the opportunity to interview the Manager of Hotel Fafense. As the interview was

conducted by email, there was no room for probes on topics of interest verbalized by the interviewee.

The interview gave rise to five more secondary research questions, namely: (1) “How do you publicize Hotel Fafense?”; (2) “Have you put into practice any digital marketing strategy? If so, which one or which ones?”; (3) “If you answered yes to the previous question, have these contributed to the increase in sales of stays?”; (4) “Do you consider digital marketing essential for increasing sales of stays in the hotel industry? Why?”; (5) “Do you consider that digital marketing has contributed to the reduction of seasonality in the hotel industry? And what about Hotel Fafense?”

The main objective of this study was to understand the impact of digital marketing on the hotel industry, focusing on Hotel Fafense.

42.4 Findings

The interview is started by considering the importance of digital marketing in the hotel industry. The person interviewed for the case study of this paper was the Manager of Hotel Fafense.

The first question was as follows: (1) “Has digital marketing had a positive impact on the hospitality industry? Why?” The answer given by the interviewee was as follows: “It will depend on what we understand as Digital Marketing. If we are talking about advertising on social media, promotion ads, and the like, we can say that it has a slight impact, but not as much as a good ranking on OTAs. For us (Hotel Fafense), the best marketing is our online reputation. It is our scores on Booking, Expedia, Google, Hotels.com, and others that drive the highest influx of online bookings”.

Regarding the second question, about how the hotel is publicized, it was posed as follows: (2) “How is Hotel Fafense publicized?”, the answer obtained was the following: “The fact that we focus more on reputation does not mean that we do not do our bet on social networks. We currently hire a local digital marketing company to maintain our networks and keep them active. We advertise mainly through Facebook and Instagram”.

The third and fourth questions complement each other, since in what concerns the answers, these are also additional to each other: (3) “Have you been putting into practice any digital marketing strategy? If so, which one or which ones?” (4) “If you answered yes to the previous question, have these contributed to the increase in room sales?” The answers were positive; however, there was a caveat on the part of the interviewee to the fact that Hotel Fafense is a small unit and that such digital marketing strategies are much more notorious in large units, located in urban centers that are also larger. The answer to the third question was then as follows: “Yes. Although Hotel Fafense is a small unit, in January we prepared an annual agenda with two monthly posts. A post to talk about what is happening in the city of Fafe, and another focused on events, holidays and/or offers/promotions related to Hotel Fafense”. With regard to the answer to the fourth question and for the reasons given above, the answer obtained was the following: “Minimally. It is not that there are no

reservations, but we note that, in the case of Fafe in general and Hotel Fafense in particular, our reviews continue to be the driving force of online reservations”.

With regard to the fifth question (5) “Do you consider digital marketing essential for increasing sales of stays in the hotel industry? Why?”, the response obtained by the Fafense Hotel Manager was as follows: “Any tool that increases sales is welcome, whatever it may be. Digital marketing serves, even in the absence of a large influx of bookings, to attract followers, who in the future will have access to the hotel’s novelties and, consequently, increase sales”.

With regard to the sixth question (6) “Do you consider that digital marketing has contributed to the reduction of seasonality in the hotel industry? And what about Hotel Fafense?”, the answer obtained to the first part of the question was positive. However, with regard to the second part of the question, the answer is that Hotel Fafense has an interesting occupancy rate throughout the year and that digital marketing helps, but does not make a difference, this from the perspective of the interviewee, as can be seen: “I believe that it achieves an important reduction in seasonality in more seasonal places. In the case of Fafe and Hotel Fafense in particular, as we have an interesting occupation throughout the year, digital marketing helps, but it does not make the difference that it can make in places like Gerês, Algarve and others”.

Finally, as a discussion of the data presented, it appears that as Hotel Fafense is in a small town, digital marketing does not have a great impact on its proper functioning.

This situation is due to the fact that it essentially works with direct bookings and does not depend, for the most part, on digital marketing.

42.5 Conclusion

From the present research, we can infer that it appears that digital marketing is indeed important for the hotel industry.

However, considering the fact that a small hotel unit was chosen which was located in a small town, the applicability of digital marketing strategies is not as impactful as in larger hotels located in large urban centers or in tourist destinations such as Porto, Lisbon, or the Algarve.

It is also important to mention that despite this reality, the hotel under study has been investing more and more in digital marketing, which makes the occupancy rate interesting throughout the year, thus not occurring, likewise, low-season periods.

This research contributed to verify that in the case of hotels located in small towns, they do not live essentially and exclusively from the applicability of digital marketing strategies to increase their reservations.

However, it is important that the hotel sector continues to invest in digital marketing to stand out in the tourist market and thus attract more tourists to the towns where they are located.

42.6 Limitations and Proposal for New Study

Regarding to limitations in carrying out the present study, it appears that although it was possible for us to interview the Manager of Hotel Fafense, it was found that it would be interesting, as a proposal for a future study, to analyze more than one unit hotel.

This situation is due to the fact that we can obtain a comparative term, with regard to the importance of digital marketing, as well as its impact on increasing bookings.

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