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Vicky Katsoni
George Cassar *Editors*

Recent Advancements in Tourism Business, Technology and Social Sciences

10th International Conference, IACuDiT,
Crete, Greece, 2023—Vol. 2

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Editorial

Recent Advancements in Tourism Business, Technology and Social Sciences

Even without directed actions, the process of globalization continues, and the direction in which it is heading strengthens the belief that methods and tools should be adapted to the new realities (Stiglitz, 2017). Tourism, trade, and technology can amplify the prospects of economic growth, job creation, and increased productivity. Economic welfare and social development are in a mutual relationship (DaSilva et al., 2019; Zhang & Zhang, 2004). Therefore, new ways of using traditional factors of production emerge, along with new rules for organizing activities to address the emerging realities in the various social sciences (Şerban, A.C., Jianu, I., Katsoni, V., 2023).

Tourism is a multifaceted reality in today's world and offers scope for global development and diversification while its resilience is now a proven quality. Indeed, it has become one of the principal pillars of the world's economy with 10% of global GDP directly or indirectly derived from the presence and exigencies of the tourism industry (Cassar, G., 2020). The thousands of destinations that exist and the many more that emerge from time to time, look at advancements in the tourism business, technology and the social sciences for direction, guidance, and support. Academia is one of the most powerful and enlightening sources that these destinations bank upon for their future. The professionals in the tourism sector, of course, also offer their expertise through years of hands-on activity and a strong dose of experience and good practice. Yet, many of the tourism operators look to researchers, academics, and associate professionals to propose novel and tested remedies for a changing world scenario challenged by environmental catastrophes, health and safety challenges, technological inventions, economic pressures, social exigencies, and myriad other difficulties and permutations. Tourism, as it has now been shown, is as fragile as it can be strong. Its strength is tested every day. Its fragility is experienced each time a crisis—global or local—crops up. Policies are introduced by world bodies, regulations and laws are enacted by national governments, while further rules are

sometimes forced upon operators, sectorial stakeholders, tourism operators, destination management entities, and dependent sectors. At times (most times) this creates tension and confusion as to how one should proceed.

IACuDIT's mission is to contribute to the paradigm changes needed, which closely relates to the 2023 conference theme: *Recent Advancements in Tourism Business, Technology and Social Sciences*. The aim of this conference is to promote constructive, critical, and interdisciplinary conversations on the challenges emerging in the various sectors of the tourism industry by bringing together researchers, communities, industry, and government stakeholders. This is hereby fully achieved.

A list comprising of 36 interdisciplinary conference topics was included in the call for papers. The numerous papers submitted through virtual and poster presentations were considered for publication. All those accepted for the conference were double-blind peer reviewed in two phases. Thus, all the abstracts submitted were in the first stage peer-reviewed by two experts in the field to ascertain their relevance to the conference theme and for their contribution to the academic debate. A total of 182 abstracts were reviewed of which 124 were found relevant. All accepted proposals were offered the opportunity to submit full papers for the conference proceeding, utilizing the comments from the first phase of double-blind peer review. This resulted in 105 papers being submitted for inclusion in the Springer proceedings in Business and Economics. These full paper submissions were once again double-blind peer-reviewed by two experts in the field, as well as by the editorial team. During this second cycle each submission was reviewed for: (a) relevance to the conference theme, (b) quality of the paper in terms of theoretical relevance and significance of the topic, and, (c) contribution to the academic debate. The contributions were thematically selected and are arranged in the present proceedings according to the order of their presentation. The subthemes covered by the conference were further categorized into five distinctive parts, which were distributed in two volumes.

Volume 1 consists of 3 parts:

- Part One** *Tourism and Technology: Current approaches and Applications in Marketing, Destination Management and Planning*—24 chapters
- Part Two** *Tourism Development and Sustainability*—23 chapters
- Part Three** *Cultural and Heritage Tourism*—17 chapters

Volume 2 consists of 2 parts:

- Part Four** *Tourism Perspectives in a Social and Business Environment—Current Developments and Experiences*—31 chapters
- Part Five** *Sports and Wellness Tourism*—10 chapters

Volume 2

Part Four—Tourism Perspectives in a Social and Business Environment—Current Developments and Experiences

This part of the book consists of 31 chapters and aims at presenting the development and integration of emerging technologies is changing perceptions in all aspects of entrepreneurship, providing new methodologies and implementing new practices in fields such as education, organizational culture, and generation diversity.

More specifically:

In chapter, “[The Influential Role of Organizational Culture and Behaviour of Wood Companies in the Communication of Products in the Tourism Economy](#)”, Leontis C. Dimitrios, Maria Termentzoglou, and Ioanna Grigoriou investigate the correlation between organizational culture and behaviour of wood products with regard to the promotion of the tourism economy. Simultaneously, studies by other researchers will be investigated and proposals will be submitted for the sector’s further strengthening. The methodology used is based on bibliographic research, the analysis of texts and secondary sources. The expected results of the research seek to demonstrate the effect of the organizational culture and behaviour of wood companies on the promotion of products in the tourism economy.

The chapter titled, “[Crisis Management in Business Tourism. An Empirical Study in the Iberian Peninsula](#)”, is written by Fernanda Ferreira, Dália Liberato, Marta Sousa, Pedro Liberato, and Elga Costa. This research analyses the crisis management of the business tourism industry in the Iberian Peninsula. In developing the study, a qualitative methodological approach was chosen, based on semi-structured interviews with entrepreneurs in the tourism sector in Portugal and Spain. The general objective of the study is to assess the impact of the crisis caused by COVID-19 on business tourism in the Iberian Peninsula. The main conclusions highlight the change in the organisation of events, such as exhibitions, congresses, fairs, and shows, which had to adapt to the new policies of social distance, including the limitation of places, which eventually constrained the organisers to cancel, postpone, or transform events into online activities when possible.

In chapter, “[Generational Diversity in Tourism Workforce: Evaluating the Reported Differences Across Cultural Clusters](#)”, Emmanouil F. Papavasileiou and Eirini Dimou evaluate the reported differences between Millennials and the preceding generations—Generation X and Baby Boomers—in the tourism workforce across cultural clusters—Germanic, Anglo, Eastern European, and Southern Asian. The evaluation is presented in terms of effects derived from pairwise comparisons (or paired comparison method) in a number of aspects of tourism work and employment which include, variety and change, withdraw behaviours, work–life balance, job security, autonomy, pay, attachment to the organization, stimulation and co-workers’ relationships. Although the findings indicated similarity among cultural clusters, Dutch Millennials, contrary to their counterparts in the USA and

Cyprus, placed less importance than the preceding generations on aspects related to pay. Similar differences were also found in aspects related to mobility and work–life balance. Thus, future development of this field of inquiry will require a better understanding of the impact of national culture.

The chapter titled, “[Accessibility in Tourism: Optimizing the Tourism Experience Through Social Sustainability Interpretation](#)”, is written by Pedro Liberato, Dália Liberato, Ana Vieira, Teresa Mendes, Hugo Barreira, and Cristina Rodrigues. This research establishes the objective of identifying the accessibility measures adopted in the cities of Braga and Guimarães, in the Northern Region of Portugal, through issues related to the specific training of employees, the use of new technologies as a competitive advantage, the concern with presenting information in various formats and the appropriate means of transport. For the collection and analysis of information, the qualitative method was selected; an exploratory descriptive study based on semi-structured interviews, conducted with the official responsible, stakeholders, interpreter guides and associations of each tourist destination. The results show that, despite the improvements made in recent years, the regions still face some barriers. The measures frequently identified with the aim of optimizing accessibility in tourism destinations were specifically the use of access ramps (removable or fixed) and the introduction of adapted and assisted toileting systems.

The chapter titled, “[Gender Gap in Tourism SME Innovation Practices](#)”, is written by Susanne Marx and Michael Klotz. Research on gender differences of innovation approaches in the tourism sector from an individual actor view is however rare. Therefore, this study explores how gender differences are expressed in the approach of innovation in tourism small and medium-sized enterprises (SMEs). Paired samples of a male and female manager in three SMEs are interviewed. The qualitative content analysis focuses on the definition of the term ‘innovation’, the personal perception as an innovator, as well as the approach to designing innovation activities. The comparison contrasts the findings based on the biological gender as well as on the feminine and masculine discourse. The study suggests propositions recommended for future quantitative research.

In chapter, “[The Digital Transformation of Hybrid and Virtual Meetings and Events in the Greek Meetings Industry](#)”, Alexandra Chalkia and Athina Papa-georgiou investigate virtual and physical meetings and events in the post-COVID-19 period. By employing established theoretical frameworks and assessing attendee feedback through the utilization of a comprehensive questionnaire, this research reveals that individuals belonging to specific demographic cohorts prefer virtual event participation, while those who favour physical participation think that it offers a more stimulating experience. Consequently, the refinement of virtual and hybrid events should focus on increasing the level of engagement through enhanced interactivity.

In chapter, “[Leaders’ Psychopathic Traits in the Dynamic Context of Tourism Ventures: The Impact of Boldness on Managers’ Unethical Leadership and Unethical Employees’ Behavior Toward Customers](#)”, Vasiliki Chatzi and Aikaterini Galanou investigate the association between managers’ psychopathic traits (boldness) and service behavioural intentions of hotel employees. Empirical data was collected from 179 full-time managers in the Greek hotel sector. A structural equation model analysis

was followed. The results provide empirical evidence for all suggested hypothesized associations. In particular, the findings display that managers' boldness predicted unethical leadership, which then positively associated with unethical employees' behaviour towards customers. The current work provides practical contributions for professionals in the hotel setting, who come up with the challenge to enhance their customers' loyalty through higher expectations of employee behaviour.

In chapter, "[Women's Tourism Entrepreneurship: Digital Approach and E-Skills in Travel Business Marketing](#)", Marianna Kapota, Ioanna Giannoukou, and Constantinos Halkiopoulos focus on women's entrepreneurship in the tourism industry, emphasizing marketing and the use of digital tools. It explores the correlation between using e-skills and developing women-owned businesses in the tourism sector. Additionally, the paper examines the role of digital marketing and technological tools in promoting and enhancing the visibility of women-led travel agencies. Through the collection and analysis of research studies and business cases, the discussion highlights the importance of digital presence and e-skills in empowering women's entrepreneurship and fostering the development of the tourism sector. The results of this research will provide comprehensive guidelines for strengthening women's entrepreneurship in the tourism industry and developing effective marketing strategies, emphasizing the digital presence and the utilization of technological tools for travel agencies.

The chapter titled, "[Tourism Education and Digital Learning Environments: The Contribution of Transformative Learning](#)", is written by Sofia Kallou, Aikaterini Kikilia, and Michail Kalogiannakis. The main objective of this research is to investigate the effectiveness of digital learning environments in tourism education, both at the learning level and at the socio-emotional level, and the contribution of teaching methods to these outcomes, and more specifically the application of Transformative Learning versus the traditional lecture method.

In chapter, "[The Impact of Digital Space Development on Students in Tourism and Digital Media](#)", Simona Mălăescu, Claudia Chiorean, and Diana Foris present preliminary data of an experimental study exploring the rapport between multitasking, academic performance and burnout in students freelancing and working part-time in digital tourism, online booking platforms and digital media. The experimental group is exposed, gradually, to 1, 2, and 3 simultaneous stimuli, testing their performance in comprehension and retention of digital information, oral presentation in VR condition of a course, attention allocated to understanding information in digital space and managing the stress caused by multitasking. The study carried out is relevant in examining the level of understanding of Generation Z students who are exposed to the danger of burnout. This experiment contributes to the prevention of digital burnout due to multitasking, offering arguments in favour of organizing the activity in the online system and balancing the study time and work time during the student period. The data obtained about the correlation between multitasking and distributed attention, the level of understanding of an online text, and the perceived stress (a main factor of burnout), will be used to establish the need for a balance between online and physical tasks.

In chapter, “[Analyzing the Organizational Factors that Influence Hotel Employees’ Team Efficiency](#)”, Angelos Ntalakos, Dimitrios Belias, and Nikolaos Tsigilis examine the key organizational factors that influence employees’ effectiveness. The methodology used is a literature review via the PRISMA method. Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) focuses on reporting the reviews as well as evaluating the effects of interventions that relate to the key variables of leadership styles, organizational culture, communication, group dynamics, and team efficiency.

In chapter, “[Job Satisfaction Factors in the Greek Hotel Industry, in the Post-COVID Years. The Significance of Knowledge](#)”, Efstathios Velissariou, Georgia Alexandri, and Christos Amoiradis present the results of a research study that aimed to discover the factors that lead to job satisfaction of hotel personnel in Greece. In this context, based on the literature, many factors were examined which contribute to job satisfaction, such as working conditions, salary, company policy and administrative style, completion through work, relations with colleagues, and other factors. Emphasis was placed on the link between the level of knowledge and experience of staff and job satisfaction. The level of satisfaction was also correlated with other factors such as position of responsibility, seasonality of the job, the training provided, but also the level of quality of the hotel’s services. The best level of satisfaction was for the social environment, such as relationships with colleagues and supervisor, while the quality of a hotel is also reflected in employee satisfaction. The indications are that hotels in Greece should improve their working conditions and policy concerning employees to increase the level of job satisfaction, especially for the seasonal hotel employees.

The chapter titled, “[Crisis Leadership, Group Dynamics, and Change Management: A Literature Review and Future Perspectives](#)”, is written by Dimitrios Belias, Nikolaos Trihas, and Angelos Ntalakos. Over the past ten years, humanity has been witnessing a plethora of serious crises, including those related to finance, health, and climate. As a result of these crises several problems have been experienced in the global market, especially in the tourism and hospitality industry. Hence, Crisis Leadership, Group Dynamics, and Change Management are becoming more apparent in the academic community. The aim of the current study is an investigation on the influence of crisis leadership on group dynamics/change management, and the proposal of several tools to measure the above relationships. The methodology used in this paper is a literature review that synthesizes theoretical insights and empirical findings.

In chapter, “[Labour Mobility and Tourism. Challenges and Opportunities for Decent and Sustainable Work in the Tourism Sector. The Case of Greece](#)”, Ioanna Chatzopoulou presents the positive aspects of the labour mobility in the tourism sector and its implications for the social and economic life of migrant labourers. Furthermore, it refers to the inequalities in the tourism labour market, which affect disproportionately women, young people, migrants, and workers in the informal economy, due to the deficits in social and health protection that workers face, and to the gender-based violence and harassment in the tourism labour sector. Particular focus is placed on policies, strategies, good practices and on the relevant European and Greek protective legislation, towards a decent, fair, and sustainable work in the tourism sector.

The chapter titled, “[Building Resilient Hotel Workforce in the Era of Uncertainties: A Literature Approach](#)”, is written by Peter Kibe Njuguna and Artemis Giourgali. Various theories and empirical studies have been put across in tourism literature to advance the concept of resilience. Central to most of these theories is the contribution of the employees who work in those organizations. While workforce resilience is considered a developable and trainable skill, no consensus has yet been reached regarding to which extent individual resilience contributes to overall organizational resilience. The problem was made clearer by the recent disruptions brought about by the COVID-19 pandemic. The research presented in this paper uses a systematic literature review approach to dissect various theories and interrogate the place of the workforce in the whole resilience construct. The paper concludes by proposing an empirical study, especially in Africa where there exists a shortage of data on tourism resilience, specifically in the hotel subsector.

The chapter titled, “[Tell Me Where You Are From and I Will Tell You How Much You Get: The Role of Internal Marketing in the Tourism Industry](#)”, is written by Nikolaos Papamitsakis, Maria Argyropoulou, and Evi Chatzopoulou. The objective of this research is twofold; firstly, to investigate whether the race of an employee in a tourism business is a decisive factor in determining their remuneration, and secondly, what role does internal marketing play in mitigating, or not, this discrimination. In order to accomplish these research goals a structured questionnaire was created and distributed to employees and executive managers in the tourism sector. The results support the hypothesis that there is racial discrimination and, indeed, the majority of employees do perceive this discrimination both in salary and job positioning. Moreover, the results show the importance of internal marketing in fostering culture co-creation, a role that seems to be missing.

In chapter, “[To Stay or to Go! Exploring the Impact of Turnover Intention, Retention Strategies and Employee Surveys on Tourism Employee Retention in Zimbabwe](#)”, Barbara Mutadzakupa, Magdalena Petronella (Nellie) Swart, and Ciné van Zyl discuss the importance of employee retention in Zimbabwean hotels. It argues that work experience and a conducive work environment are not enough to ensure that employees stay on in their job. Tourism employees prefer places of work that offer exclusive, attractive work–life balance policies that are inclusive of retention strategies. This paper, therefore, examines the relationship dynamics among the dimensions of turnover intention, retention strategies, and employee surveys. The paper contributes to the body of knowledge on employee retention in the tourism industry and highlights the importance of adopting human resources (HR) practices that attract better applicants, retain productive employees, and reduce work–life conflict to enhance customer satisfaction experience and organisational performance.

The chapter titled, “[The Current State of Business Environment in Slovakia and Its Impact on Tourism Enterprises](#)”, is written by Lubica Sebova, Tomas Sokologorsky, and Radka Marcekova. The paper focuses mainly on the political, economic, social, and technical factors (PEST analysis) that influence the business environment, with an emphasis on tourism. Although there are studies that deal with the business environment, almost none of them identify the tourism sector. The object of this study

is tourism enterprises in Slovakia, focussing on the current tourism business environment. While examining the current state of the tourism business environment in Slovakia, the paper also defines possible opportunities for its further development.

In chapter, “[The Relationship Between Leadership Styles, Organizational Culture and Group Dynamics in the Hospitality Industry](#)”, Angelos Ntalakos, Dimitrios Belias, and Athanasios Koustelios examine the effect (positive or negative) of the variables of leadership styles (such as transformational) and organizational culture on the variable group dynamics in the hospitality industry. Although several types of research have been conducted that connect leadership styles and organizational culture, there seems to be an empirical gap in the connection between leadership styles, organizational culture, and group dynamics, especially regarding the hospitality industry. Hence, the current paper aims to shed light on this gap through empirical research which was conducted among employees of 4- and 5-star hotels. The outcome of the research reveals that there are connections between the above-mentioned factors.

The chapter titled, “[Unlocking the Potential: A Journey Towards the Empowerment of Women in the South African Tourism Sector](#)”, is written by Nasreen Tisaker, Magdalena Petronella (Nellie) Swart. According to the World Travel and Tourism Council (WTTC), female employment reduces poverty, sustains economic growth, and supports women’s empowerment and independence. This research aims to investigate the effect of Entrepreneurial Skill, Competence, and Autonomy on the empowerment of women in the South African tourism sector. The study findings indicate that women in tourism perceive themselves as having the entrepreneurial skills, competency, innovative ideas, independence, and autonomy necessary to succeed in the tourism industry, highlighting the relevance of these factors to Women in Tourism (WiT) in South Africa. This study makes a valuable contribution to understanding the potential of the empowerment of women in the South African tourism sector.

The chapter titled, “[Motivating Human Resources in the Hospitality Industry. A Literature Review](#)”, is written by Moschos Psimoulis, Christos Kakaroungkas, and Theodoros Stavrinoudis. The aim of this paper is twofold. It wants to codify human resources motivation theories and, to highlight their advantages in employee performance and hotel organization. In the context of analysing the concept of motivation, reasons related to human resources that enhance the performance of hotel employees are investigated. The Content Analysis methodology is employed, based on which the theories of motivation are classified in chronological order (per decade). In this way, the characteristics and impact of motivational theories on hotel human resources are highlighted. By documenting the evolution of motivation theories over time and connecting them to the motivation of employees in the hospitality industry, the present paper leads to an original codification of the theory that can be utilized by future researchers.

The chapter titled, “[Work Values as Projections of Personal Values at Work: Evidence from Tourism and Hospitality Students](#)”, is written by Emmanouil Papavasileiou, Dimitrios Stergiou, and Irini Dimou. Despite the importance of work values in students’ career development, little conceptual research has focused on articulating the dimensions represented within the construct, and the exploration of

empirical validity has been lagging. This paper provides evidence of validity for the conceptualisation of students' work values as projections of their personal values in the context of work. It uses data from a sample of Millennials who are tourism and hospitality students from Asia. From confirmatory factor analysis, it emerges that this conceptualisation is reliable and is better suited than competing theoretical models drawn on theory of work adjustment and self-determination theory. The intrinsic, extrinsic, prestige, and social typology provides a theoretically aligned approach, valuable to practitioners attempting to explain candidate employees' expectations towards work. It also connects the stream of work values research with the field of basic human values, directing future research within and beyond hospitality and tourism.

In chapter, "[Research Trends on Visitor's Intra-attraction Spatiotemporal Behaviour: A Literature Review](#)", Elsa Tavares Esteves and Márcio Ribeiro Martins present and discuss the contribution of research on visitors' space-time behaviour at intra-attraction level, stressing some theoretical aspects related to concepts, constructs and methodological options expressed in articles related with this topic, published in Scopus database. The search carried out in the Scopus platform reveals a growing interest in the visitors' space-time behaviour in tourism studies. The most productive authors, the most relevant journals and the research areas of published articles were identified. However, few articles specifically focussing on visitors' intra-attraction behaviour have been published. A content analysis was performed, and the geographic scale of analysis was identified as well as the methodology used. Analysing visitors' space-time behaviour at intra-attraction level allows facility managers to better understand visitor behaviour in different seasons, improving attractions and the overall tourist experience, contributing to more sustainable facility management.

In chapter, "[Increasing Revenue and Decreasing Cost: The Promotion of Direct Distribution Channels in Hospitality](#)", Tânia Vieira, Mónica Oliveira, and Teresa Pataco analyse the Revenue Management in hotels oriented to the promotion of direct sales channels, in order to increase the revenue of the units and to avoid possible expenses in commissions to third parties by the hotel, namely the indirect sales channels. In this case, the application of the Revenue Management concept is quite beneficial in that hotels can apply the proper procedures and strategic decisions to minimize commission costs and generate the optimal amount of revenue, which is the main objective of this study. This can be done by studying segmentation and understand what kind of benefits will be convenient for hotels to build direct loyalty without any other intervention. Through a literature review, as a basis of study, and the application of a study using quantitative methodology, creative proposals for rewards and strategies, and suggestions for good practices, are formulated to promote direct purchase by consumers and build loyalty so that clients book directly with the hotel unit.

In chapter, "[Adapted Tourism Offer for Visually Disabled Visitors Development of Tourism for All Through Service-Learning Activities](#)", Radka Marčeková and Ivana Šimočková examine the barriers to the participation of visually impaired persons in tourism and to underline the importance of service-learning activities

in university education so that such barriers are mitigated. The article highlights the importance of the third mission of universities on the example of a service-learning project dedicated to visually impaired visitors in the tourism industry. It evaluates the results of a primary qualitative survey, carried out with 32 visually impaired respondents through questions using the technique of in-depth interview. The research results point to the insufficient tourism offer for visually restricted visitors, and the numerous barriers they face in everyday life. The paper emphasizes the importance of the equal right of all tourism industry visitors to profit from tourism services and to achieve a comprehensive experience.

The chapter titled, “[Mining Association of Outliers in Time Series](#)”, is written by Maria Katsouda, Konstantinos Kollias, Constantinos Halkiopoulos, and Basilis Boutsinas. Outliers or extreme values are patterns in the data, which do not conform to a well-defined concept of normal behaviour. In today’s often changing environment, detecting, and forecasting outliers in time series related to stock market, credit card fraud, fraud in insurance systems, tourism demand indicators, etc., is a challenge for both humans and computers. This paper presents, for the first time, the association among the outliers in different univariate time series and Mining Association of Extreme Values (MAEV) is formally defined. The paper then investigates how MAEV can be applied to forecasting outliers in one time series, based on the detection of outliers in another time series. The efficiency of the proposed methodology is evaluated by applying it to hotel booking demand.

The chapter titled, “[A Needs Analysis of Mothers Travelling with Their Families in South Africa](#)”, is written by Rosa Naudé-Potgieter. This study conducted a needs analysis of mothers specifically travelling with their families to identify how accommodation establishments can improve their offering and be viewed as more “family-friendly”. The results of this study are discussed in terms of what holiday destinations and establishments need to improve so that their facilities are more family-friendly, which should assist establishments in gaining a stronger competitive advantage in the family holiday market.

In chapter, “[Exploring Greece’s Residents Travel Intention in the Post-pandemic Era Throughout the Imprint of Covid-19 on Their Travel Behaviour](#)”, Konstantinos Mouratidis, Maria Doumi, and Stelios Ioannidis examine the changes in the travel behaviour of Greeks during the COVID-19 pandemic and in the post-pandemic era. It focuses on recording and comparing the above changes based on two parameters: the geographic areas of permanent residence and their demographic characteristics. The empirical research was conducted among residents of Greece. A stratified random sampling was used in which each of Greece’s thirteen regions was regarded as a stratum. The findings reveal that the pandemic has affected the travel behaviour of the Greeks, both in correlation to the region of their permanent residence and to their demographic characteristics. The results of the research indicate the travel preferences of the Greeks, which are shaped by hygiene and safety rules as well as by particular health protocols related to both hospitality and transport.

In chapter, “[Intellectual Capital and Customer Satisfaction at Northern Portugal and Galicia Hotels](#)”, Helena Santos-Rodrigues analyses the relationship between intellectual capital and customer satisfaction in hotels in Porto (northern Portugal),

and Galicia (northern Spain). Specifically, the research aimed to find the determining aspects of intellectual capital in customer satisfaction, providing hotel facilities with ways to improve and enhance their results. A total of 239 hotel units from different categories were studied—19 one-star, 66 two-star, 70 three-star, 69 four-star and 15 five-star. Taking as independent variables all the dimensions of the three capitals (human, structural and relational), it seems that the creation and development of knowledge dimensions (structural capital), knowledge creation and training (human capital), relationship with stakeholders and collaboration networks (relational capital), contribute to explain 53% of the variability in customer satisfaction. These results provide several implications for stakeholders and organizational responsibility in the hospitality industry, as it allows us to determine some important aspects to consider in improving customer satisfaction.

The chapter titled, “[The Co-evaluation of a Circular Economy Self-Assessment Tool for Hotels](#)”, is written by Blanca De-Miguel-Molina, María De-Miguel-Molina, Ángel Peiró-Signes, and Daniel Catalá Pérez. Participating in the circular economy can be a challenge for small and medium hospitality organizations. To examine this problem, within the InnoEcoTur research project, an evaluation tool was created in partnership with different stakeholders that has followed a participatory process from development to evaluation, as explained in this paper. The co-evaluation of the tool allowed for its refinement and adaptation to the real environment of hospitality organizations, improving its serviceability and potential user experience. The methodology applied for co-evaluation is an unmoderated, remote, and exploratory usability test, developed from the literature and primary information obtained in the research project. This test has been completed by some experts in the sector. The results show that it is a useful tool, but it must be accompanied by some training, network support, information about suppliers, and consultancy when some specific data need to be retrieved or calculated. The results are relevant to hospitality organizations and their suppliers, as well as for circular economy policymakers.

In chapter, “[Activation of Motivational Factors from the Implementation of Total Quality Management in Hotel Businesses](#)”, Aristides Katsaitis, Fragkiskos G. Bersimis, and Paris Tsartas investigate the activation of human resource motivation factors with the satisfaction of high-value needs and the fulfilment of their expectations, in a sample of hotel businesses in the categories 4* and 5* of the Prefecture of Attica. A survey was conducted using an electronic questionnaire that included appropriate questions addressed to the Human Resources Managers of the 4* and 5* hotel units. The results indicate that hotel companies consider the effort of human resources important in a special human-centred environment, such as hotel companies, whose managements try to satisfy the important needs of their human resources to deliver higher performance through motivational factors. The fulfilment of the needs of the human resources is to a sufficient or very satisfactory degree of coverage in the human resources, whether these needs concern the working environment or the mental-emotional environment of the employee. Also, the human resources of hotel businesses have expectations, which the management knows and satisfies at a fairly high level, but the management’s expectations for satisfactory results from the employees are also very important. Human resources are considered

the main shapers of hotel products and services, since their work affects the quality of what they produce to satisfy the needs of the hotel customer.

Part Five—Sports and Wellness Tourism

The fifth part of the book consists of 10 chapters and aims at elaborating on different forms of sports tourism business. In particular:

The chapter titled, “[Sports Entrepreneurship and Crowdfunding in Local Communities: The Role of Social Media](#)”, is written by Ioulia Poulaki and Mary Constantoglou. Crowdfunding campaigns effectively benefit self-funded clubs, while the communication strategies through social media stimulate local communities to come together to support local sports clubs. The purpose of this paper is to highlight all these elements through the case of Chios Nautical Club, which constitutes the sports emblem of Chios Island since the men’s water polo team has been participating for four decades in the first division of this sport activity. With the slogan “One Team, One Island”, Chios Nautical Club has managed to raise a significant amount of money in a short period of time through a crowdfunding campaign by: (a) using an online fundraising platform, (b) motivating the local community to join its effort through the its social media, and, c) offering various donor incentives, prizes, and rewards.

The chapter titled, “[Specificities of Thermalism in Health Tourism: The Mediating Role of the Territory](#)”, is written by Filipa Brandão, Dália Liberato, João Duarte, Pedro Liberato, and Joana A. Quintela. This research proposes a development strategy for thermal springs in the north of Portugal through the identification of the currently existing health and wellness, tourism, cultural and heritage attributes in the region. A qualitative methodology is applied, through semi-structured interviews, with the objectives of (a) contextualizing thermal tourism in health tourism and, (b) identifying the specialized thermal services available in the thermal regions of Northern Portugal. The results show the existing difficulties in the sector, namely the marked seasonality of demand and human resources, the non-diversity of age among thermal users, the lack of innovative equipment, the impact of the COVID pandemic, the restrictions imposed on the thermal operation during the pandemic, the lack of tourist support structures, the scarcity of available and quality accommodation, the missing municipal and/or regional support, which permanently challenge the sector.

In chapter, “[The Influence of TQM and Innovation on Perceived Financial Performance in Sport and Recreation Industry](#)”, Alkistis Papaioannou, Panagiota Balaska, and Georgia Yfantidou analyse with a single-equation setting (using OLS estimation) the impact of total quality management (TQM) and innovation on perceived financial performance in sport and recreation enterprises. The results point out that TQM has a positive and statistically significant impact on innovation, while both variables (TQM and innovation) have a positive and statistically significant impact on perceived financial performance. These results have also been verified using a system of two simultaneous equations with Seemingly Unrelated Regression (SUR)

setting. Moreover, this study presents useful theoretical and managerial implications that can be used by sport and recreation services managers and practitioners to achieve better performance results.

The chapter titled, “[Hiking Tourism in Greece: A Legal Approach](#)”, is written by Polyxeni Moira, Dimitrios Mylonopoulos, and Aikaterini Kondoudaki. Hiking is a physical activity aimed at recreation and improvement of the physical condition. As a rule, this activity is carried out during holidays. However, hiking is often the main motivation for making the trip. Carrying out hiking as a leisure activity requires not only the existence of suitable hiking trails and supporting infrastructure, but also the establishment of the appropriate institutional framework. In this study, the institutional framework of hiking as an outdoor leisure activity, the institutional framework of supporting infrastructure as well as recent institutional arrangements in Greece are analysed over time.

In chapter, “[Glamping in Greece: Preliminary Findings from a Mixed-Methods Approach](#)”, Athina Nella and Foteini Dimopoulou examine glamping in Greece by presenting preliminary findings from a recent qualitative and quantitative research. The research aim was to examine perceptions about glamping both from the supply-side and the demand-side. Critical aspects of the glamping experience, profiles, and motivations of glampers, development prospects and perceived impact of the COVID pandemic were the main research foci. Qualitative research took the form of 14 in-depth interviews with glamping executives while 211 respondents participated in the survey. Analysis of profiles of glampers reveals relatively high levels of education, income and environmental consciousness. As per their motives and expectations, they seek authenticity, sustainability, serenity and escapism; nature and sea-centered activities are prerequisites while spa and yoga options would be highly appreciated. Overall, future behavioural intentions and camping development prospects in a post-COVID setting are promising while more emphasis is required in targeted communications.

The chapter titled, “[Football Stadiums as Alternative Tourists’ Entertainment Points of Interest: The Perceptions of Managers and Local Authorities in the City of Patras](#)”, is written by Alkiviadis Panagopoulos, Vasiliki Matika, and Ioannis A. Nikas. The objective of this paper is to provide an in-depth insight of the contribution of football stadiums to local and urban tourism development in areas with low tourism numbers and potentials, revealing those aspects that can upgrade them to places of higher tourist interest. This work focuses mostly on studying the development processes of a modern stadium, which is profiled as a venue providing various services and products, and especially on the national football stadium in the city of Patras in Western Greece. The initial results of the research show that the ownership of these stadiums affects their development as tourism products and as destinations, as well as impacting their financial management and organizational structure and policy.

In chapter, “[Sports and Tourism Connected to the Environment: A Critical Review](#)”, Ioanna Samartzi and Ourania P. Vrontou focus on an analysis of the connection between sports and tourism and the way that environmental concerns contribute to this interlinkage. The study delves critically into the basis of the connection so as to

understand the circumstances that create this relationship. At first glance, sports and tourism related activities share no common environmental principles. Surprisingly, the investigation will soon establish that their union is indisputable, especially when it comes to the practical setting of sport competition, sports events, and venues. The analysis was done by employing the content analysis of the sustainability theory, as well as the sport and tourism theories, as they developed over the past 30 years. The outcome of this study highlights the roots of this blend in line with the scope of the natural environment contribution, hopefully promoting a more sustainable sports tourism industry and a robust sport and tourism operation.

The chapter titled, “[Classical Versus Wellness Thermalism: The Case of Portuguese Thermal Establishments Before and After the COVID-19 Pandemic](#)”, is written by Alcina Nunes, Ana Margarida Pereira, Estelle Gonçalves, Jéssica Alves, and Maria José Alves. This study aims to analyse the evolution of the alternation of thermal users between wellness and classic thermalism in Portugal. The objective is achieved by applying exploratory and cluster data analysis to a Portuguese administrative database containing the number of user registers and revenues generated in the second decade of the twentieth first century. During this period, the wellness registers increased in most spas compared to the classic records, even if several thermal spas with a constant demand behaviour over time could be identified. Still, the financial value added by wellness consumers does not seem to follow the previously observed shift.

The chapter titled, “[Strategic Approach to Thermal Tourism During and After Covid-19](#)”, is written by Dália Liberato, Joana A. Quintela, Paulo Neto, Pedro Liberato, Filipa Brandão, and Elga Costa. The main objective of this work is to understand the challenges and strategies of the sector during and after COVID-19, namely whether the impact of the pandemic confirmed the need to reassess products and services, with complementary and composite offers that combine nature, sports, and nutrition, among others. To answer this objective, a qualitative methodology approach was used, drawing on semi-structured interviews. Referring to the challenges that the sector experienced during COVID-19, emphasis was placed on the increase in expenses associated with the disease (masks, sanitizers, and electricity), the lack of investment in the area, the high maintenance costs of the equipment due to the corrosiveness of the water, and the fact that wellness is still associated with luxury products, and therefore not affordable for everyone.

In chapter, “[How Sociodemographic Characteristics May Affect the Thermal User’s Perception of Illness, Quality of Life, Sleep Quality and Disability. A Portuguese Case Study](#)”, Alcina Nunes, Ana Margarida Pereira, Estelle Gonçalves, Jéssica Alves, and Maria José Alves aim to understand if the sociodemographic characteristics of thermal users influence the results obtained. A binomial logistic regression is applied to identify the user’s characteristics that affect the differences in their perception before and after treatments. The results show that, in general, after treatments the users’ perception is positive. However, only some characteristics of the users are statistically significant to explain such perceptions.

The editors and IACUDiT anticipate that readers of these two volumes will find the papers informative, thought provoking, and of value to their niche research areas.

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Contents

Tourism Perspectives in a Social and Business Environment—Current Developments and Experiences	
The Influential Role of Organizational Culture and Behaviour of Wood Companies in the Communication of Products in the Tourism Economy	3
Dimitrios Leontis, Maria Termentzoglou, and Ioanna Grigoriou	
Crisis Management in Business Tourism. An Empirical Study in the Iberian Peninsula	15
Fernanda Ferreira, Dália Liberato, Marta Sousa, Pedro Liberato, and Elga Costa	
Generational Diversity in Tourism Workforce: Evaluating the Reported Differences Across Cultural Clusters	31
Emmanouil F. Papavasileiou and Irini Dimou	
Accessibility in Tourism: Optimizing the Tourism Experience Through Social Sustainability Interpretation	45
Pedro Liberato, Dália Liberato, Ana Vieira, Teresa Mendes, Hugo Barreira, and Cristina Rodrigues	
Gender Gap in Tourism SME Innovation Practices	65
Susanne Marx and Michael Klotz	
The Digital Transformation of Hybrid and Virtual Meetings and Events in the Greek Meetings Industry	83
Athina Papageorgiou and Alexandra Chalkia	
Leaders' Psychopathic Traits in the Dynamic Context of Tourism Ventures: The Impact of Boldness on Managers' Unethical Leadership and Unethical Employees' Behavior Toward Customers	95
Vasiliki Chatzi and Aikaterini Galanou	

Women’s Tourism Entrepreneurship: Digital Approach and E-Skills in Travel Business Marketing 111
Marianna Kapota, Ioanna Giannoukou, and Constantinos Halkiopoulou

Tourism Education and Digital Learning Environments: The Contribution of Transformative Learning 143
Sofia Kallou, Aikaterini Kikilia, and Michail Kalogiannakis

The Impact of Digital Space Development on Students in Tourism and Digital Media 163
Mălăescu Simona, Chiorean Claudia, and Foris Diana

Analyzing the Organizational Factors that Influence Hotel Employees’ Team Efficiency 179
Angelos Ntalakos, Dimitrios Belias, and Nikolaos Tsigilis

Job Satisfaction Factors in the Greek Hotel Industry, in the Post-COVID Years. The Significance of Knowledge 209
Efstathios Velissariou, Georgia Alexandri, and Christos Amoiradis

Crisis Leadership, Group Dynamics, and Change Management: A Literature Review and Future Perspectives 225
Dimitrios Belias, Nikolaos Trihas, and Angelos Ntalakos

Labour Mobility and Tourism. Challenges and Opportunities for Decent and Sustainable Work in the Tourism Sector. The Case of Greece 245
Ioanna C. Chatzopoulou

Building Resilient Hotel Workforce in the Era of Uncertainties: A Literature Approach 257
Njuguna Peter Kibe and Artemis Giourgali

Tell Me Where You Are From and I Will Tell You How Much You Get: The Role of Internal Marketing in the Tourism Industry 275
Nikolaos Papamitsakis, Maria Argyropoulou, and Evi Chatzopoulou

To Stay or to Go! Exploring the Impact of Turnover Intention, Retention Strategies and Employee Surveys on Tourism Employee Retention in Zimbabwe 285
Barbara Mutadzakupa, Magdalena Petronella Swart, and Ciné van Zyl

The Current State of Business Environment in Slovakia and Its Impact on Tourism Enterprises 297
Lubica Sebova, Tomas Sokologorsky, and Radka Marcekova

The Relationship Between Leadership Styles, Organizational Culture and Group Dynamics in the Hospitality Industry 313
Angelos Ntalakos, Dimitrios Belias, and Athanasios Koustelios

Unlocking the Potential: A Journey Towards the Empowerment of Women in the South African Tourism Sector	341
Nasreen Tisaker and Magdalena Petronella Swart	
Motivating Human Resources in the Hospitality Industry. A Literature Review	359
Moschos Psimoulis, Christos Kakarougkas, and Theodoros Stavrinoudis	
Work Values as Projections of Personal Values at Work: Evidence from Tourism and Hospitality Students	375
Emmanouil Papavasileiou, Dimitrios Stergiou, and Irini Dimou	
Research Trends on Visitor’s Intra-attraction Spatiotemporal Behaviour: A Literature Review	383
Márcio Ribeiro Martins and Elsa Tavares Esteves	
Increasing Revenue and Decreasing Cost: The Promotion of Direct Distribution Channels in Hospitality	403
Tânia Vieira, Mónica Oliveira, and Teresa Pataco	
Adapted Tourism Offer for Visually Disabled Visitors Development of Tourism for All Through Service-Learning Activities	415
Radka Marčėková and Ivana Šimočková	
Mining Association of Outliers in Time Series	433
Maria Katsouda, Konstantinos Kollias, Constantinos Halkiopoulos, and Basilis Boutsinas	
A Needs Analysis of Mothers Travelling with Their Families in South Africa	445
Rosa Naudé-Potgieter	
Exploring Greece’s Residents Travel Intention in the Post-pandemic Era Throughout the Imprint of Covid-19 on Their Travel Behaviour ...	455
Konstantinos Mouratidis, Maria Doumi, and Stelios Ioannidis	
Intellectual Capital and Customer Satisfaction at Northern Portugal and Galicia Hotels	473
Helena Santos-Rodrigues	
The Co-evaluation of a Circular Economy Self-Assessment Tool for Hotels	487
Blanca De-Miguel-Molina, María De-Miguel-Molina, Ángel Peiró-Signes, Marival Segarra-Oña, and Daniel Catalá-Pérez	
Activation of Motivational Factors from the Implementation of Total Quality Management in Hotel Businesses	505
Aristeidis V. Katsaitis, Fragkiskos G. Bersimis, and Paris Tsartas	

Sports and Wellness Tourism

Sports Entrepreneurship and Crowdfunding in Local Communities: The Role of Social Media	523
Ioulia Poulaki and Mary Constantoglou	
Specificities of Thermalism in Health Tourism: The Mediating Role of the Territory	535
Filipa Brandão, Dália Liberato, João Duarte, Pedro Liberato, and Joana A. Quintela	
The Influence of TQM and Innovation on Perceived Financial Performance in Sport and Recreation Industry	555
Alkistis Papaioannou, Panagiota Balaska, and Georgia Yfantidou	
Hiking Tourism in Greece: A Legal Approach	571
Polyxeni Moira, Dimitrios Mylonopoulos, and Aikaterini Kontoudaki	
Glamping in Greece: Preliminary Findings from a Mixed-Methods Approach	587
Athina Nella and Foteini Dimopoulou	
Football Stadiums as Alternative Tourists' Entertainment Points of Interest: The Perceptions of Managers and Local Authorities in the City of Patras	595
Alkiviadis Panagopoulos, Vasiliki Matika, and Ioannis A. Nikas	
Sports and Tourism Connected to the Environment: A Critical Review	609
Ioanna S. Samartzi and Ourania P. Vrontou	
Classical Versus Wellness Thermalism: The Case of Portuguese Thermal Establishments Before and After the COVID-19 Pandemic	623
Alcina Nunes, Jéssica Alves, Estelle Gonçalves, Ana Margarida Pereira, and Maria José Alves	
Strategic Approach to Thermal Tourism During and After Covid-19 ...	641
Dália Liberato, Joana A. Quintela, Paulo Neto, Pedro Liberato, Filipa Brandão, and Elga Costa	
How Sociodemographic Characteristics May Affect the Thermal User's Perception of Illness, Quality of Life, Sleep Quality and Disability. A Portuguese Case Study	653
Alcina Nunes, Ana Margarida Pereira, Estelle Gonçalves, Jéssica Alves, and Maria José Alves	

**Tourism Perspectives in a Social
and Business Environment—Current
Developments and Experiences**

The Influential Role of Organizational Culture and Behaviour of Wood Companies in the Communication of Products in the Tourism Economy



Dimitrios Leontis, Maria Termentzoglou, and Ioanna Grigoriou

Abstract Undeniably, wood businesses within the tourism industry are presently undergoing a trajectory of development, grappling with a myriad of entrepreneurial challenges stemming from the systematic surge in tourism experienced in Greece during the post-covid-19 era. The wood industry holds a distinctive allure, exemplifying a discernible positive progression within the sector. This research endeavours to delve into the realm of organizational culture and behaviour exhibited by wood businesses, specifically with regards to promoting products within the tourism economy. Additionally, the study will scrutinize the works of fellow researchers and proffer recommendations for further augmentation. The employed methodology rests upon a foundation of comprehensive literature review, text analysis, and exploration of pertinent secondary sources. The anticipated outcomes of this investigation aspire to illuminate the profound impact of organizational culture and behaviour within wood businesses on the efficacious promotion of products within the dynamic landscape of the tourism economy.

Keywords Organizational culture · Organizational behaviour · Wood businesses · Tourism economy · Communication

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1 Introduction

The primary objective that shapes the framework of this paper revolves around examining the influence of organizational culture and organizational behaviour on Human Resource Management (HRM), with the aim of enhancing wood companies' performance and their efficiency, whereas at the same time promoting products within the tourism economy.

To date, wood companies have played a significant role in the production and provision of tourism products. As key players in the wood industry, they contribute to the creation of a diverse range of wooden products that cater to the specific needs and preferences of tourists. By offering wood-based tourism products, wood companies contribute to the overall attractiveness and competitiveness of the tourism destination, thus contributing to the overall economic efficiency of their industry (Trigkas et al., 2012).

Furthermore, the production and promotion of wood tourism products by wood companies generate economic opportunities and support local communities. They contribute to the growth of the tourism sector by attracting visitors, encouraging spending, and fostering sustainable development (Papadopoulos et al., 2014), hence helping in safeguarding and promoting cultural heritage.

Worth-mentioning is also their moderating role in ensuring sustainable tourism practices, for a large number of such companies have proven to be reportedly adhering to eco-friendly principles by sourcing their materials from responsibly managed forests and utilizing environmentally friendly production processes. This—of course—aligns with the rapidly growing demand for sustainable tourism products and enhances the destination's reputation as an eco-conscious and socially responsible tourism destination. (Papadopoulos et al., 2014).

This paper is guided by three central pillars or dimensions. The first dimension focuses on organizational culture, the second pertains to organizational behaviour, and the third and final dimension aims to emphasize the performance and development of tourism economy products generated by wood enterprises, particularly those operating at the forefront of the tourism sector during the summer months. Each of these dimensions undergoes meticulous examination through well-grounded scholarly research, including literature reviews, text analysis, and secondary sources. The researchers offer comprehensive evaluations of each specific aspect within these dimensions.

2 Literature Review

Organizational Culture

The term 'culture' holds significant significance within the realm of anthropological sciences, as well as in the examination of the traditions maintained by various societies. This term has garnered considerable attention in the aforementioned field

of study for over a century. Etymologically, the term ‘culture’ stems from the Latin verb ‘colere,’ which means ‘to cultivate.’ As such, culture becomes associated with cultivation, in the sense of education, while also being conceptually aligned with societal culture.

In the existing literature focusing on organizational contexts (Allaire & Firsirotu, 1984), there has been an observed attribution of ‘anthropomorphic,’ ‘sociomorphic,’ and ‘biomorphic’ characteristics to operating firms, a pattern commonly observed in wood companies. Specifically, it is frequently noted that operating firms establish specific objectives to ensure their longevity, growth, and long-term survival. Moreover, it is argued that firms possess their own personality, as evidenced by the distinctive characteristics of their internal environment and their unique requirements specific to the firm and the industry in which they operate (e.g. wood industry). Furthermore, operating firms are often regarded as ‘small societies’ (Allaire & Firsirotu, 1984).

Similar to the diversity in personalities among individuals, culture also displays variations. Consequently, different cultures contribute to the differentiation among existing societies. Following the same line of reasoning, diverse cultures within active firms ultimately set them apart from one another, even if they operate within the same industry, such as the wood industry (Allaire & Firsirotu, 1984).

Despite the mention and reference to the study of business culture by numerous researchers, such as Handy (1976), Hofstede and Bond (1984), Wilkins and Ouchi (1983), and Schwartz and Davis (1981), the precise definition of the term ‘organizational culture’ remains elusive. This gives rise to the inherent risk of an ambiguous interpretation of organizational culture, despite its growing popularity due to its frequent mention in conducted studies.

The aforementioned concern has been highlighted by both Allaire and Firsirotu (1984) and Schein (1986). However, Schein (1986) provides a distinct definition of organizational culture, describing it as follows: ‘It is a pattern of common basic assumptions that a group has learned through the process of solving external adaptation and internal cohesion problems, which have yielded satisfactory results and are deemed valid and subsequently passed on to new members of the organization as the correct way of perceiving, thinking, and emotionally processing similar problems’ (pp. 30–31).

Hofstede et al. (1990) define organizational culture by identifying seven distinct characteristics:

- Organizational culture is a comprehensive concept, encompassing groups of individuals within the same organization.
- Organizational culture exhibits resistance to change, as individuals tend to maintain their established perceptions and beliefs acquired through the learning process.
- Organizational culture is a socially constructed phenomenon, where different groups of individuals form distinct forms and types of culture.
- Defining organizational culture is a complex task, as it is an elusive concept that resists easy measurement and classification.

- Organizational culture is situated within the realm of humanities, closely intertwined with terms such as ‘myth,’ ‘ritual,’ and ‘symbol,’ which effectively describe this phenomenon.
- Organizational culture primarily encompasses specific patterns of thinking, values, beliefs, and ideas, rather than focusing solely on the organizational elements and objects present within it.
- Organizational culture is inherently rooted in history, as it is transmitted through prevailing traditions and habits.
- According to Martin et al. (2006), organizational culture rarely manifests as a one-dimensional construct. Instead, it is often characterized by the presence of subcultures within the company. These subcultures are closely linked to specific elements associated with the individuals comprising the organization’s workforce and the unique characteristics of their work nature and conditions.

Organizational behaviour

The field of organizational behaviour emerged during the early 1960s as a scientific discipline primarily concerned with studying the behaviour of human resources within firms. It is well-established that the behaviour of employees in a company is significantly influenced by actions directly aimed at them (Bourandas, 2005). The success of a firm plays a crucial role in shaping the behaviour of its employees. By comprehending, interpreting, and describing organizational behaviour, and by prior examination of the behaviour of human resources within a business, business owners can gather valuable information for both its development and its multifaceted growth (Bourandas, 2005).

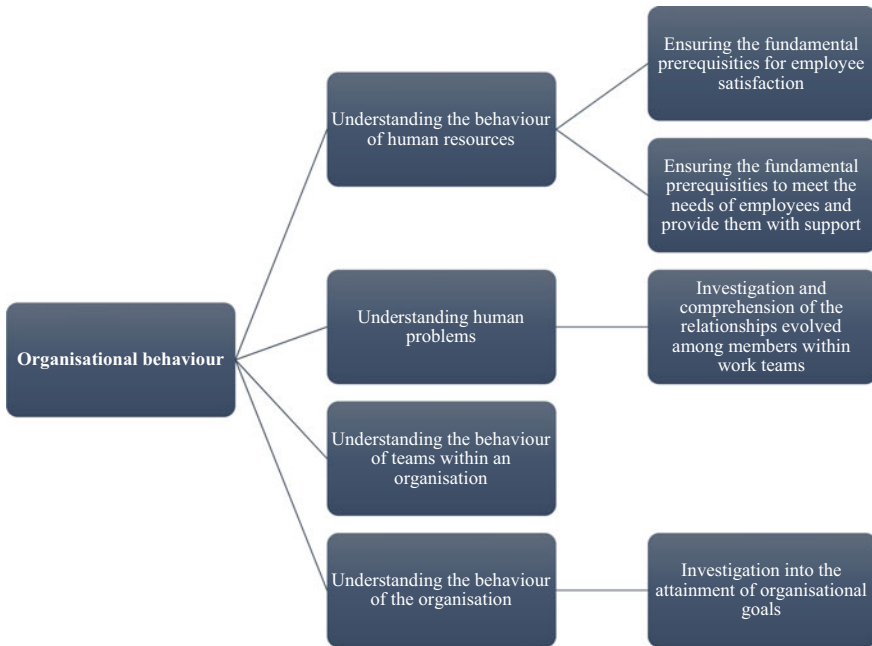
Numerous factors exert substantial influence on organizational behaviour. Examples of such determinants include the processes followed within an organizational context and the organizational structure (Bourandas, 2002). From an organizational behaviour perspective, it is imperative to adhere faithfully to the principles governing human behaviour, while acknowledging that businesses are social systems. Like all social systems, operating enterprises assign specific roles and responsibilities to the individuals constituting their human resources (Iordanoglou, 2008).

In today’s complex and volatile business environment, operating enterprises, including those in the wood industry, face the challenge of survival. In an attempt to deal with this rather competitive external environment, wood companies have laid their emphasis on their internal harmonious communication, which serves as a key indicator for ensuring the company’s well-being (Belias et al., 2017). Rapid advancements in technology and information science, combined with the need for flexibility in daily operational conditions, necessitate the creation of working groups within companies, accompanied by successive reforms of their internal environment. Therefore, the internal environment of operating companies must foster teamwork and cooperation among its human resources through espoused principles, values, and codes of ethics (Iordanoglou, 2008).

With regards to the wood industry companies, these strive to achieve their primary organizational objectives, which can only be realized through collective effort and

teamwork among all members of their human resources. Thus, in order to understand the functioning of these businesses, it is vital for business owners to have a clear and comprehensive understanding of issues intertwined with human behaviour in their internal environment (Iordanoglou, 2008).

Chart: Summary of Organizational Behaviour Scope



Source Specially designed own chart to cater to the needs of the under-review study.

Upon examining the aforementioned diagram, it becomes evident that the domain of organizational behaviour is multifaceted. It encompasses not only the behaviour of individuals comprising the workforce of organizations, but also involves deeper comprehension of human interactions and the challenges that ensue. Additionally, it entails the observation and comprehension of organizational behaviour itself. Therefore, organizational behaviour is focused on understanding human conduct, as well as studying the functioning of organizations and assessing the extent to which organizational and business performance objectives are accomplished.

The close correlation of organizational performance and growth with organizational behaviour

A plethora of studies and scholarly research, exemplified by the works of Newman and Maylor (2002), Macky and Boxall (2007), Qiao et al. (2009), Messersmith et al. (2011), Ang et al. (2013), García-Chas et al. (2014), Zhang et al. (2013), Mihail and Kloutsiniotis (2016), Kundu and Gahlawat (2016), and Heffernan and

Dundon (2016), have consistently demonstrated the positive association between organizational performance and both job satisfaction and organizational commitment (Rossidis et al., 2017). These comprehensive investigations have revealed that the implementation of high-performance work systems significantly influences the levels of job satisfaction among human resources and their respective evaluation, (Aspridis & Kyriakou, 2012) concurrently fostering a heightened sense of organizational commitment (Kefis & Aspridis, 2014). This, in turn, manifests as a diminished inclination to seek alternative employment opportunities.

More precisely:

Researchers	Date	Research final outcomes
Newman and Maylor	2002	Insufficient implementation of high-performance work systems (HPWS) to achieve sustained and elevated levels of organizational commitment. HPWS are a set of HR practices that are designed to improve employee performance and engagement. However, they are not a guarantee of organizational commitment
Boxall and Macky	2007	Positive and statistically significant relationship between the implementation of high-performance work systems (HPWS) and job satisfaction among employees. This means that as the implementation of HPWS increases, so does job satisfaction among employees. The relationship is statistically significant, which means that it is not due to chance
Qiao et al.	2009	Positive perceptions regarding the implementation of high-performance work systems by firms are positively correlated with levels of organizational commitment exhibited by human resources
Messersmith et al.	2011	The implementation of high-performance work systems (HPWS) has a positive and statistically significant impact on job satisfaction and organizational commitment among employees. The perception of the employee-employer relationship mediates this relationship, meaning that it is a significant factor that shapes the way in which HPWS influence organizational behaviour
Ang et al.	2013	The harmonious alignment of high-performance work systems (HPWS) with pre-existing human resource practices (HRPs) can have a favourable influence on employees, characterized by increased organizational commitment, job satisfaction, emotional affinity towards the organization, and reduced turnover intentions
García-Chas et al.	2014	The implementation of high-performance work systems (HPWS) has a positive and statistically significant impact on employee satisfaction with their working conditions and the overall work environment. HPWS also have a positive impact on employees' perceptions of their organization, leading to a more favourable view of the company
Zhang et al.	2013	The perception of the employee-employer relationship is a significant mediating factor in the relationship between the implementation of high-performance work systems (HPWS) and organizational behaviour. This means that the perception of the employee-employer relationship plays a key role in determining how HPWS influence the way employees behave in the workplace

(continued)

(continued)

Researchers	Date	Research final outcomes
Mihail and Kloutsiniotis	2016	The implementation of high-performance work systems exerts a statistically significant influence on the perceived dynamics of the exchange relationship between employees and their employers
Kundu and Gahlawat	2016	The adoption of high-quality work systems characterized by the prioritization of employee training and development, equitable compensation and performance evaluation practices, the fostering of positive relationships with colleagues and superiors, and the establishment of self-managed work teams with active participation in decision-making processes, yields a favourable impact on employees' levels of organizational commitment
Heffernan and Dundon	2016	The perceptions of employees regarding the procedural, interactive, and distributive justice embedded in the human resource practices implemented within their organization serve as a statistically significant mediating factor in the association between the adoption of high-performance work systems and their levels of job satisfaction, commitment to the employing organization, and burnout

3 Methodology

The research methodology employed in this study adopts a qualitative approach, especially through the utilization of a literature review. The main objective is to conduct a comprehensive examination and analysis of the topic under investigation. The perspectives concerning organizational culture and organizational behaviour in wood firms will be presented through the literature review. This carefully selected methodological approach does also encompass the exposition of key concepts and major events to underscore the significance of the research topic. To achieve this, a selection of primary texts and secondary publications pertaining to the subject matter, including historical studies, written documents, articles, reports, e-books, and online sources, have been chosen. Within this framework, the suitability of the literature review was evaluated, and the value of the research topic was critically appraised with the intention of generating novel insights and knowledge acquisition (Babbie, 2018; Saunders et al., 2014) (Fig. 1).

The under-investigation bar chart does clearly portray a clear and consistent pattern of growth in the wood sector spanning from 2019 to 2030. Notably, there is a noticeable stability in the levels of growth during the years 2029 and 2030, indicating a sustained upward trend. However, it is important to highlight that the years 2019 to 2021 experienced the lowest levels of growth within this period. This can be attributed to the outbreak of the unprecedented coronavirus pandemic, which profoundly impacted global economies, including the wood sector. The pandemic led to disruptions in supply chains, reduced consumer spending, and temporary closures of businesses, all of which contributed to a temporary slowdown in growth during

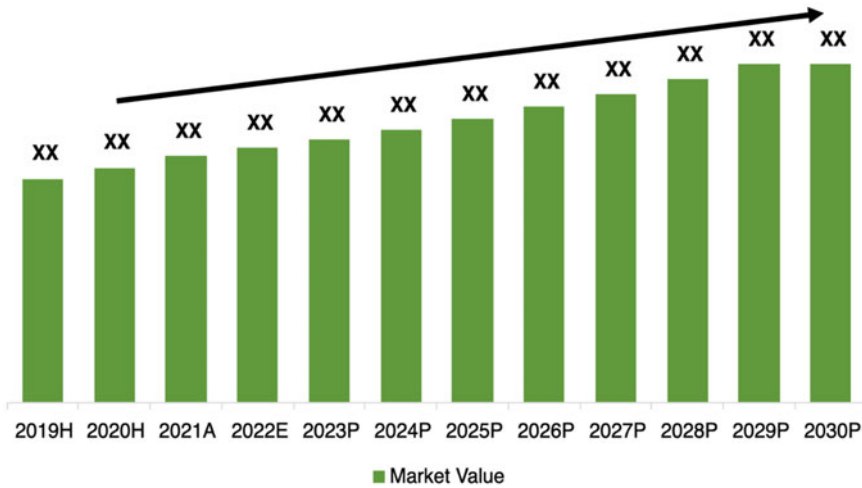


Fig. 1 Global wood-furniture market size for the period 2019–2030. Online available on the website: <https://dataintelo.com/report/wooden-furniture-market/> (as browsed on the 5 July 2023)

these years. Nevertheless, as the world gradually recovers and adapts to the new normal, the wood sector is expected to regain momentum and continue its upward trajectory of growth in the coming years.

4 Results

Upon careful consideration, the following results can be drawn:

- i. The adoption of high-performance work systems is positively correlated with employee satisfaction levels, their commitment to the organization, and their emotional closeness to the employment organization. This suggests that implementing effective work systems can contribute to a positive work experience and stronger organizational commitment.
- ii. High-performance work systems, when aligned with existing human resource practices, can enhance employee job satisfaction, organizational commitment, and reduce their intention to leave the organization. This highlights the importance of coherence and integration between different HR practices for fostering positive employee outcomes.
- iii. The implementation of high-performance work systems is associated with increased employee satisfaction with working conditions and the overall work environment. This implies that these systems can contribute to a positive work climate and improve employee perceptions of their work context.

- iv. The nature of the perception of the employee-employer relationship plays a significant role in shaping the impact of high-performance work systems on organizational behaviour. This suggests that employees' perceptions of their relationship with the organization influence how work systems affect their attitudes and behaviours.
- v. High-quality work systems, encompassing factors such as training, fair pay, performance appraisal, relationship quality, and participative decision-making, positively influence employees' organizational commitment. This indicates that comprehensive and well-designed work systems can foster stronger commitment among employees.
- vi. Employees' perceptions of justice in human resource practices mediate the relationship between high-performance work systems and job satisfaction, commitment to the organization, and burnout. This implies that perceptions of fairness in HR practices influence the extent to which work systems impact employee well-being and engagement.
- vii. The conclusive findings outlined above do underscore the vital significance of effective work systems, positive employee-employer relationships, and fair HR practices in enhancing employee satisfaction, commitment, and overall organizational performance.
- viii. The embrace of a strong organizational culture does have a direct impact on increased levels of organizational performance. This suggests that organizations with a strong culture tend to achieve better performance outcomes compared to those with weaker cultures.
- ix. The presence of an implicit positive culture towards the levels of organizational performance indicates that there is an underlying belief or attitude within the organization that values and promotes high performance. This implicit culture likely influences and reinforces behaviours and practices that contribute to improved performance outcomes.
- x. In brief, these outcomes highlight the importance of fostering a strong organizational culture and cultivating a positive mindset towards organizational performance, as they can significantly contribute to achieving higher levels of effectiveness and success.

5 Conclusion

Taking into consideration the influential role of organizational culture and behaviour of wood companies, several conclusions can be drawn from the provided information:

For starters, despite the challenging circumstances brought about by the coronavirus pandemic, wood companies seem to have been reportedly demonstrating resilience and optimism in their operations. This suggests that the organizational culture and behaviour within these companies have played a crucial role in their ability to adapt and navigate through difficult times.

Other than the above stated, the steady growth trajectory of the wood sector from 2019 to 2030 does indicate the profoundly positive impact of effective and combined employment of both organizational culture and behaviour. Companies that prioritize a strong organizational culture, characterized by values such as adaptability, innovation, and resilience, are better equipped to respond to external disruptions and maintain consistent growth.

Furthermore, the relative stability in growth levels between 2019 and 2030 proposes that the wood companies have successfully managed to establish a solid foundation for sustainable performance. This could be attributed to the development of a positive organizational culture and the implementation of effective behavioural strategies that promote long-term success.

Additionally, quite noticeable is the outcome drawn recommending that the lowest levels of growth observed during the initial years of the pandemic appear to play a part in stressing the vital part of organizational culture and behaviour in managing crisis situations. Companies with a strong organizational culture that foster proactive problem-solving, agility, and employee well-being are more likely to overcome challenges and recover swiftly from setbacks.

In conclusion, the analysis underscores the critical role of organizational culture and behaviour in shaping the performance and resilience of wood companies. A positive and adaptive organizational culture, coupled with effective behavioural strategies, can contribute to sustained growth, successful navigation of crises, and long-term success in the wood sector. Noteworthy is also their ability to help companies thrive in challenging circumstances, serving as facilitators in an effort to maintain stability during uncertain times, and, thus, contribute to the overall growth and development of the wood sector.

All in all, by fostering strong and positive cultures, wood companies can effortlessly augment their resilience, nimbleness, and ability to capitalize on new opportunities, thereby guaranteeing long-term success in the face of ever-changing market forces.

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Crisis Management in Business Tourism. An Empirical Study in the Iberian Peninsula



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Abstract The covid-19 pandemic has resulted in a significant humanitarian, social, and economic crisis, impacting various sectors, including tourism and hospitality. Among the affected segments, business tourism, which is a vital contributor to the local and regional economies and expected to grow, has also faced substantial challenges during this period. To understand and analyse the crisis management within the business tourism industry in the Iberian Peninsula, this research follows a qualitative methodological approach, through semi-structured interviews with entrepreneurs from the tourism sector in Portugal and Spain. The overarching goal of this study is to assess the impact of the covid-19 crisis on business tourism in the Iberian Peninsula. To achieve this, specific objectives include comprehending the effects of the pandemic on business tourism, identifying crisis management practices, and analysing the measures adopted by tourism professionals in response to the crisis. Key findings from the study emphasize the changes in events organization, such as exhibitions, congresses, fairs, and shows, which had to adapt to new social distancing policies, leading to cancellations, postponements, or a shift to online formats where

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possible. Additionally, significant changes due to health and safety concerns were observed, with Regional Entities and the national DMO (Turismo de Portugal) initiating initiatives like the Clean & Safe seal, implementing safety measures, and adapting products and services. The digital environment emerged as a critical platform for strategies during this time. Regarding crisis management practices, it was noted that many companies lacked a structured crisis management model, often resorting to reactive action plans when faced with specific challenges. Notably, the support received from the government was considered fundamental in managing the crisis, alongside effective communication among stakeholders, strategic marketing approaches, and the development of resilience. In conclusion, the covid-19 pandemic has significantly impacted the business tourism industry in the Iberian Peninsula, requiring adaptive measures, particularly in event organization, safety implementation, and digital strategies. The study also highlights the importance of crisis management practices, emphasizing the role of government support, communication, marketing, and resilience in navigating the challenges posed by the pandemic. These insights provide valuable guidance for the industry's future preparedness and response to crises.

Keywords Business tourism · Crisis management · Pandemic · Covid-19 · Iberian Peninsula

JEL Classification Z32

1 Introduction

The tourism industry has faced numerous crises throughout history, making it particularly vulnerable to global changes. It is sensitive to economic, political, and social crises, currency fluctuations, seasonal demand fluctuations, geological and meteorological risks, conflicts in air traffic control or reservation systems, terrorism, and epidemic and pandemic risks (Beni, 2011). The covid-19 pandemic has presented a unique challenge to the tourism sector, as it has been a global crisis occurring simultaneously. Business tourism has been significantly impacted as teleworking has reduced the need for travel (Seabra et al., 2021).

The concept of a crisis is discussed by various authors and can be summarized as an unpredictable event that threatens the expectations of stakeholders, encompassing economic, health, safety, and environmental issues, with potential serious impacts on organizational performance. Tourism products have unique characteristics that result in different impacts, as they cannot be stored for later use. When hotel rooms are cancelled during a crisis, they remain empty, and the revenue is lost and cannot be recovered. Crisis management in the tourism sector involves preventive measures to eliminate risk factors during the development and exploitation of tourism, as well as corrective measures after risks occur. The three phases of crisis management are before, during, and after a crisis.

This study focuses specifically on analysing two cross-border territories that comprise the Iberian Peninsula. The choice of these countries is related to the fact that tourism represents the largest export economic activity in Portugal, and Spain is one of the world's leading tourist destinations, ranking second in international tourist arrivals and third in tourist revenues. The tourism sector significantly contributes to GDP and job creation in these countries, and these values have been greatly affected by the covid-19 pandemic.

Despite its relevance to the tourism sector, there are few investigations on crisis management in business tourism. Therefore, this study aims to contribute to scientific knowledge in this area.

The general objective of this study is to assess the impact of the crisis caused by covid-19 on business tourism in the Iberian Peninsula. A qualitative methodology was chosen, and semi-structured interviews were conducted as the primary data collection method, considering it the most suitable technique for this study.

The applied research work is organized into five chapters. The first chapter provides an introduction, presenting the context and relevance of the study. The second chapter reviews the current and relevant literature, discussing the importance of the tourism sector in Portugal and Spain, business tourism, crisis management, and the covid-19 crisis. Chapter three focuses on the methodological framework of the investigation. Chapter four presents the analysis and discussion of the interview results, starting with a brief characterization of the participants and then discussing the results according to the specific objectives defined earlier. Finally, chapter five presents the conclusions of the study, addressing the research question and the outlined objectives.

2 Literature Review

2.1 The Importance of the Tourism Sector in Spain and Portugal

The tourism sector plays a crucial role in Spain and Portugal, contributing significantly to their economies and job creation.

In Spain, tourism is one of the main pillars of the economy. The country has long been a popular tourist destination, known for its rich cultural heritage, beautiful beaches, and vibrant cities. According to the World Travel & Tourism Council (WTTC), in 2019, the tourism sector in Spain contributed 14.3% to the country's GDP and employed approximately 2.9 million people, accounting for 15.3% of total employment (WTTC, 2020). Spain is ranked among the top tourist destinations globally, attracting millions of international visitors each year.

Similarly, in Portugal, tourism plays a vital role in the economy. Portugal has seen remarkable growth in tourism in recent years, becoming a sought-after destination for travellers. The country offers a diverse range of attractions, including historic

sites, stunning landscapes, and a rich cultural heritage. According to the WTTC, in 2019, tourism contributed 15.3% to Portugal's GDP and provided employment to approximately 1.2 million people, accounting for 16.6% of total employment (WTTC, 2020). Tourism has become the country's largest export economic activity, generating significant revenue, and fostering regional development.

2.2 Business Tourism and Its Importance

Within the broader tourism sector, business tourism holds significant economic importance. Business tourism, also known as MI (Meeting Industry), refers to travel for the purpose of attending or organizing business-related events and conferences. It encompasses a wide range of activities, such as conferences, trade shows, seminars, corporate meetings, and incentive trips.

Business tourism has a considerable economic impact at the local, regional, and national levels. It contributes to revenue generation, job creation, and the development of supporting industries. Business travellers often spend more and stay longer than leisure travellers, leading to increased consumption in the host destination. Additionally, business events attract international delegates, which can enhance the destination's global reputation and stimulate further tourism growth.

2.3 Crisis Management in the Tourism Sector

The tourism sector faces heightened vulnerability to various crises and disruptions, encompassing economic downturns, political instability, natural disasters, health emergencies, and terrorist attacks. Effective crisis management plays a pivotal role in minimizing adverse impacts resulting from such events and ensuring the rapid recovery of the tourism industry.

Crisis management in the tourism sector encompasses a comprehensive approach that involves both proactive and reactive measures. Proactive measures encompass risk assessment, contingency planning, and the implementation of preventive strategies to mitigate potential risks. Conversely, reactive measures focus on swift responses during a crisis, such as emergency communication, seamless coordination with stakeholders, and adapting tourism products and services to the evolving situation.

In 2019, Portugal showcased its economic significance in hosting business events, with 342 meetings taking place (ICCA, 2019). This success translated into securing a position among the top 10 destinations worldwide and ranking 7th in Europe for international events. Notably, Lisbon emerged as a standout location, holding an impressive 2nd position among world cities by hosting 190 meetings, while Porto, Portugal's second-largest city, claimed recognition by hosting 63 meetings and securing 39th position in Europe (ICCA, 2019).

Business travel and tourism spending for Portugal reached USD 5.8 billion in 2019, experiencing substantial growth from USD 1.6 billion in 2000 to USD 5.8 billion in 2019, with an average annual growth rate of 7.5% (Knoema.com, 2021).

In the same year, Spain demonstrated its prowess as a significant host for international events, accommodating 578 meetings and securing a remarkable top 4 position globally and top 3 in Europe. Barcelona emerged as the leading Spanish city, boasting 156 meetings, and achieving the 4th position among world cities, closely followed by Madrid with 154 events, ranking 5th worldwide (ICCA, 2019).

Despite fluctuations in recent years, business travel and tourism spending in Spain showed an upward trend from 2000 to 2019, culminating in USD 17.8 billion in 2019.

In 2021, Madrid earned prestigious recognition for the third consecutive year by being voted the best destination for meetings and conferences at the World Travel Awards. This accolade showcases the city's excellence and competitiveness as a destination and highlights its unwavering commitment to sustaining the business tourism sector, representing approximately 14% of the city's overall tourism. The international community's recognition acknowledges the tourism sector's dedication and efforts to maintain MI (Meeting Industry) activity, even amidst the challenges posed by the pandemic. Research conducted by the Madrid Convention Bureau (MCB) in 2021 further indicates that Madrid's MICE (Meetings, Incentives, Conferences, and Exhibitions) sector is anticipated to recover to pre-pandemic levels by the end of 2022 or early 2023 (Bureau, 2021).

The World Travel Awards also spotlight exceptional hotels in various tourism sectors, with the Hilton Diagonal Mar Barcelona hotel earning the distinguished title of World's Leading Business Hotel in 2021.

2.4 The Covid-19 Pandemic and Its Impact on Business Tourism

The covid-19 pandemic presented an unprecedented crisis for the global tourism industry, including business tourism. The implementation of travel restrictions, social distancing measures, and lockdowns significantly disrupted travel and event planning worldwide.

The pandemic led to the cancellation or postponement of many business events, as well as a decline in business travel due to travel restrictions and remote working practices. The shift towards virtual meetings and conferences also impacted the demand for physical event spaces and related services.

The crisis caused by the pandemic necessitated the implementation of strict health and safety protocols in the tourism industry. Destinations and businesses had to adopt measures such as enhanced cleaning and sanitation, social distancing, and contactless services to ensure the safety of travellers and staff.

In response to the crisis, governments and tourism organizations implemented various support measures, including financial aid, tax relief, and marketing campaigns to promote domestic tourism and aid in the recovery of the sector.

Overall, the covid-19 pandemic had a profound impact on business tourism, challenging the sector to adapt to new circumstances and implement innovative solutions.

2.5 *Business Tourism*

Business tourism encompasses activities undertaken by individuals during their trips and stays in foreign places for a consecutive period of up to one year, primarily for business or professional purposes. However, there is some debate and alternative definitions regarding the scope of business tourism.

Boniface and Cooper (2005) argue that business tourism, even when it involves remuneration, should be considered part of the broader concept of tourism since it involves the use of similar services and facilities. They also highlight that business trips often extend into leisure tourism when individuals choose to stay in the destination beyond their professional obligations.

Nicula and Elena (2014) define business tourism as a form of tourism with commercial, governmental, or educational purposes, where the recreational component of leisure is secondary.

Marques and Santos (2017) view business tourism as a comprehensive concept that encompasses activities, services, and events inherent to the broader tourism sector, including various meetings and events that take place in a destination.

Due to the fragmented and heterogeneous nature of the business tourism sector (Abulibdeh & Zaidan, 2017), different authors have classified this segment based on various analytical aspects, activities, or events (Marques & Pinho, 2021).

In recent years, the terminology used to define the set of events or activities related to business tourism has varied, leading to different acronyms. Examples include MECE (Meetings, Events, Conventions, Exhibitions), MCE (Meetings, Conventions, Exhibitions), CEMI (Conventions, Exhibitions, Meetings, Incentives), MC and IT (Meetings, Conventions, and Incentive Travel), MICE (Meetings, Incentives, Conventions, Exhibitions), and the Meetings Industry (MI) (Marques & Santos, 2017).

The concept of MICE or MI (Meeting Industry) was introduced in 2006 by organizations such as ICCA, MPI, Reeds Travel Exhibitions, and UNWTO to create a stronger image of the sector and standardize concepts. MICE or MI is commonly associated with business tourism.

Business tourism is widely recognized as a significant economic activity, and its development owes much to the effects of globalization, which has given rise to new work approaches, fostering the need for commercial, industrial, and knowledge expansion. Consequently, this has naturally led to an increase in business travel and professional events (Marques & Pinho, 2021).

What makes business events, in general, and business tourism, in particular, so appealing to destinations are several factors, such as low seasonality, controlled environmental impact, higher revenue for accommodation and meeting venues, a pronounced demand for food and beverages, and a boost in leisure activities (Alanzeh et al., 2019).

In 2018, business travel spending accounted for a substantial 22.5% of direct travel and gross domestic product from global tourism (ICCA, 2020; WTTC, 2021). This growth trajectory is expected to continue, with an annual projected increase of 3.1% until the year 2030 (UNWTO, 2011).

Moreover, business tourism doesn't just have a direct impact on the revenue generated from tourism activities itself, such as accommodation and transport services. It also has a close connection with leisure tourism. Visitors often extend their stay beyond the duration of the business event or professional obligations, allowing them to explore the region and contribute to local and regional development (Marques & Pinho, 2021).

3 Methodology

For this study, a qualitative research approach was chosen, and the primary data collection method employed was semi-structured interviews. Qualitative research allows for an in-depth exploration and understanding of the experiences, perspectives, and insights of the participants, which is particularly relevant when examining the impact of the covid-19 crisis on business tourism.

The use of semi-structured interviews provides a flexible framework for data collection, allowing for both pre-determined questions and the opportunity for participants to express their thoughts and experiences in their own words. This approach facilitates a deeper understanding of the meanings and interpretations individuals attach to their experiences in the business tourism sector during the crisis.

Minayo and Costa (2018) emphasize the importance of interviews as a primary technique in qualitative research, enabling researchers to construct knowledge about a specific object of study. Interviews offer advantages such as the exploration of rich and detailed information, flexibility in the use of language and expressions, better control of the situation, and the opportunity to assess the validity of responses. Additionally, interviews foster interaction and dialogue between the interviewer and interviewees, enabling a deeper exploration of the research topic.

The choice of semi-structured interviews aligns with the aim of capturing the impact of the covid-19 crisis on business tourism in the Iberian Peninsula. This approach allows for a comprehensive understanding of the experiences, perspectives, and management practices adopted by tourism professionals during the crisis.

By conducting interviews with entrepreneurs in the tourism sector in Portugal and Spain, the study will gather first-hand insights and experiences, providing a rich and nuanced understanding of the crisis management practices and the effects of the pandemic on business tourism in the region.

The research objectives for this study are as follows:

1. Understand the impact of the covid-19 pandemic on business tourism: This objective aims to explore and analyse the effects of the pandemic on the business tourism sector in the Iberian Peninsula. It involves investigating changes in demand, traveller behaviour, and the overall performance of the business tourism industry during the crisis.
2. Identify crisis management practices in the business tourism sector in the Iberian Peninsula: This objective focuses on examining the strategies and practices adopted by tourism professionals to manage the crisis caused by covid-19. It involves identifying proactive measures taken by organizations to mitigate the impact of the pandemic, such as implementing safety protocols, adapting products and services, and seeking financial support.
3. Analyse the measures adopted by tourism professionals in response to the crisis caused by the covid-19 pandemic: This objective aims to delve deeper into the specific actions and initiatives implemented by tourism professionals in response to the challenges posed by the pandemic. It involves studying the role of government support, communication strategies, marketing efforts, and resilience-building measures in addressing the crisis.

By addressing these specific objectives, the study seeks to provide a comprehensive understanding of the impact of covid-19 on business tourism in the Iberian Peninsula, as well as shed light on the crisis management practices and measures employed by tourism professionals to navigate the challenges posed by the pandemic.

The initial phase of the research process involved contacting potential interviewees to request their participation in the study. Contact was made through email, where the purpose of the investigation was explained, emphasizing the importance of the interviewee's contribution to the development of the study. It was also assured that the data acquired would be used solely for academic purposes. The interviews were conducted individually using the Zoom platform, and each interview was recorded with the prior consent of the interviewees through informed consent.

To facilitate the interview process, a script was prepared with three thematic blocks. The first block aimed to explore the interviewees' experiences with crisis management before the covid-19 pandemic. The objective was to understand if they had previously encountered crises and how they handled them. According to Ritchie and Jiang (2019) and Ritchie (2004), the initial phase of crisis management involves prevention and planning, emphasizing a proactive approach rather than a reactive one.

By delving into the interviewees' experiences with pre-pandemic crisis management, the study aims to gain insights into their preparedness, strategies, and approaches in handling crises. This understanding will provide a foundation for analysing the subsequent blocks, which focus on the response to the crisis caused by the covid-19 pandemic and the post-crisis phase in the business tourism sector.

Overall, the methodology employed in this study ensures the collection of primary data through qualitative interviews, allowing for a comprehensive exploration of the

impact of the pandemic and the crisis management practices adopted by tourism professionals in the Iberian Peninsula.

The second thematic block of the interview aimed to explore the strategies adopted by entities, organizations, companies, and associations in response to the crisis caused by the covid-19 pandemic. The questions focused on understanding the specific measures taken by the interviewees' respective entities to navigate the challenges posed by the pandemic. One important aspect discussed was the role of government support, which has been advocated by various authors such as Ritchie and Jiang (2021) and Aldao et al. (2021).

In addition to government support, other key aspects considered in the response and recovery phase were communication between stakeholders, marketing strategies, resilience, and entrepreneurship. According to authors like Yu et al. (2006), Scott et al. (2008), and Pennington-Gray et al. (2011), effective communication among stakeholders is crucial during a crisis. It helps in disseminating important information, maintaining trust, and coordinating efforts to address the challenges faced by the business tourism sector.

Marketing strategies were also discussed to adapt to the changing market conditions and promote the recovery of business tourism. Effective marketing efforts can help attract visitors, restore confidence, and showcase the safety measures and adapted services offered by the entities.

Resilience, both at the organizational and individual level, was considered an important factor in responding to the crisis. Resilient entities were able to adapt quickly, innovate, and find new opportunities amidst the challenges. Entrepreneurship was also highlighted as an emerging field in crisis management, where crises can serve as a catalyst for developing new opportunities and creating new resources.

By exploring the strategies adopted by different entities and considering the insights from these various aspects, the study aims to provide a comprehensive understanding of the measures taken by tourism professionals in response to the crisis caused by the covid-19 pandemic in the business tourism sector in the Iberian Peninsula.

In the final block of questions, the aim was to gather insights on the post-crisis phase, which involves reflection, evaluation, and feedback, as advocated by Ritchie and Jiang (2019). This phase is essential for long-term planning and learning from the crisis to better prepare for future challenges (Aldao et al., 2021).

By exploring the interviewees' perspectives on the post-crisis phase, the study aims to understand how entities in the business tourism sector in the Iberian Peninsula have evaluated their response to the covid-19 crisis. This includes assessing the effectiveness of the strategies implemented, identifying areas for improvement, and capturing lessons learned.

The findings from this phase will contribute to the overall analysis of the impact of the crisis on business tourism in the Iberian Peninsula and provide valuable insights for future crisis management in the industry.

4 Results

The study consists of eight interviews conducted with entrepreneurs in the business tourism sector in the destination, as they are considered to possess the most comprehensive knowledge of the challenges faced during a crisis, the practices adopted, and the future strategies implemented.

After collecting the data through the interviews, the analysis and interpretation were carried out using content analysis, which involved three stages (Miles et al., 2014). In the first stage, the information obtained from the interviews was synthesized through processes such as selection, focus, simplification, abstraction, and transformation. This involved reviewing the notes and transcripts of the interviews and extracting the key themes and insights relevant to the research objectives. In the second step, the synthesized information was organized and summarized, allowing for the drawing of conclusions. The data were categorized into groups based on the interviewees' responses to each interview question. This organization facilitated the identification of common themes and patterns in the data. The third stage involved drawing and verifying conclusions based on the collected data. This process of conclusion-drawing occurred as data was collected and analysed, and the conclusions were tested for validity. The agreement or disagreement among participants regarding certain subjects was also verified within each group created based on their responses.

The interview questions were designed to cover three main areas:

1. Pre-pandemic crisis management: This section aimed to identify previous crises experienced by the organizations, the measures adopted during those times, and the main challenges faced in crisis management in the tourism sector.
2. Current crisis caused by the covid-19 pandemic: This section focused on understanding the impact of the pandemic on the company's activity, the strategies adopted to cope with the crisis, and the significance of government support in the recovery process. Additionally, it explored the role of communication, marketing, and resilience in the recovery from the crisis. The data analysis and processing for this section were divided into three categories: consequences, strategies adopted, and key crisis management practices.
3. Strategies for the future: This section sought to understand the changes in event organization caused by the pandemic and the lessons learned from the crisis. It also inquired about the preparedness of companies in facing future crises with a crisis management plan.

By conducting in-depth interviews and analysing the data through content analysis, the study aims to gain valuable insights into the impact of the covid-19 crisis on business tourism in the Iberian Peninsula and the crisis management practices adopted by tourism professionals. The findings will contribute to understanding the challenges faced and the strategies implemented for recovery and future crisis preparedness in the business tourism sector.

The responses obtained from the interviews provide valuable insights into the pre-pandemic crisis management, the response to the covid-19 crisis, and the post-crisis phase in the business tourism sector in the Iberian Peninsula.

Here are the key findings from each thematic block:

4.1 Pre-pandemic Crisis Management

- (a) Crisis management models: Most interviewees reported that their companies or organizations do not have a structured crisis management model. Instead, they often adopt reactive action plans in response to specific problems.
- (b) Previous crises and measures adopted: The interviewees unanimously acknowledged that the tourism sector had experienced various crises, including economic crises like the one in 2008. Measures adopted during those crises typically focused on internal debt management and cost control.
- (c) Main challenges in managing a crisis: The main challenges mentioned by the participants were the unpredictability of events, effective communication between stakeholders, access to support, and maintaining team motivation.

4.2 Response to the Crisis Caused by the Covid-19 Pandemic

- (a) Consequences of the pandemic: The pandemic led to a sharp decline in sales and had a significant impact on the financial balance of company budgets. The tourism sector and associated services experienced a widespread reduction due to restrictions imposed to combat the pandemic.
- (b) Strategies adopted: Interviewees mentioned various strategies adopted in response to the pandemic, including cost control, human resources management, adaptation of tourism products and services, and preparation of the destination with a focus on sanitation and safety for tourists and employees. The “Clean & Safe” seal was implemented as an added value to address covid-19 concerns. Digital communication was also highlighted as a strategy.
- (c) Crisis management practices used: Government support was considered essential in the recovery from the crisis, and all interviewees reported having benefited from various support measures. While opinions on the sufficiency and timing of government support varied, there were differences in perception between interviewees from Portugal and Spain. Communication and marketing were deemed fundamental in recovering from the crisis, and promotional campaigns and customer experience reorganization were cited as examples.

4.3 *Post-crisis Phase*

- (a) Changes in events and meetings: The pandemic resulted in the cancellation of in-person events and meetings, leading to a significant focus on digital environments and the adaptation of services for remote events. The interviewees agreed that online events are here to stay, but some events should return to in-person formats, especially major cultural events.
- (b) Lessons learnt: Key lessons from the crisis included the importance of developing adaptive capacities, better risk management, fostering resilience, managing daily costs effectively, and supporting and involving the team.
- (c) The future: Perspectives on the future of the tourism sector in relation to crisis management varied among interviewees, with some expressing optimism and others feeling uncertain and demoralized.

Overall, the data obtained from the interviews offer valuable insights into the impact of the covid-19 crisis on business tourism in the Iberian Peninsula and shed light on the crisis management practices adopted by tourism professionals. These findings can inform future strategies for crisis preparedness and recovery in the business tourism sector.

5 Conclusion

The covid-19 pandemic has had an unprecedented impact on the tourism industry, causing a virtual standstill in tourism activities and forcing the sector to adapt and reinvent itself with sustainable strategies (Aldao et al., 2021). The severity of the pandemic's consequences was unlike any previous crises experienced by the tourism sector, affecting the entire world and causing significant economic repercussions. The restriction measures imposed by governments resulted in widespread closures of hotels and tourism establishments, leading to challenges in managing human resources, including non-renewal of contracts and layoffs (Ritchie & Jiang, 2021).

Another change occurred at the level of events. As the United Nations World Tourism Organisation (UNWTO, 2019) had pointed out, events such as exhibitions and shows had to adapt to new social distancing policies, such as limited seating. Large events such as congresses and fairs ended up being cancelled, postponed, or transformed into online events when possible (Aldao et al., 2021; Liberato et al., 2022, 2023). Gössling et al. (2020) also reported that large events were among the products that showed the most evident loss of demand during the pandemic.

One of the notable changes brought about by the pandemic was in the events segment. Large events experienced a significant loss of demand, reflecting the restrictions on gatherings and social distancing measures. Technological advancements played a crucial role in responding to the crisis, with digital communication becoming essential for quick adaptation and recovery of activities during lockdowns and restrictions (Aldao et al., 2021; Rogers, 2020; Sigala, 2020).

When it comes to crisis management practices, the interviewees expressed the difficulty of formulating a specific crisis management model without knowing the nature of the crisis they would face and the available resources. This contrasts with the idea proposed by some authors, such as Miller and Ritchie (2003) and Yu et al. (2006), who advocate for disaster management models tailored to specific crisis contexts.

In previous crises, measures adopted by organizations primarily focused on debt management and cost control. However, in response to the pandemic, strategies adopted included cost control, human resources management, adaptation of tourism products and services, destination preparation, and prioritizing the hygiene and safety of tourists and employees. Digital communication and technology played a pivotal role in enabling recovery efforts.

The concept of “entrepreneurship” emerged as a significant aspect of crisis management, as interviewees recognized that the pandemic presented both challenges and opportunities. While the crisis brought financial difficulties, it also served as a motivation to explore new opportunities and create resources, such as leveraging digital platforms for service provision.

Overall, the findings from the interviews shed light on the unique challenges and strategies employed in managing the crisis caused by the covid-19 pandemic in the business tourism sector in the Iberian Peninsula. The pandemic has prompted the tourism industry to adapt, innovate, and consider new avenues for growth and resilience in the face of future crises. The lessons learned from this experience will undoubtedly play a vital role in shaping the future of the tourism sector and informing strategies for crisis preparedness and recovery.

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Generational Diversity in Tourism Workforce: Evaluating the Reported Differences Across Cultural Clusters



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Abstract This study evaluates for the first time the reported differences between Millennials and the preceding generations—Generation X and Baby Boomers—of tourism workforce across cultural clusters—Germanic, Anglo, Eastern European and Southern Asian. The evaluation is presented in terms of effects sizes from pairwise comparisons in a number of aspects of tourism work and employment including, variety and change, withdraw behaviors, work-life balance, job security, autonomy, pay, attachment to the organization, stimulation and co-workers relationships. Although the findings were similar among cultural clusters, Dutch Millennials, contrary to their counterparts in the US and Cyprus, placed less importance than the preceding generations on aspects related to pay. Similar differences were also found in aspects related to mobility and work-life balance. Thus, the future development of this field of inquiry will require a better understanding of the impact of national culture.

Keywords Generational diversity · Millennials · Tourism · Hospitality

JEL Classification J62

1 Introduction

The past few years, the exponential growth of tourism, into one of the world's largest sectors has driven the need for its maturation as a field of management inquiry (Papavasileiou & Tzouvanas, 2021). While this rapid growth has undoubtedly been gratifying to those interested in areas of management related to policies, customers and/or the environment, it also raises concerns about whether tourism has substantially developed into a stream of research with high relevance for aspects related to the management of work and employment. Toward this end, it could be said that

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tourism research “is not there yet” mainly because “work and employment remains a neglected area of enquiry for tourism researchers relative to its importance within the industry (Ladkin et al., 2023, p. 2)”.

There are signs of change as exemplified by recent reviews of diversity management (e.g., Gajjar & Okumus, 2018; Kalargyrou & Costen, 2017) which provide a constructive attempt to explore aspects of work and employment within tourism research. Kalargyrou and Costen (2017, p. 108) conclude their analysis by stressing that it is “imperative to study the under-researched area of age diversity and develop new paradigms”. We argue that generational diversity is this new paradigm because unlike age diversity, which may be objectively considered as a biological fact, generational diversity represents a social phenomenon, resulting from age-based group interactions with their immediate environments and with the broader culture in their quest to develop an understanding of themselves and others (Papavasileiou, 2017). As such, the topic of generations in tourism work and employment is topping the list of the most impactful diversity articles in tourism research (Mohammadi et al., 2022). Furthermore, the problems inherent in successfully managing generational conflict are among the most cited current human resource challenges in organizations (Richards et al., 2023). Within this context, the aim of the study is to evaluate generational diversity in tourism workforce across cultural clusters using the reported means and standard deviations of the observed differences. In doing so, we address the call from Gajjar and Okumus (2018, p. 921) for “a more nuanced approach in identifying generational differences”.

2 Literature Review

The term “generation” has been most commonly adopted to denote a group of individuals who share birth years and have experienced the same historical life events as they move through time together (Papavasileiou & Stergiou, 2023). Within the context of tourism work and employment, literature reviews (e.g., Papavasileiou, 2016; Sakdiyakorn & Wattanacharoensil, 2018) identify three prevalent generations: those born between the end of World War II and the early-to-mid 1960s (Baby Boomers and hereafter Boomers); those born between the early-to-mid-1960s and the late-1970s to early-1980s (Generation X and hereafter Xers); and those born from early-1980s to the late-1990s (hereafter Millennials). In each case, the classification of the workforce along these three age-based groups is based on the assumption that the meeting point of birth groups and historical process creates a two-dimensional space, a “generational location” capable of objectively positioning each generation across the pattern of social structure.

To accomplish the aim of the study, we searched the empirical evidence offered in studies included in the above-mentioned reviews of generational diversity in tourism research. Table 1 gives the characteristics of the 43 studies with empirical evidence included in these reviews in terms of (a) focus (intra or cross-generational), (b) type of data (qualitative or quantitative) and (c) whether the means and standard deviations

of the observed differences were reported. Taking into consideration that our aim is to provide evaluation of the observed differences between Millennials and the preceding generations of tourism workforce, we focused only on cross-generational studies.

The studies that provided intra-generational evidence (numbered 1 to 24 in Table 1) were excluded from the analysis. In the same vein, the cross-generational studies that provided qualitative evidence (numbered 25, 26 and 27 in Table 1) and those that did not report the means and standard deviation (numbered 28 to 35 in Table 1) were also omitted from further analysis. Following this procedure, eight studies (numbered 36 to 43) were included in our analysis.

3 Methodology

The cultural contextualization, in line with prior studies of generational diversity in international human resource management (e.g., Papavasileiou & Lyons, 2015), was based on the Global Leadership and Organizational Behavior Effectiveness (GLOBE) cultural clustering—Southern Asia, Confucian Asia, Sub-Saharan Africa, Arab, Latin Europe, Eastern Europe, Germanic Europe, Nordic Europe, Anglo and Latin America—developed by Gupta et al. (2002) (see Table 2).

The evaluation of the observed differences, in line with prior studies of generational diversity in business psychology (e.g., Twenge, 2010), is performed by calculating the effect sizes from the reported means and standard deviations, in terms of Cohen's *d* statistic (small = 0.02, medium = 0.05, large = 0.08). During each evaluation, Millennials' work aspect mean was subtracted from the older generation's mean so as a positive *d* reflects that the older generation's work aspect mean score was higher and a negative *d* reflects a lower work aspect mean score. However, taking into consideration that no two studies assess exactly the same aspect of work and employment in tourism workforce, the evaluations were aggregated into 10 thematic categories (see Table 2). For instance, aspects related to loyalty, dedication and commitment were aggregated into the thematic category of attachment to the organization. In a similar vein, aspects related to turnover intention and intention to quit were combined into withdraw behaviors, aspects related to salary and rewards into pay and aspects related to variety and change into one category variety and change.

Table 1 Literature on generational diversity in tourism workforce

Studies ^a	Focus	Data	Means/SD
1. Barron et al. (2007)	Millennials	Qualitative	N/A
2. Brown et al. (2015)	Millennials	Qualitative	N/A
3. Dhevabanchachai and Muangasame (2013)	Millennials	Qualitative	N/A
4. Fok and Yeung (2016)	Millennials	Qualitative	N/A
5. Leask et al. (2013)	Millennials	Qualitative	N/A
6. Rodríguez and Gregory (2005)	Millennials	Qualitative	N/A
7. Bednarska (2016)	Millennials	Quantitative	Yes
8. Brown et al. (2014)	Millennials	Quantitative	Yes
9. Choi et al. (2013)	Millennials	Quantitative	No
10. Hertzman et al. (2015)	Millennials	Quantitative	No
11. Josiam et al. (2008)	Millennials	Quantitative	No
12. Josiam et al. (2009)	Millennials	Quantitative	No
13. Josiam et al. (2010)	Millennials	Quantitative	No
14. Kellison et al. (2013)	Millennials	Quantitative	No
15. Kong (2013)	Millennials	Quantitative	No
16. Kong and Yan (2014)	Millennials	Quantitative	No
17. Kong et al. (2015)	Millennials	Quantitative	No
18. Kong et al. (2016)	Millennials	Quantitative	No
19. Maier et al. (2015)	Millennials	Quantitative	Yes
20. Maxwell et al. (2010)	Millennials	Quantitative	Yes
21. Richardson (2010)	Millennials	Quantitative	Yes
22. Richardson and Butler (2012)	Millennials	Quantitative	Yes
23. Richardson and Thomas (2012)	Millennials	Quantitative	No
24. Tews et al. (2015)	Millennials	Quantitative	No
25. Arendt et al. (2014)	Age grouping	Qualitative	N/A
26. Barron et al. (2014)	BB-GX-ML	Qualitative	N/A
27. Gursoy et al. (2008)	BB-GX-ML	Qualitative	N/A
28. Becker and Gao (2010)	GX-ML	Quantitative	No
29. Gladwell et al. (2010)	BB-GX-ML	Quantitative	No
30. Kim et al. (2016a)	ML vs Older	Quantitative	No
31. Ladkin and Weber (2010)	BB-GX-ML	Quantitative	No
32. Lu and Gursoy (2016)	BB-GX-ML	Quantitative	No
33. Lub et al. (2011)	GX-ML	Quantitative	No
34. Mohsen (2016)	ML vs Older	Quantitative	No
35. Young et al. (2013)	BB-GX-ML	Quantitative	No
36. Chen and Choi (2008)	BB-GX-ML	Quantitative	Yes
37. Chi et al. (2013)	BB-GX-ML	Quantitative	Yes

(continued)

Table 1 (continued)

Studies ^a	Focus	Data	Means/SD
38. Gursoy et al. (2013)	BB-GX-ML	Quantitative	Yes
39. Kim et al. (2016b)	GX vs ML	Quantitative	Yes
40. Lub et al. (2012)	BB-GX-ML	Quantitative	Yes
41. Park and Gursoy (2012)	BB-GX-ML	Quantitative	Yes
42. Solnet and Kralj (2011)	ML vs Older	Quantitative	Yes
43. Zopiatis et al. (2012)	BB-GX-ML	Quantitative	Yes

Note ^a Studies represent the studies included in Papavasileiou's (2016) and Sakdiyakorn and Wattanacharoensil's (2018) literature reviews; **N/A** = Not applicable; **BB** = Baby Boomers; **GX** = Generation X; **ML** = Millennials

4 Results

4.1 Co-worker Relationships and Withdraw Intentions

Table 3 gives that the evaluation of the observed differences from the Anglo (Chen & Choi, 2008) and the Eastern European clusters (Zopiatis et al., 2012) depicts Millennials to place more importance on aspects related to co-worker relationships than the preceding generations ($-0.66 < d > -0.07$). In a similar vein, findings from the Germanic and the Anglo clusters (Table 3) reveals that Millennials have a higher tendency for turnover than the preceding generations ($-0.59 < d > -0.19$).

4.2 Variety, Change and Work-Life Balance

The results from the Anglo (Chen & Choi, 2008; Gursoy et al., 2013) and the Eastern European clusters (Zopiatis et al., 2012) reveal a tendency for Millennials to place more importance than the preceding generations on aspects related to variety and change ($-0.54 < d > -0.15$) and work-life balance ($-0.44 < d > -0.06$) (see Table 3). However, it has to be noted that in relation to work-life balance, the evaluation of the differences in the Germanic cluster (Lub et al., 2012) based on the aggregated score of four items (*Flexible work hours, policies that support working parents, the opportunity to change to a part-time contract if needed, the opportunity to adapt my work schedule to family obligations*) indicates that although Dutch Millennials tend to place more importance than Boomers ($d = -0.19$), when compared with Xers ($d = 0.34$) they place less importance.

Table 2 Cultural clustering of generations and thematic categories of work and employment

Studies	Origin	Culture	Withdraw behavior	Work-life balance	Security	Autonomy	Pay	Attachment to organization	Stimulation	Co-workers	Variety and change
Chen and Choi (2008)	United States	Anglo-Saxon		+	+	+	+		+	+	+
Chi et al. (2013)	United States	Anglo-Saxon									
Gursoy et al. (2013)	United States	Anglo-Saxon		+							
Kim et al. (2016b)	South Korea	Southern Asia	+					+			
Lub et al. (2012)	Netherlands	Germanic	+	+	+	+	+	+	+		
Park and Gursoy (2012)	United States	Anglo-Saxon						+			
Solnet and Kraij (2011)	Australia	Anglo-Saxon	+					+			
Zopiatis et al. (2012)	Cyprus	Eastern European		+		+	+	+		+	+

Note + denotes from which study the reported means and standard deviation was taken per aspect of work and employment

Table 3 Differences between millennials and the preceding generations

Millennials scoring	Aspects of work and employment in tourism	Cultural context	Effect sizes (<i>d</i>)	
			Highest	Lowest
Higher	Co-workers relationships	Anglo, Eastern European	-0.66	-0.07
	Withdraw behaviors	Germanic, Anglo, Southern Asian	-0.59	-0.19
	Variety and change	Anglo, Eastern European	-0.54	-0.15
	Work-life balance	Anglo, Eastern European, Germanic ^a	-0.44	-0.06
	Mobility	Anglo, Germanic	-0.69	-0.34
	Pay	Anglo, Eastern European, Germanic ^a	-0.40	-0.09
Lower	Stimulation	Anglo, Germanic ^a	0.58	0.20
	Autonomy	Anglo, Germanic	0.39	0.12
	Attachment to the organization	Anglo, Germanic, Eastern European	0.82	0.31
	Job security	Anglo, Germanic	0.51	0.04

Note ^a Lub et al.'s (2012) evaluation of Dutch data provide contradictory findings, ^b Zopiatis et al.'s (2012) Cypriot data provide contradictory findings

4.3 Pay

The outcome of the evaluations (see Table 3) from the Anglo (Chen & Choi, 2008) and the Eastern European clusters (Zopiatis et al., 2012) suggests that Millennials place more importance than the preceding generations on economic rewards ($-0.40 < d > -0.09$). However, as witnessed above, Lub et al.'s (2012) data evaluation in relation to salary assessed as the aggregated score of five items (a competitive salary, an above average salary for this position, opportunities for promotion, performance-related pay, rewards for individual performance) illustrates Dutch Millennials as placing less importance than both Boomers ($d = 0.07$) and Xers ($d = 0.29$).

4.4 Mobility

The evaluation of the observed differences in the Anglo cluster, based on Solnet and Kralj's (2011) Australian data (which combined Xers and Boomers in one group), reveal that Millennials are more likely than the preceding generations ($d = -0.34$) to switch jobs, measured as the aggregated score of three items (i.e., *To me, switching jobs is kind of fun*). However, Dutch data, representing the Germanic cluster (Lub et al., 2012), show that although Millennials place more importance than Boomers

($d = -0.69$) on intra-organizational mobility (measured as the aggregated score of three items: *the opportunity to work for a different department*; *the opportunity to get another job within this organization*; and *support in finding other positions within this organization*), Xers ($d = 0.08$) tend to place more importance to this work aspect than Millennials.

4.5 Job Security and Autonomy

The results from the evaluation of the observed differences in the Anglo (Chen & Choi, 2008; Solnet & Kralj, 2011) and the Germanic clusters (Lub et al., 2012) indicate that Millennials tend to place less importance than the preceding generations on aspects related to job security ($0.51 < d > 0.04$) and autonomy ($0.39 < d > 0.12$).

4.6 Stimulation

Chen and Choi's (2008) data reveal that Millennials place less importance than both Xers ($d = 0.20$) and Boomers ($d = 0.58$) on intellectual stimulation, assessed as a composite measure of three items (have to keep solving problems, are mentally challenged, need to be mentally alert). However, the Dutch data (Lub et al., 2012) provide a different outcome; while the comparison between the successive generations shows that Millennials place less importance than Xers ($d = 0.24$) on stimulating jobs, assessed as a composite measure of 12 items (i.e., *challenging work*, *work that allows me to express myself*, *work that gives me the opportunity to learn*). The comparison between Millennials and Boomers shows that Millennials place more importance than Boomers ($d = -0.56$).

4.7 Attachment to the Organization

The evaluation of data from four cultural clusters, Anglo (Solnet & Kralj, 2011), Germanic (Lub et al., 2012), Eastern European (Zopiatis et al., 2012) and Southern Asian (Kim et al., 2016b), suggests a tendency for Millennials to be less attached to the organization than the preceding generations, with effect sizes ranging from close to moderate to high ($0.31 < d > 0.82$).

5 Conclusion

Over the course of the past fifteen years, a new research stream has emerged in the wider diversity management literature, investigating the phenomenon from the lens of generations, with emphasis on the differences between Millennials and the preceding generations of the workforce. Although the progress in the number of publications has undoubtedly been beneficial to those interested in the topic, it also raises questions about whether this field of diversity management can develop into a stream with high relevance for tourism research and practice. Toward this end, it could be said that despite the fact that our study revealed a number of significant differences between the Millennials and the preceding generation of hospitality workforce, further inquiry is required in order to obtain a better understanding and explanation of such differences. The future development of this field of inquiry will require a better understanding of the impact of national culture.

Although the evaluation of the observed differences in most cases yield similar findings among cultural clusters, Dutch Millennials, contrary to their counterparts in the US and Cyprus, placed less importance than the preceding generations on aspects related to pay. Similar differences were also found in aspects related to mobility and work-life balance. Qualitative work from Unite et al. (2014) across several countries also indicates that generational characteristics differ according to national context. Even among Millennials, who have been considered as a “global generation”, evidence suggests that national culture can have an impact on their work values priorities (see Papavasileiou & Lyons, 2015). This has particular resonance in the tourism setting, given the multi-national nature of the workforce and the employment of many immigrants and expatriates in the industry. Future studies should aim to include international samples and use nationality (or even better national culture) as a control variable to avoid confounding data across multiple nationalities.

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Accessibility in Tourism: Optimizing the Tourism Experience Through Social Sustainability Interpretation



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Abstract Accessibility has become one of the main key issues in tourism today, as it determines the extent to which an individual can participate in the activities/experiences provided by the sector in each destination. It ensures that all products, services, and facilities will be developed for everyone to use and that all will benefit from them. This is reflected in the accessibility related to the absence of obstacles to the use of the tourism product still present in the infrastructures, public transport, information, technology, or communication services. The improvement in accessibility may ensure opportunities for access, safely and autonomously, to equipment,

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transport, spaces, and information, allowing most segments to participate in all activities of daily life in an independent, comfortable, safe, and without discrimination of any kind. This research establishes the objective of identifying the accessibility measures adopted in the cities of Braga and Guimarães, in the Northern Region of Portugal, through issues related to the specific training of employees, the use of new technologies as a competitive advantage, the concern with presenting information in various formats and the appropriate means of transport. For the collection and analysis of information, the qualitative method was selected, an exploratory descriptive study, based on semi-structured interviews conducted with the official responsible, stakeholders, interpreter guides, and associations of each tourist destination. The results show that, despite the improvements diagnosed in recent years, the regions still face some barriers. The measures frequently identified with the aim of optimizing accessibility in tourism destinations were specifically the use of access ramps (removable or definitive) and the introduction of adapted toilets.

Keywords Tourism · Accessibility · Social sustainability · Historical and cultural heritage · Braga · Guimarães

JEL Classification Z32

1 Introduction

Accessibility has become one of the key issues in tourism today. It ensures that all products, services, and environments are designed for everyone to use and that everyone benefits from them (Darcy et al., 2010; Dominguez et al., 2019; Eusébio et al., 2020; Gillovic & McIntosh, 2020). In other words, “accessibility is related to the absence of obstacles to the use of the tourism product” (Özogul & Baran, 2016, p. 82) in infrastructure, public transport, information services, technology, and communication (Rosa et al., 2020).

According to Nostrand et al. (2013), one of the main decision-making factors for tourists when selecting destinations is accessibility. From this perspective, it can be concluded that poor accessibility causes a low inflow of tourists, which is considered one of the main factors affecting tourists’ preference for tourism destinations (Zhang & Jiang, 2021). Accessibility can be considered as the opportunity to safely and autonomously access equipment, transportation, spaces, and information (Lamas & Júnior, 2021).

Santana-Santana et al. (2020, p. 10) present some strategies to improve the physical accessibility of tourist destinations, such as: “adequate sidewalk height; design of accessible alternatives to existing stairs; appropriate adaptation of reserved parking lots, with special attention to connectivity with the pedestrian path and relocation of bus stops at a shorter distance”. These strategies do not require major works, i.e. they could be carried out on a small budget (Santana-Santana et al., 2020).

With any type of disability, in everyday life, including leisure, people with disabilities have their needs and limitations. Therefore, it is necessary to analyze and consider the specific barriers and limitations that have occurred to people with disabilities, in addition to the more common barriers (Figueiredo et al., 2012), particularly when creating and/or promoting accessible activities (Burns et al., 2009; Figueiredo et al., 2012).

Previously, studies were developed around the factors that should be considered in the development and construction of 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 (Mastrogiuseppe et al., 2021).

The specific objective of this research is to identify the accessibility measures adopted in the cities of Braga and Guimarães, in the Northern Region of Portugal, through questions associated with the specialized training of human resources in the tourism sector, the use of new technologies as a competitive advantage, the concern with the presentation of information in different formats and the appropriate modes of transport for tourists to travel between destinations and within their territory, based on ISO STANDARD 21902: 2021 (2021) and the studies by Austin et al. (2018), Barron and Gauntlett (2002), Burnett and Baker (2001), Cloquet et al. (2018), Darcy et al. (2010), Eusébio et al. (2020), Halkiopoulou et al. (2020), Hayhoe (2018), Gillovic and McIntosh (2020), Lee (2020), Liasidou et al. (2019), Mastrogiuseppe et al. (2021), Ponciano et al. (2021), Sandell et al. (2010), and Santana-Santana et al. (2020). To collect and analyze the information, the qualitative method was selected, a descriptive exploratory study based on semi-structured interviews conducted with officials, stakeholders, interpreter guides, and associations from each tourism destination (Braga and Guimarães).

The remainder of this paper is organized as follows: the literature review on the theme of accessibility, accessibility requirements and the relevance of this theme integrated into cultural heritage, considering different approaches in its framework, the methodology used, the results obtained and their discussion.

2 Literature Review

Accessibility can be considered a territorial and heritage development strategy for a destination to be competitive and sustainable. In this way, accessibility conditions should be considered in the sustainability criteria in order to improve the principles of sustainability, as these two concepts are much discussed in tourism (Lamas & Júnior, 2021).

Cultural heritage is an essential factor for modern society, as it is considered a symbol of the past and a way of safeguarding local identity, and can make an important contribution to the local economy (Silva & Henriques, 2021).

The Convention on the Rights of Persons with Disabilities announced that participation in society is a human right, and there is a need to enforce accessibility in

cultural spaces. Heritage sites, museums, and galleries have a strong interest in implementing accessibility strategies with the aim of enabling the participation of all people. Enforcing accessibility in cultural heritage will reduce barriers and obstacles (Mastrogiuseppe et al., 2021).

In addition to people with disabilities, the over-65 population (which is a growing tourism market, as it travels more frequently and has higher expenses) also needs accessibility; as accessibility factors, in addition to declining health, influence the choices of tourist destinations by the senior population (Mary et al., 2020). One of the main difficulties associated with age is reduced mobility. Reduced mobility has become one of the main issues to be addressed, since laws and places must provide inclusion (access to public transport, for example), enabling people with disabilities and the elderly to integrate into social life (Pinto et al., 2020).

Accessibility requirements have to be integrated into the sustainability criteria, with the aim of improving and increasing the scope of the term sustainability, since it must consider social responsibility, inclusion, and human rights (Lamas & Júnior, 2021). According to Ritchie and Crouch (2010), accessibility is a factor that helps tourism destinations to be more sustainable and have a competitive advantage. “Working on accessibility as a variable in a strategic model and as a performance indicator for sustainable management is a basic premise for democratic participation” (Lamas & Júnior, 2021, p. 370).

Regarding people with disabilities, Darcy et al. (2010) highlight that accessible tourism is an integral part of the social, economic, and environmental conditions for sustainable tourism. Developing products for people with disabilities requires the collaboration of all those involved in the tourism industry and the integration of people with disabilities, always based on the values of the tourism destination. According to the *Triple Bottom Line* (TBL), the development of sustainable products for accessible tourism depends on the principles of sustainable tourism (Nigg & Eichelberger, 2021). For Sica et al. (2021), accessibility is considered an important factor for sustainable tourism, as it provides employment opportunities for the tourism industry. According to Eckert and Pechlaner (2019), the wide variety of tourism products is important for the sustainable development of the tourism industry. Tourism products can contribute to overcoming the barriers and challenges faced at the destination, such as addressing environmental issues, in line with the concept of sustainable tourism (Nigg & Eichelberger, 2021). According to Haid and Albrecht (2021, p. 3), “products for sustainable tourism can be developed by adjusting distribution channels and supply chains with the introduction of a sustainability requirement”.

Universal Design identifies more with environmental characteristics. When applied to tourism, it contributes to a wide variety of socially sustainable outcomes (Darcy et al., 2010). According to Barron and Gauntlett (2002, p. 80), social sustainability happens “when formal and informal processes, systems, structures and relationships actively support the ability of current and future generations to create healthy, livable communities”. Socially sustainable populations are characterized as a just, democratic, and diverse community that always tries to provide a good quality of life (Darcy et al., 2010). As mentioned earlier, the tourism industry has a high

potential for social sustainability, as tourism services are able to provide a good quality of life for tourists (Darcy et al., 2010).

Considering tourism destination governance, long-term sustainability and destination management are critical factors for business success, since they are not seen in a consensual way by most tourism operators (Darcy et al., 2010). According to Kotter (1998), most tourism companies transform their products and services in order to achieve revenue-related objectives (total quality management, organizational change, and restructuring). However, Elkington (1997) cit in Darcy et al. (2010) emphasized the need for tourism businesses to grow in the long term by meeting all the needs (goods and services) of the population.

Today, cultural heritage plays a central role in society (Bitušíková, 2021). Over time, the concept of cultural heritage has acquired a variety of meanings, being considered as an icon of the past of tourism destinations and as a way of preserving their identity in a changing world (Bitušíková, 2021; Silva & Henriques, 2021). Cultural heritage represents two aspects: identity, traditions, and practices, and their evolution throughout history; and a more modern aspect, since it animates the economy with tourist activity (Silva & Henriques, 2021). According to UNESCO World Heritage (2019, p. 145), "Heritage is our legacy from the past, what we live with today, and what we pass on to future generations". Cultural heritage, art galleries, and museums are highly interested in using accessibility strategies to improve participation for all.

Providing accessible environments for people with disabilities reduces the barriers and obstacles that may exist (Mastrogiuseppe et al., 2021). Several authors (Austin et al., 2018; Hayhoe, 2018; Mastrogiuseppe et al., 2021; Sandell et al., 2010) state that increased interactions between diversified institutions and academics with an interest in disability issues are creating new reflections on how accessibility should be provided.

Accessible environments should be created with the support of people with disabilities, since they improve the relationship between individual processes/experiences and the characteristics of the place, and there is always a clear vision of how to develop the resources that help to include them (Mastrogiuseppe et al., 2021). Opportunities are created through the relationship between individual processes and the place (environment) that is used by the person (Mastrogiuseppe et al., 2021).

According to Bortolotti and Mastrogiuseppe (2019), it is essential to include people with disabilities in order to better understand their needs and the various responses that exist. However, people with disabilities and the aging population need accessible routes to have better access to cultural heritage, thus contributing to better social inclusion. The development of an accessible environment should be the basis of urban quality, as it will facilitate the journey not only for people with needs but also for the entire population (residents and tourists) (Rosa et al., 2020).

3 Methodology

This study is an exploratory descriptive study using a qualitative methodology. It analyzes the accessibility of historical and cultural heritage in medium-sized cities, specifically Braga and Guimarães.

“Qualitative research is a well-established approach to investigating phenomena in the social sciences” (Dwyer et al., 2012, p. 150). Since the first decades of the twenty-first century, qualitative methodology has gained more acceptance, as this method can provide rich and in-depth knowledge with many points of view (Dwyer et al., 2012; Leavy, 2014).

The city of Braga, the largest city in the Minho region, is considered the oldest city in Portugal and one of the oldest Christian cities in the world. It is located in the northern region of Portugal (Almeida & Pinto, 2017). It has also been considered one of the youngest and most entrepreneurial cities in Portugal. It was named European Youth Capital in 2012 and Ibero-American Youth Capital in 2016 (Bessa, 2019).

Braga was nicknamed the “Portuguese Rome” or the “City of the Archbishops”, having been considered the seat of the bishopric, and its population was very religious (Almeida & Pinto, 2017; Couto, 2019). The oldest cathedral in the country is in this city and was built in the twelfth century by D. Henrique and D. Teresa, parents of D. Afonso Henriques, and their tombs are located there. Afonso IV, King of León, donated this territory to his daughter Teresa when she married Count Henry of Burgundy (Câmara Municipal de Braga, n.d.; Visit Portugal, 2013b). As the oldest city in Portugal, Braga has a considerable heritage in its territory, due to the occupations it has undergone over the years (Couto, 2019). Ribeiro (2008) emphasizes that Braga is a privileged place since it brings together several memories and experiences of past events.

The architecture of the city of Braga is marked by the Baroque style, present in the existing churches and palaces (Couto, 2019).

With regard to the city’s heritage, Braga City Council has developed a number of strategic actions to help make it more attractive: the creation of a contemporary art museum, with the aim of promoting the art and culture of the destination; the promotion of street activities, such as street theater, art, and heritage exhibitions; the creation of an information center in the historic center, with the aim of making culture more accessible and visible; and a database of all cultural agents, with the aim of promoting the city’s existing cultural offer (Braga City Council, n.d.-b).

In 2021, Braga was considered by the *European Best Destination* as one of the best destinations to visit (European Best Destinations, 2021).

The city of Guimarães is associated with the formation of Portugal and is considered the “Cradle City”, since the first king of Portugal, Afonso Henriques, was born there around 1109 (Alves, 2011; Visit Portugal, 2013a; Wielewiczki, 2011). Guimarães is a medium-sized city located in the north of Portugal (Remoaldo et al., 2017). It is a tourism destination with a wealth of culture and heritage, with traditional infrastructures dating from the fifteenth to the nineteenth centuries (Remoaldo et al., 2017; Vasconcelos et al., 2018; Wielewiczki, 2011).

The Historic Center of Guimarães was developed around two points: the Monastery and the Castle (founded in the tenth century and with a typically medieval style). The preservation and protection of traditional buildings, protecting their authenticity and integrity, has contributed to this city being characterized as one of the main references concerning the conservation of cultural heritage, having been classified, on December 13, 2001, as a World Cultural Heritage Site by the *United Nations Educational, Scientific and Cultural Organization* (UNESCO), at the 25th Session of the World Heritage Committee (Vasconcelos et al., 2018; Visit Portugal, 2013a). This award was the result of a process of urban redevelopment that began in the last decades of the twentieth century, since, in today's world, tourism destinations are increasingly competitive with each other, with the need to constantly innovate and acquire new advantages over their competitors (Vasconcelos et al., 2018). According to Pereira et al. (2001) cit in Vasconcelos et al. (2018), the heritage classified as World Heritage not only brings several advantages, such as the promotion and preservation of the property and an increase in tourism, but also an increase in responsibility and management capacity. In fact, this distinction has had an impact on the tourist practices of the city of Guimarães, causing an increase in notoriety at national and international level. In this way, this distinction was a key factor for the city, since, due to its cultural heritage, it fostered its affirmation as a tourist destination (Vasconcelos et al., 2018).

In 2012, Guimarães became the European Capital of Culture, the first medium-sized city to achieve this recognition (Remoaldo et al., 2017). This event is contested by the various cities competing, and Guimarães was selected due to the growth and increase in notoriety and competitiveness among tourist destinations of the same typology (Vasconcelos et al., 2018). By receiving these two distinctions (UNESCO World Heritage Site and European Capital of Culture), Guimarães has promoted its external notoriety and has managed to shape the city's image (Remoaldo et al., 2017). Throughout the twenty-first century, the city began to make a diversified bet: a strong cultural agenda, with an incentive for artistic production and cultural consumption; it developed new cultural equipment and infrastructures; it streamlined urban requalification; it invested in a new brand image; and it increased its accommodation offer, which led to an increasing tourism demand. All these changes enabled tourists and the local population the chance to have unique and authentic experiences (Alves, 2011; Vasconcelos et al., 2018).

These initiatives result in greater international notoriety, but they also entail additional responsibility in terms of concern for the levels of accessibility of urban space and cultural heritage.

The qualitative method is the best method for analyzing more sensitive topics, as it gives participants some privacy and the chance to express themselves in a more relaxed environment (Adeloye et al., 2020; Elam & Fenton, 2003). Choosing the qualitative method for sensitive topics requires researchers to prepare and plan the interviews in advance so that data collection is easier, and the safety and well-being of all participants is essential.

The aim of this study is to analyze the accessibility of historical and cultural heritage in medium-sized cities, specifically the cities of Braga and Guimarães. As

Table 1 General objective and specific objectives

General objective	Evaluating accessibility to historical and cultural heritage in medium-sized cities
Specific objective	Identify the accessibility measures adopted in the cities of Braga and Guimarães

Source Authors

such, the literature review addresses and demonstrates the analysis of accessibility in the cultural heritage of both cities, with relevance to the heritage tourism offer, with an emphasis on tourist demand. Based on ISO STANDARD 21902: 2021 (2021) and the studies by Austin et al. (2018), Barron and Gauntlett (2002), Burnett and Baker (2001), Cloquet et al. (2018), Darcy et al. (2010), Eusébio et al. (2020), Halkiopoulos et al. (2020), Hayhoe (2018), Gillovic and McIntosh (2020), Lee (2020), Liasidou et al. (2019), Mastrogioseppe et al. (2021), Ponciano et al. (2021), Rodrigues et al. (2023), Sandell et al. (2010), and Santana-Santana et al. (2020) the research objectives were defined and the interview script to be applied in the study was drawn up (Tables 1 and 2).

This script was sent electronically directly to the target audience, with the aim of getting the participation of the various parties able to take part in the interview. The participants were explained the aim of this study and its purpose and asked to schedule the interviews. These took place during the months of July, August, and September and were conducted in person, in writing or by video call. This research considers theoretical saturation, i.e. at a certain point during the interviews, there will be no more information to add on the subject, and they will be terminated (Table 3).

After conducting the interviews, the next stage consists of analyzing and interpreting the data collected. In the first phase, the synthesis of information, i.e. where the elements collected during the interviews are selected through notes and transcripts (Hashimov, 2015). Since the data was collected through interviews, they were transcribed to identify the content that was important for the research.

This research sample consists of 13 participants and respects the confidentiality and anonymity of the interviewees. They are, therefore, identified by the name “I” (Interviewee) and numerically (1 to 13) (Table 4).

With the aim of defining and identifying accessibility measures adopted in the cities of Braga and Guimarães, the questions relate to the specific training of employees, the use of new technologies as a competitive advantage, the concern to present information in various formats and the appropriate means of transportation.

4 Results

The final objective of the data analysis is to identify the accessibility measures adopted in the cities of Braga and Guimarães. The analysis of the collected data will be carried out through content analysis.

Table 2 Theoretical foundation of the interview script

Objective 2: Identify the accessibility measures adopted in the cities of Braga and Guimarães	
Interview questions	Theoretical foundation
Q1: What measures can be adopted for people with reduced mobility, so that they can enjoy the destination with fewer limitations?	Burnett and Baker (2001) and Santana-Santana et al. (2020)
Q2: Do employees have the specific training and skills needed to provide a better service to this tourist segment? If they don't, what measures do you consider important for them to acquire them?	Cloquet et al. (2018) and Liasidou et al. (2019)
Q3: Nowadays, new technologies represent a competitive advantage for companies and destinations Do official websites have adequate information for people with reduced mobility? If not, what suggestions do you have for improvement?	Ponciano et al. (2021), Halkiopoulou et al. (2020), Eusébio et al. (2020), Lee (2020)
Q4: Regarding Cultural Tourism, is the information provided in monuments and cultural infrastructures (museums, for example) presented in different formats (recordings, easy reading or <i>Braille</i>)?	ISO 21902: 2021, 2021
Q5: In the city of Braga/Guimarães, are there transportation modes adapted to any type of person, regardless of their abilities, allowing them to move more easily between the historic center/cultural heritage? If not, what would you consider important to improve?	ISO 21902: 2021, 2021

Source Authors

Table 3 Interviews conducted

Entity interviewed	Date	Duration
Braga Cathedral Treasury-Museum	06.7.2022	In writing
Braga City Council	08.7.2022	In writing
D. Diogo Sousa Archeology Museum	11.7.2022	00:20:06
Biscaínhos Museum	14.7.2022	00:22:15
Palace of the Dukes of Bragança	18.7.2022	00:18:30
Guimarães Castle	18.7.2022	00:27:08
Alberto Sampaio Museum	20.7.2022	00:33:37
Northern Regional Directorate of Culture	02.8.2022	00:35:46
Certified Interpretive Guide	29.8.2022	00:45:03
Monastery of São Martinho de Tibães	31.8.2022	In writing
Certified Interpretive Guide	05.09.2022	00:22:55
Certified Interpretive Guide	17.09.2022	00:23:03
CERCI Braga	21.09.2022	00:20:56

Source Authors

Table 4 Participants' sociodemographic data

No.	Interviewee's role in the organization	Age	Gender	Academic qualifications
I.1	Senior Technician	52	Female	Degree
I.2	Head of Division	64	Female	Master's Degree
I.3	Museum Manager	64	Female	Degree
I.4	Museum Manager	64	Female	Degree
I.5	Director	64	Female	Doctorate
I.6	Museum Manager	59	Female	Master's Degree
I.7	Director	64	Female	Doctorate
I.8	Director	58	Female	Doctorate
I.9	Certified Interpretive Guide	43	Female	Degree
I.10	Head of the Tibães Monastery Education Service	47	Male	Master's Degree
I.11	Certified Interpretive Guide	45	Female	Degree
I.12	Certified Interpretive Guide	56	Male	Degree
I.13	Technical Director	42	Female	Degree

Source Authors

4.1 Accessibility Measures Adopted in the Cities of Braga and Guimarães

About identifying the accessibility measures adopted in the cities of Braga and Guimarães, there will be an analysis of the measures adopted, the specialized training of employees, new technologies, cultural tourism, and adapted transportation modes.

4.1.1 Braga

- a. Measures to be/were adopted so that people with reduced mobility can enjoy the destination with fewer limitations

Despite the improvements and adaptations made in the city of Braga in terms of accessibility in recent years, the participants pointed out some measures that could be adopted in order to improve tourist services, used by people with reduced mobility: *signposting of crosswalks and crossing areas; circulation areas for people with reduced mobility; elimination of architectural barriers; more parking spaces near museums/monuments; lowering of sidewalks; access ramps; adapted bathrooms; continuous training and personalized customer service; the construction of access platforms, at the same level as the train, in train stations, also reducing the distance between the train and the platform; the creation of buses with their own wheelchair*

space; and, on river beaches, the existence of chairs to access the water (I.1/I.2/I.3/I.4/I.9/I.10), which should be done with the help of associations (I.9).

To make real improvements to enable this population to enjoy cultural heritage and tourism, we need to look at the *routes and itineraries of the visit, analyze the importance attached to each of these sites, see how many and what kind of people go and identify their needs (I.12).*

b. Specific training and skills needed by employees

About ongoing training, employees are an essential part of the accessible service. During the interviews on this topic, there was some disagreement between the various participants, as some of the interviewees said that although there is commitment on the part of the employees, there is not much training. However, other participants claimed that there is training in accessible tourism in the tourist destination of Braga, offered by the municipality, with the *aim of improving service and creating specific materials (I.2).*

In the case of the Monastery of São Martinho de Tibães, *all the employees who provide reception and customer service services have basic training (I.10) in this area.*

The mentality towards cultural heritage and these adapted buildings is quite conservative and there are a number of requirements, safety and accessibility that buildings and spaces (archaeological sites) have to meet. (I.8)

With regard to culture, the adoption of measures (partnerships/projects), which even if they are not fundamental, mitigate existing problems and improve physical accessibility. (I.3)

I think more investment would be needed in terms of training, but also in hiring specific human resources to meet the growing specific needs of each visitor. (I.10)

c. New technologies as a competitive advantage

Nowadays, *websites are a competitive advantage for companies and tourist destinations.* According to the information provided by the various participants, the official *websites of the tourist destination Braga still don't correspond to all audiences (I.4), although there is a certain concern with improving and building the websites (I.7).* Braga was the first tourist destination to draw up *itineraries for blind people (I.2).* About reduced mobility, Braga has *virtual tours on its websites (visitbraga.travel and cm-braga.pt) and in the "smart guide" app (I.2).* The *websites contain useful information about the monuments and museums (I.3).* Some museums/monuments already have their own *accessibility tab on their websites (I.10), an example of which is the website of the Monastery of São Martinho de Tibães.* One suggestion put forward by the participants to improve the service on the *websites is the following: complement information in different languages and formats (written and recordings) on the technical and human resources (I.1).*

Websites are used a lot, but they shouldn't replace a real visit, they help with information, but they don't replace a visit. (I.8)

d. The information provided on monuments and cultural infrastructures

As far as cultural tourism is concerned, there is still a long way to go. As far as the information provided by monuments and museums is concerned, many of them *don't have all the information presented in different formats* (I.1), they only have some small “braille” scripts and some *tactile experiences* (I.3), however these visits have to be scheduled in advance, since *many of the city's monuments and museums don't have full-time specialized staff* (I.3). In the case of the Monastery of São Martinho de Tibães, it *has information available in various formats: paper, audio, QR Code and a translation of the general information into “braille”* (I.10), giving everyone the chance to obtain the information provided by the monastery.

e. Adapted public transport

Finally, about public transport, many of the participants said that *most of the buses in the city center have access platforms* (I.2), which are adapted for people with special needs to help them get around. As far as information about stops is concerned, it is *displayed on a screen, but not audibly* (I.10), making it difficult for blind people to find information. In addition to the means of transport, there are *pedestrian circuits around the historic center* (I.4). As far as Braga's interpreter guides are concerned, they use private transport adapted to the service they provide, rather than public transport, because the *client looks for the service that provides them the best experience* (I.9).

4.1.2 Guimarães

- a. Measures to be/were adopted so that people with reduced mobility can enjoy the destination with fewer limitations.

Like any other segment, people with reduced mobility have the right to enjoy tourism in a dignified and independent manner. Therefore, during the interviews, the participants indicated some measures to improve the service provided to people with reduced mobility: *coordination between the various entities (public and private); adapted public toilets; more suitable means of transport; transport stops with more accessible conditions; access ramps; adequate signage; elevators; creation or adaptation of specific corridors; lowered sidewalks; and, parking areas close to the places to visit* (I.5/I.6/I.7/I.8/I.9/I.11/I.12).

- b. Specific training and skills needed by employees

One of the main shortcomings of tourist destinations is the lack of employees with specific training and the necessary skills. Regarding the tourist destination Guimarães, and according to the information provided by the interviewees, there are organizations (such as the Paço dos Duques de Bragança and the Northern Regional Directorate of Culture) that provide training in this field to employees in order to provide a better service to all visitors. This training was in terms of *receiving, welcoming and guiding visitors* (I.5/I.8). However, there is still a big gap in human resources training, especially when it comes to heritage. One of the main reasons for this is the *lack of financial support from the government* (I.12). To combat this gap,

some measures put forward were *raising people's awareness; looking for training in the area; and organizations and the city council organizing training and providing it to their employees* (I.8/I.11).

It's very difficult to recruit people with specific skills (technical assistants) for museums/monuments. (I.8)

c. New technologies as a competitive advantage

As mentioned earlier, destinations and tourist companies with an accessible *website*, containing all the necessary information and made explicit in various formats, have a competitive advantage over their competitors, as it allows people with disabilities to research the place before booking a trip/visit, trying to get as much information as possible. As such, and according to the data provided by the participants, *there is a certain amount of care in this field, with some concern for the improvement and construction of websites* (I.8). The official *websites always try to have all the information available in various formats* (I.7). Regarding reduced mobility, *there are museums that make reference to accessibility on their websites* (I.11).

d. The information provided on monuments and cultural infrastructures

Some of the monuments and museums in the city of Guimarães have developed projects with the aim of providing information to their visitors in a more accessible way. In the Paço dos Duques de Bragança, a *QR Code* has been developed *that contains information in 4 languages and formats (translation and audio recording)* (I.5). In other monuments, *the easy-to-read format is used. Braille is still rarely used* (I.7/I.8/I.9).

e. Adapted public transport

Public transport is still not accessible to everyone, despite the efforts already made. Investment has been made in public transport, linking the different parishes to the city of Guimarães, but it still suffers from some shortcomings in terms of timetables and stops, since *they are far from the places and the timetables are precarious* (I.6), meaning that for people with disabilities this becomes an obstacle to their use. Therefore, one suggestion made was to *increase the timetables on public transport and improve the places where passengers get on and off the bus* (I.6). It should be noted that there are some buses with access ramps, but not all of them are adapted, as the *cost of making them accessible is very high and there is no financial support from institutional organizations* (I.12).

Table 5 gives an overview of the accessibility measures adopted in the cities of Braga and Guimarães.

Table 5 Summary of accessibility measures adopted in the cities of Braga and Guimarães

	Braga	Guimarães
Measures to be/were adopted so that people with reduced mobility can enjoy the destination with fewer limitations	<p>Signs for crosswalks and crossing zones</p> <p>Circulation zones for people with reduced mobility</p> <p>Elimination of architectural barriers</p> <p>More parking spaces near museums/monuments</p> <p>Lowering sidewalks</p> <p>Access ramps</p> <p>Adapted bathrooms</p> <p>Continuous training and personalized customer service</p> <p>Construction of access platforms at the same level as the train in train stations and stations</p> <p>Reducing the distance between the train and the platform</p> <p>Creation of buses with their own wheelchair space</p> <p>On river beaches, the existence of chairs to access the water (I.1/I.2/I.3/I.4/I.9/I.10)</p>	<p>Articulation between the various entities (public and private);</p> <p>Adapted public toilets</p> <p>Most suitable means of transport</p> <p>Transport stops with more affordable conditions</p> <p>Access ramps</p> <p>Adequate signage; elevators</p> <p>Creation or adaptation of specific corridors</p> <p>Lowered sidewalks</p> <p>Parking areas close to the sites to be visited (I.5/I.6/I.7/I.8/I.9/I.11/I.12)</p>
Specific training and skills needed by employees	<p>Employees take courses (on a voluntary basis) that other organizations promote (I.3)</p> <p>The Municipality of Braga has allowed and facilitated access to training in accessible tourism for various services, with a view to improving service and creating specific materials (I.2)</p> <p>In the case of the Tibães Monastery, all the staff who welcome and serve the public have basic training in this area (I.10)</p> <p>Many of the city's monuments and museums don't have full-time specialized staff (I.3)</p>	<p>There is a gap in the training of human resources, so there should be ongoing training (such as Portuguese sign language training) (I.9)</p> <p>The training was in reception, welcoming and guiding visitors (I.5/I.8)</p> <p>Lack of financial support from the government (I.12)</p>

(continued)

Table 5 (continued)

	Braga	Guimarães
New technologies as a competitive advantage	<p>The official websites of the tourist destination Braga still don't cater for all audiences (I.4)</p> <p>Embossed scripts for the blind (I.2)</p> <p>There is a certain concern with improving and building websites (I.7)</p> <p>They already have their own tab dealing with accessibility (I.10)</p>	<p>There is a certain amount of care in this field, with some concern for the improvement and construction of websites (I.8)</p> <p>Official websites always try to have all the information available in various formats (I.7)</p> <p>Regarding reduced mobility, there are museums that refer to accessibility on their websites (I.11)</p>
The information provided on monuments and cultural infrastructures	<p>Many of the museums/monuments don't have all the information presented in different formats (I.1)</p> <p>They only have a few small braille scripts and some tactile experiences (I.3)</p> <p>In the case of the Monastery of São Martinho de Tibães, the information is available in various formats: paper, audio, QR Code and a translation of the general information into "braille" (I.10)</p>	<p>At the Paço dos Duques de Bragança, a QR Code was developed that contains information in 4 languages and formats (translation and audio recording) (I.5)</p> <p>Other monuments use the easy-to-read format. Braille is still rarely used (I.7/I.8/I.9)</p>
Adapted public transport	<p>Most of the buses in the city center have access platforms (I.2)</p> <p>Customers look for the service that gives them the best experience (I.9)</p>	<p>Although there has been an improvement in transportation, it is still "far from" accessible to everyone (I.5)</p> <p>Accessibility from the parishes to the city has improved significantly, but there is still a long way to go, especially when it comes to transport stops and timetables (I.6)</p>

Source Authors

5 Conclusions

When applied to tourism, Universal Design should contribute to a wide range of socially sustainable outcomes (Darcy et al., 2010), and social sustainability should be achieved when procedures, systems, structures, and formal and informal relationships ensure that current and future generations are actively supported in creating healthy

and sustainable communities, with guaranteed safety and satisfactory levels of quality of life.

Accessibility can be considered an opportunity (an important and strategic factor) for tourist destinations, which is why they agree with Bifulco and Leone (2014), Santana-Santana et al. (2020) 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 Rosa et al. (2020), improvements are needed in some aspects, such as the creation of passenger drop-off and pick-up points and lowered crosswalks, and the measures and strategies presented in ISO Standard 21902: 2021 (2021) need to be applied.

The specific objective of this research is to identify the accessibility measures adopted in the cities of Braga and Guimarães, in the Northern Region of Portugal, through questions associated with the specialized training of human resources in the tourism sector, the use of new technologies as a competitive advantage, the concern with the presentation of information in different formats, and the appropriate modes of transport for tourists to travel between destinations and within their territory.

Although there have been improvements in accessibility in both cities, people with reduced mobility still face some obstacles. The measures most often indicated by participants were the use of access ramps (permanent or removable) and the creation of adapted public toilets. However, these improvements should be carried out with the support of associations, as justified by Biddulph and Scheyvens (2018). It is also necessary to create accessible routes to monuments/museums (Rosa et al., 2020).

On the topic of the specialized training and skills needed by employees, the opinion of the participants fits in with the criticism presented by Loredana et al. (2021) with an emphasis on the lack of specialized employees with the necessary skills in this area. With regard to new technologies in the two cities, it is possible to conclude that there is a concern for the development and improvement of official *websites* by destinations, introducing information in various formats, allowing the empirical study to be framed in the perspective of Burnett and Baker (2001) and Silverstein and Parker (2002), since marketing strategies must be designed and implemented with the various target audiences in mind.

Regarding Cultural Tourism, it can be concluded that in the two cities under analysis, not all museums and monuments have information presented in different formats and languages. Despite the ISO 21902: 2021 (2021) standard, with defined measures and strategies, many destinations have yet to implement accessibility in all their services and activities.

As far as adapted public transport is concerned, it can be concluded that both tourist destinations take this aspect into account, and there have been some improvements, in accordance with ISO Standard 21902: 2021 (2021). However, there is a noticeable lack of financial support, with shortcomings identified by the interviewees, which fall within the scope of Zhang and Jiang's research (2021).

In future studies, it would be important to assess the demand from tourists with reduced mobility who visit the historical and cultural heritage of medium-sized cities. Organizations should consider this data to better evaluate the issues under analysis.

In addition, it would also be interesting to apply this study to other types of disability (sight, hearing, or cognitive problems) and try to identify the limitations and barriers they encounter when enjoying tourism and historical and cultural heritage.

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Gender Gap in Tourism SME Innovation Practices



Susanne Marx and Michael Klotz

Abstract The innovation gender gap proclaims a female underrepresentation in innovation, mostly measured by patent filing focusing on knowledge-intensive industries. That approach neglects service industries with stronger female entrepreneurship, such as tourism. Gender and the type of industry are suggested to influence how innovation is defined and designed. Research on gender differences in approaches to innovation in the tourism sector from an individual actor view is rare. Therefore, this study explores how gender differences are expressed in the innovation approach in tourism small and medium-sized enterprises (SMEs). Paired samples of male and female managers in three SMEs are interviewed. The qualitative content analysis focuses on defining the term innovation, measuring innovation success, and the approach to design innovation activities. The comparison contrasts the findings both based on the biological gender as well as on the feminine and masculine discourse. The study suggests five propositions recommended for future quantitative research.

Keywords Gender · Innovation · Tourism · Small and medium-sized enterprises

JEL Classification O36 · L83 · Z30

1 Introduction

Gender equality and empowerment of females are amongst the United Nations' Sustainable Development Goals, yet, regarded as “the unfinished business of our time,” as UN Secretary-General António Guterres put it (United Nations, 2023). One such aspect is the gender gap in entrepreneurship and innovation, with women underrepresented in both (Biscione et al., 2022; Carrasco, 2014; European Commission, 2021; Sternberg et al., 2022; Wynarczyk & Ranga, 2017). However, gender differences might not only result from inequality in rights but also from how the

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gender gap is measured, i.e., how innovation is perceived, and even more, which cultural aspects beyond biological gender might influence the perception leading to a gender gap. Since gender-related research focuses on technology- and knowledge-based industries, the resulting gap might be challenged in other service sectors (Martins et al., 2016) or by analysing feminine and masculine attributes (Wikhamn & Knights, 2013) instead of biological gender. A service sector with a large part of female entrepreneurs with limited gender-focused innovation research so far is the tourism industry. This study, therefore, investigates: How are gender differences expressed in the approach of innovation in tourism SMEs? After introducing the existing theory, the multiple case study design is outlined, followed by presenting results and developed propositions.

2 Literature Review

2.1 Innovation Gender Gap

In entrepreneurship research, the aspect of gender has received considerable attention, yet focusing on gender aspects in innovation and its practices is associated with research potential (Biscione et al., 2022; Foss & Henry, 2016). The difference between the number of men and women starting a business is referred to as a gender gap, with women clearly and continuously underrepresented—being an entrepreneur is considered masculine (Lindberg et al., 2014). Especially in countries with higher income levels, the total early-stage entrepreneurial activity is continuously higher for men (Sternberg et al., 2022). Traditional role models (Alsos et al., 2016) and little visibility of successful female entrepreneurs nourish the impression of women having “little impact and restricted contribution on overall innovation capacity” (Wynarczyk & Ranga, 2017, p. 8). A possible reason for that impression might result from women driving innovation later in the company’s development when more resources are available, especially 30 years and more after founding the firm (Audretsch et al., 2020). Thus, a research focus on start-ups and the early stages of entrepreneurship might impact the validity of findings for innovation in a broader sense. Still, Hozer-Kocmiel et al. (2017, p. 110) state: “women are disregarded as innovators,” or other authors speak of an innovation gender gap (Biscione et al., 2022; Carrasco, 2014) or gender divide (Wynarczyk & Ranga, 2017), with the difference considered being severe (European Commission, 2021). There are several possible explanations for that gap.

Research to date has tended to be biased towards technical innovation, which is predominantly male-dominated (Foss & Henry, 2016). Patents and, thus, inventions are used as innovation indicators, and women are regularly underrepresented here (Bijedić et al., 2016; Poutanen & Kovalainen, 2017). For example, the She Figures report by the European Commission (2021) focuses on patents, academic-corporate collaboration, and knowledge-intensive industries, yet, still points to the fact that social

innovations in other sectors with more female presence are neglected. Thus, investigating gender aspects in innovation seems to focus on radical innovation, although so-called routine innovations based on an existing technological know-how and business model often make the highest contribution to profit (Pisano, 2015). Especially service-oriented industries, where women start-ups are more frequent than average (Bijedić et al., 2016; European Commission, 2021), are excluded from these patent- and technology-focused studies.

Similarly, a particular challenge seems to lie in understanding the term innovation (Foss & Henry, 2016), which might differ by gender (Bijedić et al., 2016; Poutanen & Kovalainen, 2017). Poutanen and Kovalainen (2017, p. 34) stress to “look beyond the traditional understanding of innovation as a set of technological and patentable activities, widening the field of innovation to include social innovations and collaborative work in innovation development.” The perception of what to regard as an innovation has become broader since the early definitions of Schumpeter (1935), ranging from radical, world-first innovations to those new to the individual firm (Gausemeier et al., 2019). The Oslo Manual also includes improved, not only new products or processes in its definition of innovation (OECD/Eurostat, 2018), adopting the firm’s view.

The industry also influences the view on innovation. The share of female entrepreneurs is significantly higher in industries with physical human contact, such as health services (European Commission, 2021). Martins et al. (2016), researching nursing entrepreneurs, found that the perception of innovation and entrepreneurship changes when considered in general or directly applied to the nursing business. Whilst generally associated with profit, in the nursing business, the focus is on patient satisfaction. The interviews with female and male entrepreneurs showed a feminine approach to innovation, e.g., the focus on care over business (Martins et al., 2016). Another sector with more than average women entrepreneurship is the tourism sector.

2.2 Innovation in the Tourism Sector

In the accommodation and food services sector, 40.2% of self-employed persons with and without employees were female in the 2022 European average compared to 33.5% across all NACE industries (European Institute for Gender Equality, 2023), or only one quarter in science, engineering, and information technology (European Commission, 2021). Small and medium-sized enterprises (SMEs) constitute the tourism sector (Zenker & Kock, 2020), often in family ownership (Beritelli et al., 2016).

The innovativeness of the sector ranges from high (Montañés-Del-Río & Medina-Garrido, 2020) or even “amongst the most innovative in the world” (Ratten & Braga, 2019, p. 117) to the lowest level, e.g., regarding digital innovation in the German digitalisation index (Büchel & Engels, 2023). In the German innovation survey 2021 (Schubert & Rammer, 2023), 50.2% of travel agencies and tour operators were considered innovators, almost the same as the average of the German industry (54.3%). However, in a study in Norway, tourism professionals showed difficulties

in understanding the questions in the Community Innovation Survey of the European Union (Nordli, 2017), and smaller-level innovations are not reported due to a lack of structured processes in touristic firms. Identifying what is understood by innovation seems essential in this industry.

Some studies for the tourism sector question the innovation gender gap identified in technology-oriented industries. Montañés-Del-Río and Medina-Garrido (2020) draw on data from the Global Entrepreneurship Monitor 2014 and conclude that there is a positive relationship between the female gender of the entrepreneur and innovation in the tourism industry. Innovation is a central characteristic of female businesses in rural tourism (Martini et al., 2020). Thus, gender aspects of innovation in tourism might differ from other industries.

The approach to design innovation activities is supposed to differ as well. In a study on innovation activities of small tour operators, Marx and Klotz (2023) found that female owners drive innovation even in times of crisis and involve diverse actors, including informal, private contacts, in innovation activities. Open Innovation activities across organisational boundaries (Chesbrough, 2003) are a common approach in the tourism sector due to the networked nature of the tourism product (Marx & Arens, 2023; Marx & Klotz, 2023). Women seem more likely to draw on external knowledge (Biscione et al., 2022) and stakeholder networks (Martini et al., 2020) or informal social networks as important resources (Audretsch et al., 2020) for innovation, which might impact both the understanding of and the approach to innovation in this sector.

2.3 *Research Question*

Both researchers (Martins et al., 2016; Wikhamn & Knights, 2013) and policymakers (European Commission, 2021) urge additional research on gender aspects for innovation in general and in tourism in particular (Montañés-Del-Río & Medina-Garrido, 2020; Thirumalesh Madanaguli et al., 2021). The research question is thus: How are gender differences expressed in the approach to innovation in tourism SMEs? In detail, insights into the gender-specific definition of the term innovation, the personal perception of an innovator, and the design of innovation activities (actors, levels of participation) are to be gained. The first aspect aims at a possible difference in understanding innovation (Martins et al., 2016). The second aspect addresses the firm's innovativeness (Poutanen & Kovalainen, 2017; Wynarczyk & Ranga, 2017). The third aspect is innovation design, e.g., how innovation processes are set up (European Commission, 2021). This research addresses the question from an individual actor perspective, identified as a research gap in innovation gender studies (Alsos et al., 2016). In contrast to studies that exclusively examine the perspective of women (e.g., Hozer-Kocmiel et al., 2017; Lingyan et al., 2021; Martini et al., 2020), we aim for a comparative research design with men and women to explore differences.

The role of the innovator is another aspect differing by gender (Poutanen & Kovalainen, 2017) and is perceived as primarily masculine (Bijedić et al., 2016;

Hozer-Kocmiel et al., 2017) as is entrepreneurship in general (Lindberg et al., 2014). In particular, Wikhamn and Knights (2013) speak of a masculine and feminine discourse, extending the gender perspective from a biological question towards a cultural perception of innovation. In their discussion, although not clearly defined, the feminine approach is related to openness, collaboration, creativity, and intuition, whilst the masculine is attributed to competition, control, and rationality. In their research on the opening up of innovation activities, which focused on collaboration as part of the female discourse, they found that the dominant male practices in the case company hindered or prevented communicative-collaborative behaviour. Therefore, we take two different approaches to understanding gender: firstly, according to biological gender (male and female) and secondly, on selected items to approximate the masculine and feminine discourse, following Wikhamn and Knights (2013).

3 Methodology

We took a case study approach for two reasons for this exploratory study. Firstly, we aimed to gain rich data to investigate nuances in differing perceptions regarding definitions and approaches of the complex matter of innovation, for which a case study strategy is viable (Elsahn et al., 2020). With limited previous research on gender perceptions of individual actors in the tourism sector, case designs are appropriate for a descriptive investigation of a new field (Flyvbjerg, 2006). With multiple samples to be analysed within each case (male and female of the same tourism SME) and cross-case, we intended to generate theory using the cases as inspiration (Verleye, 2019).

The cases were purposefully chosen (Ebneyamini & Sadeghi Moghadam, 2018) as illustrative cases (Elsahn et al., 2020). The three cases are German SMEs representing different elements from the tourism value chain: accommodation, tour operator, and health tourism service provider, with less than 49 employees and not at an early stage of entrepreneurship. For each SME, a female and a male representative, owners or CEOs involved with innovation and business development of the enterprise were chosen for the interview to ensure that male and female respondents refer to a similar company each (Table 1.). All three paired samples have a family relation. The semi-structured interviews were conducted from March to June 2023, lasted between 11 and 38 minutes, were recorded, and transcribed. The interviewees were asked for their gender. In addition, they were asked to identify the most important concept in three contrasting pairs as an approximation towards an attitude that can be characterised as tending towards either the feminine or the masculine discourse (Wikhamn & Knights, 2013): 1 control (masculine)/creativity (feminine), 2 competition (masculine)/collaboration (feminine), and rationality (masculine)/intuition (feminine). The prevailing discourse per interviewee was determined as follows: all three items corresponding to the feminine discourse, the overall perception of the interviewee is regarded as feminine in this study (for masculine respectively), in case of differing answers, the discourse is regarded as mixed.

Table 1 Descriptive data of the interviewees

Interviewee	I01	I02	I03	I04	I05	I06
SME	1	2	3			
Founding year	2002	2006	2003			
Employees	10	45	11			
Month/length of interview	03-2023, 11:34 min	03-2023, 20:02 min	05-2023, 12:25 min	05-2023, 20:13 min	05-2023, 20:25 min	06-2023, 38:33 min
Position	Owner	Owner, CEO	Owner	CEO	Owner	Owner, CEO
Biological gender	Female	Male	Female	Male	Female	Male
<i>Discourse items (M masculine, F feminine)</i>						
Control (M)/ Creativity (F)	Creativity (F)	Creativity (F)	Creativity (F)	Control (M)	Creativity (F)	Control (M)
Competition (M)/ Collaboration (F)	Collaboration (F)	Collaboration (F)	Collaboration (F)	Collaboration (F)	Collaboration (F)/ (Competition less)	Competition (M)/ (Collaboration less)
Rationality (M)/ Intuition (F)	Intuition (F)	Intuition (F)	Rationality (M)	Rationality (M)	Intuition (F)	Intuition (F)
Prevailing discourse	Feminine	Feminine	Mixed	Mixed	Feminine	Mixed

For analysing the data, we followed the qualitative content analysis process of Mayring (2022) on building codes inductively. Mayring describes this method as “very fruitful” (Mayring, 2022, p. 84) for qualitative approaches as it focuses purely on the material, suiting our research question to elaborate on differences in an individual actor perspective. Following Mayring’s process, four themes for the inductive codes built the frame for defining the codes and were applied first to the material:

- INNODEF—understanding of the term innovation
- INNOORG—perception of innovativeness of the organisation
- INNODES—design of innovation process regarding actors and their participation
- INNOSUC—measurement of success of innovation

Two coders coded the material under these themes using the software MAXQDA. After the initial coding, a coding conference (Mayring, 2022) was held to discuss differences and to adjust the coding framework. To increase the validity, the text phrases for the codes were compared for homogeneity, thus the semantic validity (Mayring, 2022). The adjusted coding framework was then merged and applied to the material. Afterwards, the derived codes were contrasted between male and female interviewees and according to the masculine (M)–feminine (F) discourse (Wikhamn & Knights, 2013).

4 Results and Discussion

4.1 *Prevailing Discourse*

Three women and three men participated in the study. Applying the selected items to determine their prevailing discourse, in the study, the feminine and the mixed discourse were attributed to three interviewees each (mix of men and women); a pure masculine discourse was not found in these samples. The following results on INNODEF, INNODES, and INNOSUC are presented both from a biological gender perspective and clustering the data on its prevailing discourse (feminine/mixed).

4.2 *Definition of Innovation*

On the definition of innovation (INNODEF), we observed a large overlap for female and male samples with no significant differences (Fig. 1). Three main aspects were mentioned by the interviewees when defining innovation: type, scope, and benefit. Female interviewees tended to have a softer stance towards innovation, also comprising further development or adaptation of existing solutions. Largely, the definitions given correspond to the elements of the generic definition of innovation in the Oslo Manual, according to which a business innovation is “a new or improved

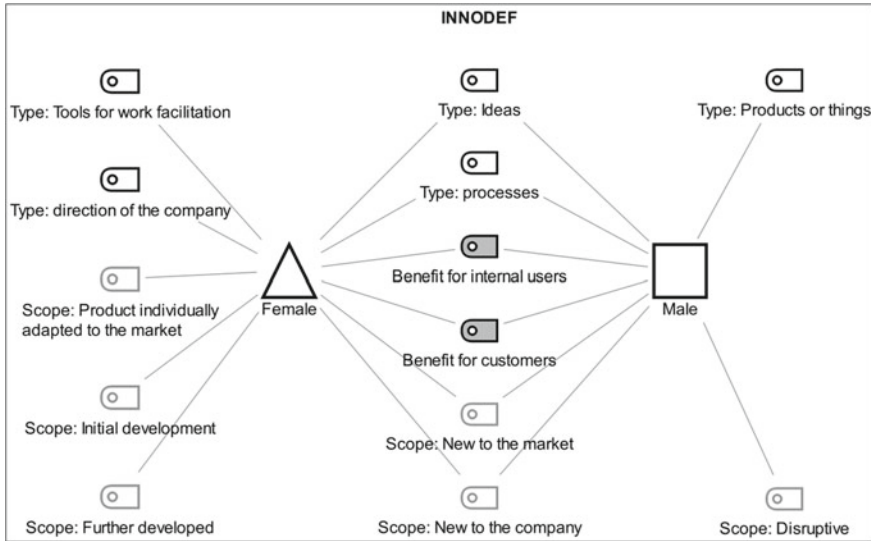


Fig. 1 Code comparison of female and male samples—INNODEF

product or business process (or combination thereof) that differs significantly from the firm’s previous products or business processes and that has been introduced on the market or brought into use by the firm” (OECD/Eurostat, 2018, p. 68).

Analysing the dataset from the perspective of the prevailing discourse, there is a large overlap in the interviewees’ perceptions; however, those tending to the feminine discourse provide broader definitions, especially in terms of the scope from disruptive to incremental, further developed items (Fig. 2). That finding aligns well with Martins et al. (2016, p. 122) study with nursing entrepreneurs, identifying a “new version of innovation, to ‘do something different from the usual’” and directly relating this view to femininity. Accepting also small changes as innovation seems to be similar in the tourism industry according to the findings of this study, confirming that the perception of innovation is industry-specific. It further suggests that in industries with physical human contact that have a high share of female entrepreneurs (Commission, 2021) such as the tourism sector, the feminine discourse prevails and includes a broad understanding of innovation, including routine innovation. Although certainly not gaining the same public attention as disruptive, world-new innovations and high-value patents, these routine innovations provide the companies with the necessary means for long-term establishment and thriving: the three sample SMEs have been in the market for 17 to 21 years in line with Pisano (2015) stressing the positive effect of leveraging the existing technological base and business model for innovation purposes on the bottom line.

- Proposition 1: In tourism SMEs, characteristics of the feminine discourse prevail in different sectors of the tourism value chain.

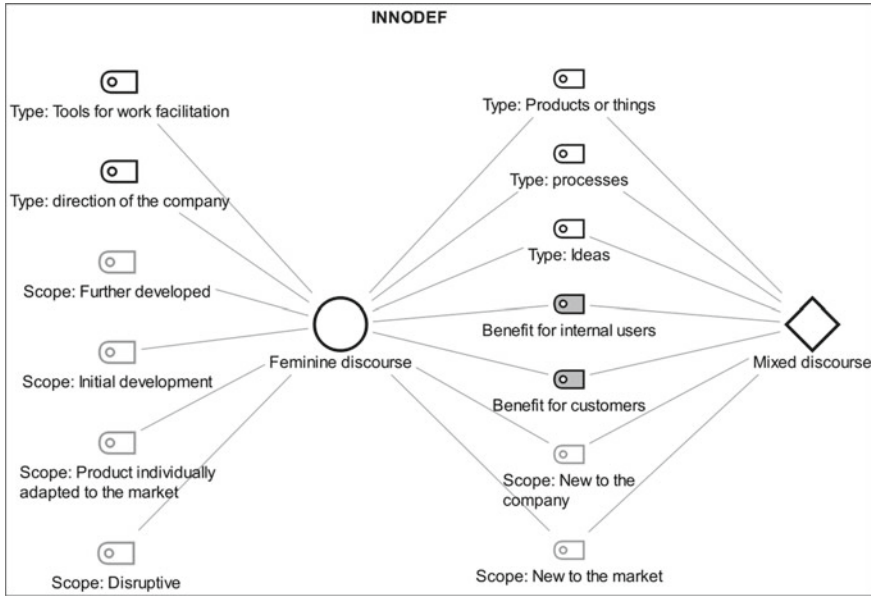


Fig. 2 Code comparison of feminine and mixed discourse samples—INNODEF

- Proposition 2: In tourism SMEs, innovation is understood broadly, in a low-threshold manner embracing routine innovation.
- Proposition 3: The prevailing feminine/mixed discourse explains the low-threshold approach to innovation better than a biological gender perspective.

4.3 Design of the Innovation Process

To assess the design of the innovation process (INNODES) regarding the openness towards external actors and their participation, the interviewees described a typical process of their innovation activities. The resulting codes relating to the involvement of external actors were selected as open innovation activities for further assessment. The results showed that all three SMEs involve external actors in their innovation activities, making open innovation with purposively managing knowledge across organisational boundaries (Chesbrough, 2003) a common approach in all three cases. However, unlike Lindberg et al. (2014), we found no intermediaries or non-governmental organisations involved in the innovation activities, nor destination management organisations, which themselves consider participation in various types of innovation projects with tourism service providers (Marx & Arens, 2023).

The comparison of female and male samples (Fig. 3) demonstrates a strong overlap in the types of actors involved: customers, suppliers, professional colleagues (trade shows, networks), and even competitors. Male interviewees included universities

or professional journals as additional sources. Both genders focus on opening the innovation process in the idea stage, yet hardly in the development stage. In the development stage, owners and selected employees of the SMEs are involved in varying degrees of participation.

In contrast to Wikhamn and Knights’s (2013) research in the automotive industry, we found no dominance of the masculine discourse in the selected sample of tourism SMEs. The tendency towards valuing items of the feminine discourse, or at least a mix of items, might explain the observed general openness towards collaborating with various actors (Fig. 4).

Directly asked about gender differences in innovation activities, all interview partners acted somewhat contradicting in their answers. The impression is that the question took them by surprise, which indicates that gender differences are at least not a dominant figure in tourism innovation activities from the perception of SME owners and managers. Variation in the actors’ engagement strength, form, or quality is rather related to, first and foremost: personality (I03: “this is rather a question of personality,” I06: “it’s personality, is not necessarily male or female”), but also profession (I04: “in gastronomy, the willingness is not so high”), or industry (I06: “if you’re in the banking world, it is going to be more cut-throat and it’s much different”). Based on the findings, following the feminine and masculine discourse

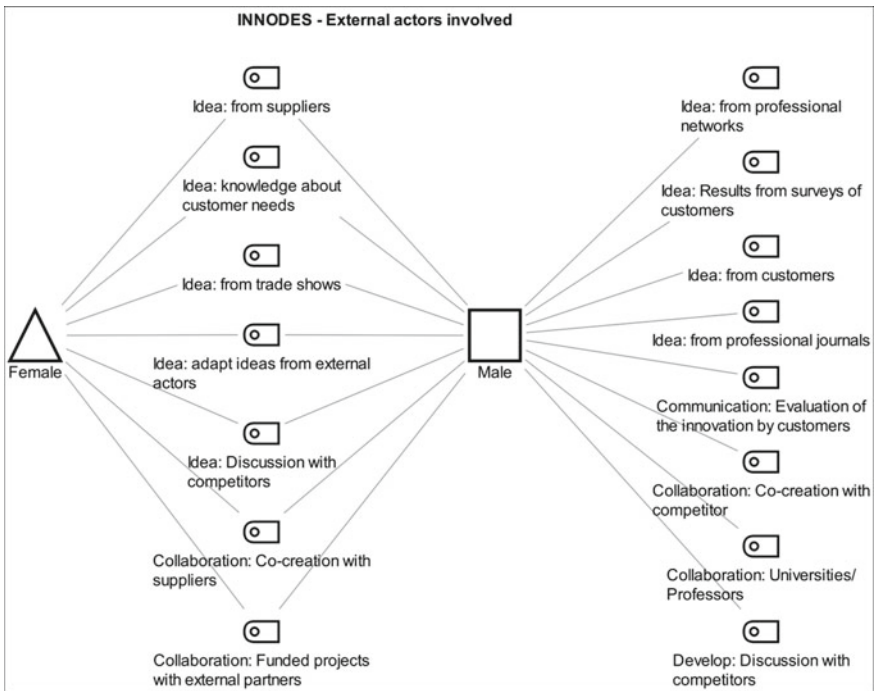


Fig. 3 Code comparison of female and male samples—INNODES

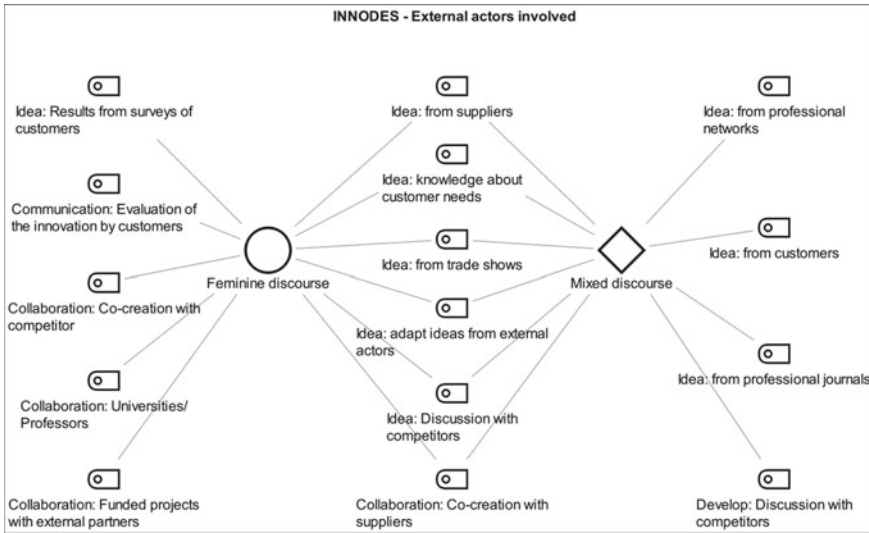


Fig. 4 Code comparison of feminine and mixed discourse samples—INNOCES

in future innovation research seems most promising, with potential for comparison across industries.

- Proposition 4: In tourism SMEs, both men and women involve various external actors in open innovation activities, mainly in the ideation stage.

4.4 Success of Innovation

The interviewees measure innovation success (INNOSUC) by a broad range of items. Quantitative (Return on investment (ROI), turnover, sales) and numerous qualitative items referring to internal and external relations are mentioned (Figs. 5 and 6—external actors in italics). Two interviewees (I02; I05) even explained innovation success by innovation that failed, implying an acceptance of failure and learning in the innovation process. In evaluating the success of innovation, female and male interviewees (Fig. 5) show a considerable overlap in aspects that indicate success. However, female interview partners rather relate their judgement of innovation success to a range of external parties (e.g., competitors, certification bodies, suppliers, and customers), whilst male interviewees focus on aspects relating to customers and the team internally. This might point to female entrepreneurs being more prone to external orientation not only in acquiring knowledge for innovation (Audretsch et al., 2020; Biscione et al., 2022; Martini et al., 2020) but also in judging the success of innovation.

Whilst the quantitative measures of innovation success are mentioned by both groups (feminine and mixed discourse), those interviewees of a pure feminine

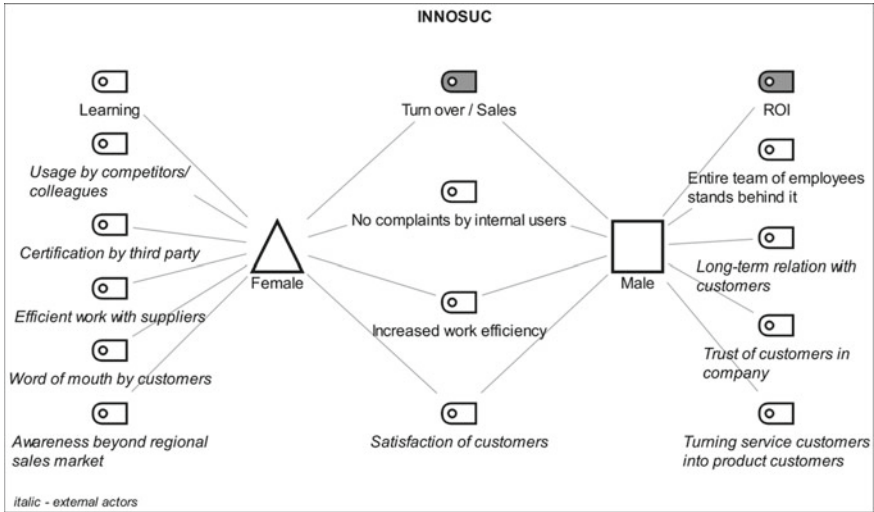


Fig. 5 Code comparison of female and male samples—INNOSUC

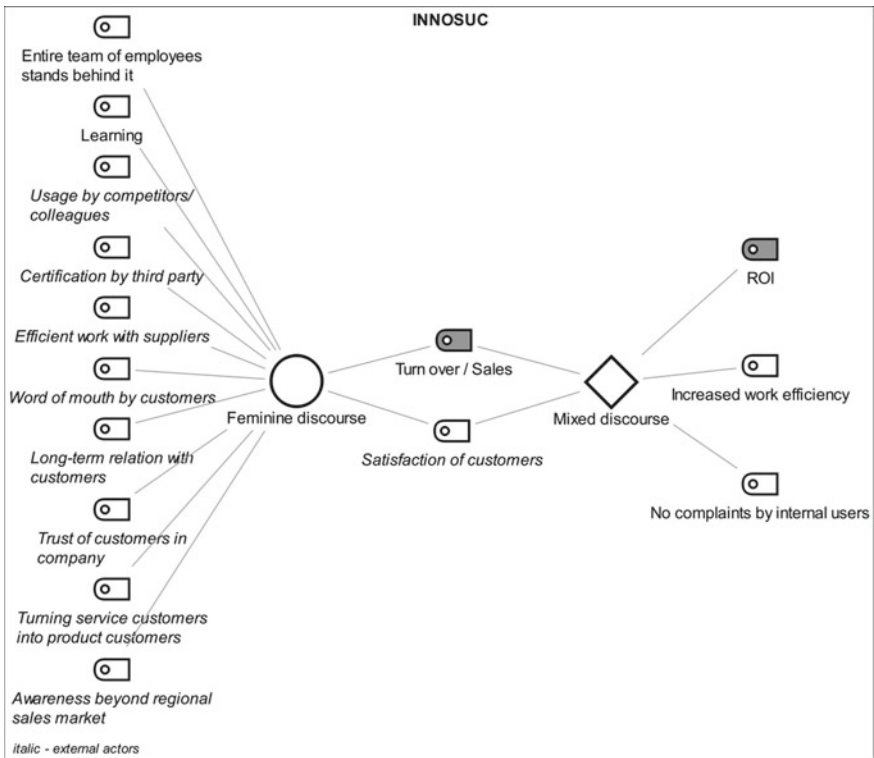


Fig. 6 Code comparison of feminine and mixed discourse samples—INNOSUC

discourse display a far broader range of factors characterising the success of innovation (Fig. 6). The tourism sector seems more influenced by a feminine discourse or at least by parts of its characteristics, thus differing from other sectors. Therefore, such a broad range of attributes associated with innovation success might explain the varying perception of innovativeness of the tourism sector in the literature. The sector produces a networked product with several actors delivering varied items along the tourism supply chain (Zhang et al., 2009). The variance of these actors, as displayed by the range of the three SMEs in this study, further explains the variety of innovation's success attributes.

- Proposition 5: In tourism SMEs, female entrepreneurs consider the views of various stakeholders when evaluating innovation success.

Interestingly, all three paired samples judged the innovativeness of their SMEs on the same level (SME 1 high, SME 2 medium, SME 3 medium), with various explanations for this judgement (see Table 2, section INNOORG). Thus, on a company level, there are certain agreements when evaluating the same organisational entity, eventually also extendable to this level of the tourism value chain, which would have to be investigated by future research.

5 Conclusion

The research dealt with how gender differences are expressed in the approach to innovation in tourism SMEs. The study followed a comparative research design to investigate differences in how female and male entrepreneurs perceive innovation. The study developed five propositions based on three tourism value chain cases. The general openness to involve a diverse range of actors in innovation activities, to embrace a wide variety of measures for innovation success, and to regard routine innovation new to the firm as a valid view on innovation characterises the researched SMEs from the tourism sector, and proves successful in establishing thriving companies. The discourse of a feminine or masculine approach can differ from the biological gender and tends towards a feminine approach in tourism SMEs. Specific indicators to measure the innovativeness of the sector seem to be a prerequisite for evaluating innovation through public funding and private investment.

The paper adds to understanding the grasp on innovation and innovation activities from women and men owning and managing tourism SMEs. Practitioners may consider this broad definition of innovation and success, especially when planning inter-organisational projects or DMO initiatives. The research is based on three cases with paired samples, thus qualitative and exploratory. However, the samples were chosen from different elements of the tourism value chain to increase generalisation for the sector and of the dominant size of companies in the sector (SMEs). A coding conference countered bias in coding to reach an inter-coder agreement. Another limiting factor is the selection of three random items to evaluate the masculine or feminine discourse preference of the interviewees, which requires further testing and

Table 2 Final code system

Code system	
<i>INNODEF</i>	
Scope of innovation	Scope: further developed
	Scope: initial development
	Scope: product individually adapted to the market
	Scope: new to the company
	Scope: new to the market
	Scope: disruptive
Beneficiary of innovation	Benefit for internal users
	Benefit for customers
Type of innovation	Type: tools for work facilitation
	Type: direction of the company
	Type: processes
	Type: products or things
	Type: ideas
<i>INNOORG</i>	
Medium innovative	Medium: re-using offers on the market, e.g., software
	Medium: comparison to competition, e.g., top one-third, not top
	Medium: not as high frequency as others
	Medium: check if new offers suit their company
	Medium: too specific requirements/no standardisation
	Medium: innovating from necessity (scarce resources)
	Medium: general
Very innovative	High: job enrichment
	High: cross-Selling
	High: comparison to competition
	High: provides consultation for others
	High: participates in research projects
	High: provides broad service for customers
	High: general
<i>INNODES</i>	
Communication	Communication: explain background and goal
	Communication: with interviewee partner
	Communication: team discussion
	Communication: in small groups
	Communication: evaluation of the innovation by customers
Collaboration	Collaboration: co-creation with competitor
	Collaboration: universities/professors

(continued)

Table 2 (continued)

Code system	
	Collaboration: co-creation with suppliers
	Collaboration: funded projects with external partners
Ideation	Idea: through discussion with employees
	Idea: results from surveys of customers
	Idea: discussion with competitors
	Idea: from customers
	Idea: by interviewee's partner
	Idea: by employee
	Idea: from trade shows
	Idea: from suppliers
	Idea: from professional journals
	Idea: from professional networks
	Idea: motivating employees to generate ideas
	Idea: by interviewee
	Idea: adapt ideas from external actors
	Idea: by interviewee couple
Idea: knowledge about customer needs	
Development	Develop: development through outline concept
	Develop: discussion with competitors
	Develop: diffusion driven by interviewee couple
	Develop: test the idea on small scale
	Develop: discussion with partner of interviewee
	Develop: participation selected employees in early stage
	Develop: partner of interviewee drives development
Develop: small groups of staff for discussion	
<i>INNOSUC</i>	
External	Usage by competitors/colleagues
	Certification by third party
	Efficient work with suppliers
	Word of mouth by customers
	Long-term relation with customers
	Satisfaction of customers
	Trust of customers in company
	Turning service customers into product customers
	Awareness beyond regional sales market
Internal	ROI
	Turn over/sales

(continued)

Table 2 (continued)

Code system	
	Increased work efficiency
	Entire team of employees stands behind it
	No complaints by internal users
	Learning

validation in future research. Moreover, the propositions should be tested quantitatively, in larger companies, and in other industries based on the masculine–feminine discourse.

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The Digital Transformation of Hybrid and Virtual Meetings and Events in the Greek Meetings Industry



Athina Papageorgiou and Alexandra Chalkia

Abstract The COVID-19 pandemic has changed the way conferences and events are organized. The need to avoid congestion and minimize transportation has resulted in a shift toward virtual platforms. Our work aimed to compare the attractiveness of virtual and physical meetings and events using a comprehensive questionnaire and literature review. Our research revealed that younger individuals prefer to participate in virtual events, whereas older individuals favor physical participation. In-person congresses offer a more stimulating experience than virtual ones that need to adopt ways to enhance interactivity in order to attract a wider audience.

Keywords Hybrid meetings · Virtual meetings · Event organization · COVID-19 · Professional congress organizers · Audiovisual equipment · Rental companies · Hotels

JEL Classification Z31 · Z32

1 Introduction

The onset of the COVID-19 pandemic has stimulated a shift toward the use of virtual platforms for the organization and conduct of conferences. This transition offered new opportunities to attendees who could participate digitally in a conference, reducing or even eliminating the need for physical travel to the destination, as well as the danger of contamination.

Ansah et al. (2023) state that during the past three years and at the early pandemic phase, meetings and conferences altered entirely from physical to virtual; then, during the more recent phases, meetings and conferences became both hybrid and physical while purely virtual conferences minimized. This change toward virtual and hybrid events required several adjustments, such as unlimited internet accessibility,

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ease in connectivity, coordination across different time zones, overcoming language barriers, fostering innovation and networking opportunities, and new approaches for the socialization of attendees; conference organizers needed all that to enhance the quality and appeal of these types of events (Ansah et al., 2023; Bukovska et al., 2021).

2 Technology and Digital Transformation

The digitalization of meetings and events has concerned researchers for at least a quarter of a century. During the 1980s, companies began to utilize virtual meetings sporadically to minimize expenses for corporate gatherings. By the turn of the century, various corporations had already integrated virtual meetings aiming not only to reduce business travel costs but also to minimize the time that employees spend away from the office (Sox et al., 2017). Communication technologies such as Skype and WebEx emerged toward the end of the twentieth century, but it was the aftermath of the 2008 financial crisis that significantly altered the mindset surrounding business meetings and events under the pressing need to cut down expenses related to travel and accommodation (Hammoud et al., 2022). Although some large virtual conferences were organized at the time, such as the FCVV conference in 1994 (Lecueder & Manyari, 2000) and the Environment Conference in 1997 (Davidson et al., 2002), these events were a handful compared to in-person ones. The onset of the COVID-19 pandemic in 2020, which led to the minimization of in-person conferences, has caused a substantial surge in the demand for virtual meetings and conferences (Chalkia & Papageorgiou, 2022).

Piccioni et al. (2023) emphasize that the pandemic affected the Meetings Industry in two ways. Primarily, it vastly impacted the revenue of the event industry due to the implemented restrictions on travel and gathering. Secondly, it compelled the conference and events industry to quickly find and implement technological alternatives to ensure the continuation of events and conferences activities; digital platforms such as YouTube and Zoom were used in most events and meetings during the pandemic. Since then, the COVID-19 pandemic has accelerated digital conferences and events, necessitating the exploration of new methods to ensure problem-free operation of the meeting industry (Bukovska et al., 2021; Papageorgiou & Chalkia, 2023).

3 Hybrid and Virtual Meetings and Events

According to the UNWTO (2023), the tourism sector recovered during the first quarter of 2023, with international arrivals reaching 80% of those in 2019. In addition, the international tourism financial operation's circle doubled as compared to 2022.

The Greek Meetings Industry suffered great losses during the pandemic (Papageorgiou & Chalkia, 2023). However, the latest INSETE study (Ikkos & Koutsos,

2023) states that in 2022, inbound tourism experienced a significant increase in tourist arrivals for the second consecutive year after the pandemic (+89.3%, from €14.7 million in 2021 to €27, 8 million in 2022) as well as in tourism receipts (+69.1%, from €10.3 billion in 2021 to €17.5 billion in 2022).

For the Meetings Industry, ICCA (2023b) states that in 2022, Greece welcomed 185 association meetings and rose to the thirteenth (13) position of the worldwide index, gaining eight (8) places as compared to the 2019 ranking. The city of Athens is also popular for association meetings, being in the eighth (8) position with 109 association meetings, that is nine (9) places higher than 2019.

In 2022, a sharp decrease in virtual meetings and events (ICCA, 2023a) was observed compared to the pandemic years (2020 and 2021). It is becoming evident, however, that hybrid events will slow down in future years with the increasing trend toward in-person meetings, while in an ICCA (2023c) study, 51% of associations will hold their meetings in person in 2023, compared to 41% in 2022 and 14% in 2021. In contrast, the majority of associations stated that they would use hybrid/digital alternatives in their future meetings.

4 Assets and Liabilities of Hybrid and Virtual Meetings and Events

Both hybrid and virtual meetings have advantages and disadvantages, some of which are commonly shared, as hybrid meetings are a combination of in-person and virtual meetings.

4.1 *Virtual Events*

The implementation of virtual events was a necessity because of COVID-19 restrictions. Virtual conferences and events came with a significant number of **benefits**, some of which are as follows.

- **Accessibility.** The conveniences of a virtual conference are truly remarkable, enabling attendees to participate from any corner of the globe, as long as an internet connection and a computer or smart device are at their disposal. This convenience is also beneficial for delegates who find themselves hindered by a range of factors such as financial constraints, time limitations, limited vacation days, and disability. Indeed, through the utilization of supporting technologies, such as sign language interpretation, subtitles, and voice ordering, accessibility and participation for disabled individuals are greatly enhanced (Gupta et al., 2022).
- **Reduced Costs.** The event host obtains substantial benefits as expenses associated with catering, conference venue rentals, and other infrastructural necessities are

effectively eliminated. Furthermore, the financial cost for participants is significantly lower in virtual conferences, as compared to the in-person events. Travel and accommodation expenses are also eliminated, providing attendees with the opportunity for substantial savings (Fraser & Mancl, 2023; Gupta et al., 2022).

- **Flexibility in Content Delivery.** With the advent of digital resources, conference organizers now possess the means to offer attendees an unprecedented level of convenience. Through the utilization of live streaming and archived videos, delegates can access essential keynotes and lectures as well as the entire conference itself. This newfound flexibility accommodates individuals located in various time zones or burdened with conflicting schedules, liberating them from the constraints of traditional conference formats (Foramitti et al., 2021; Gupta et al., 2022).
- **Ease of Data Collection and Analysis.** Through the utilization of diverse online conference platforms, an abundance of information pertaining to participants, sessions, expenditures, and more can be accumulated effortlessly. These data can subsequently be examined by the organizer, enabling them to discern patterns regarding delegates' engagement with conference topics, the extent of audience reach facilitated by sponsors, the financial outlay incurred, and ultimately, the generated profits.
- **Sustainability.** Virtual conferences are a sustainable solution that champions the preservation of natural resources, as they prevent the need for printing and dramatically limit energy and water consumption as well as waste production, among other benefits. Moreover, by eliminating the necessity for delegate travel, these digital gatherings play an important role in mitigating carbon dioxide emissions (Faber, 2021; Foramitti et al., 2021; Gupta et al., 2022).
- **Reduced Risk.** Virtual conferences are organized with greater ease and efficiency than physical conferences. In contrast to in-person gatherings that are susceptible to disruptions caused by inclement weather or labor disputes, virtual meetings are practically immune to cancellations, as long as the requisite precautions are taken to ensure uninterrupted operations. This entails enlisting a dependable broadband provider and preserving recordings of conference speakers, thereby enabling attendees to access content in the event of connectivity issues or unforeseen obstacles (Gupta et al., 2022).

Accordingly, virtual events and conferences have **limitations** such as:

- **Destination.** Delegates find themselves unable to partake in the destination's amenities, gain experiences, and immerse themselves in cultural exchanges. The absence of destination from virtual conferences inevitably results in a decline in profits for Professional Conference Organizers (PCO's) and Destination Management Companies (DMC's). Moreover, opting for virtual conferences deprives destinations of substantial tourism traffic and revenue (Standaert et al., 2022).
- **Communication.** The challenge of effective communication among delegates, chairpersons, and conference speakers is amplified when the delegate count is substantial (Foramitti et al., 2021). The limited timeframe for interaction and the number of available opportunities for questions or discussions per session

can pose significant obstacles (Papageorgiou & Chalkia, 2023). Although technological tools such as chat rooms, social networks, and Q&A platforms provide some assistance, the task of collating questions has become more demanding, particularly in the context of live-streamed conferences.

- **Physical Contact and Networking.** In virtual conferences, delegates find themselves lacking the same level of interaction that would occur in in-person gatherings. Without the opportunity for shared meals, welcoming and farewell events, and other extracurricular activities, delegates have limited opportunities for meaningful engagement and discussion. As a result, the development of trust and the fostering of connections between participants are hindered, further emphasizing their physical separation (Falk & Hagsten, 2020; Gupta et al., 2022). Although efforts have been made to replicate the conference experience through applications and chat rooms utilizing augmented and virtual reality technologies, these attempts fall short of providing a truly satisfying substitute.
- **Time Zones.** As virtual meetings are broadcasted globally, it is a challenge to accommodate all the needs of attendees, considering the different time zones in which they live (Falk & Hagsten, 2020). Organizers must be considerate of these needs when scheduling for the event and adjust the program or even the way the content is broadcasted (live, on-demand, etc.) accordingly.
- **Technical Difficulties and Support.** The presence of a reliable broadband internet provider is crucial for the seamless transmission of a web conference. If the provider fails to meet minimum requirements, the risk of conference failure becomes evident. As the entire organization relies heavily on the webcast, it is imperative to take all necessary precautions to prevent system failures (Falk & Hagsten, 2020; Gupta et al., 2022), such as ensuring the availability of a backup router for wireless or satellite internet connections. Thorough rehearsals with speakers are essential to ensure smooth connectivity and adherence to the program. If a speaker encounters difficulties in connecting, arrangements must be made to record their speech as a precautionary measure. Technical support is essential for both the equipment used in the virtual conference and the equipment utilized by speakers participating remotely. Clear instructions should be provided to speakers regarding the timing of their presentations and the procedure for logging into the platform to deliver their talks. Meticulous attention to detail holds great significance in virtual conferences, and careful planning is key to avoiding any unforeseen mishaps.
- **Generational Requirements.** Younger delegates readily embrace the incorporation of technology during meetings, whereas older delegates may not share the same sentiment. The diverse needs of meeting attendees vary depending on their generational background. Baby boomers (1946–1964) seek user-friendly technological solutions, Generation X (1965–1978) prioritizes content quality and Generation Y (1979–2000) insists on the inclusion of social networking and gamification elements within their meeting experiences. While organizing a digital event, all of these distinct generational prerequisites must be considered (Sox et al., 2017).
- **Data Security.** Virtual conferences have unique characteristics, such as webcasting, online registration, online participation, and online accumulation of

various data, and are vulnerable to cyberattacks, primarily aimed at intercepting private information (Kagan et al., 2023). Consequently, it is imperative to anticipate and safeguard the conference's data integrity and transmission, along with the personal information of its attendees, against malicious digital intrusions. This objective can be achieved by cautiously selecting trustworthy platforms and ensuring adequate technical support.

- **Effects on Delegates' Health.** Engaging in a virtual conference necessitates a fixed gaze upon the screen, a practice that has been documented to induce weariness among conference attendees and has been suitably named "Zoom Fatigue" or "Videoconference Fatigue" (Foramitti et al., 2021). Moreover, visual distress and headache, along with musculoskeletal strain in the form of back and neck discomfort due to sedentary habits and poor posture, have been widely reported (Desai et al., 2020). To mitigate these adverse consequences, event organizers must ensure the provision of more frequent and lengthy intermissions throughout sessions.
- **Overall Experience.** The virtual conference participant is deprived of the benefits offered by attending an in-person conference, including the incorporation of diverse experiences, the opportunity for recreation, the immersion in novel cultures, and the revitalizing feeling of a retreat-like ambiance (Roos et al., 2020).

4.2 *Hybrid Events*

Because hybrid events are a blend of virtual and in-person events, the advantages and disadvantages of virtual events apply to online attendees. However, there are some additional **advantages** to the physical aspects of hybrid meetings (Papageorgiou & Chalkia, 2023):

- **Destination.** The allure of the destination remains a pivotal factor in the success of hybrid conferences, with attendees gravitating toward a particular conference amidst an abundance of comparable options, allured by the irresistible charm of the chosen locale.
- **Attendance.** Hybrid meeting attendees have the option of engaging either in person or virtually, thereby offering a versatile means of participation that has the potential to capture a broader audience. Additionally, keynote speakers are endowed with this same pliable alternative, affording them the opportunity to overcome potential hindrances, such as travel constraints or other limitations.
- **Physical Contact and Networking.** In contrast to their virtual counterparts, those fortunate enough to attend meetings in person reap the rewards of engaging directly in meaningful interactions with esteemed speakers and fellow participants, exchange innovative ideas, and cultivate valuable connections. Furthermore, they enjoy meals, welcome and farewell events, and the possibility of embarking on immersive excursions and tours.
- **Space Capacity.** Large-scale physical meetings inquiring ample spaces and accommodations were limited to select cities possessing suitable conference facilities

and a plethora of hotel rooms. However, hybrid events have expanded the possibilities, allowing a broader range of destinations to participate in the bidding process, increasing their odds of securing such events—a privilege previously beyond their reach (CBI, 2021).

Accordingly, there are some **shortcomings** to the physical aspects of hybrid meetings:

- **Communication.** Numerous online participants encounter difficulties and time constraints when attempting to engage with the chair and fellow delegates. Owing to the limited duration of the sessions, establishing connections or seeking clarification via response systems, chat rooms, or social media proves to be a challenging endeavor. The allocation of time becomes even more constrained as speakers struggle to promptly address and organize questions from remote attendees in real time, while the physical participants in the room continue to pose their own inquiries (Papageorgiou & Chalkia, 2023).
- **Cost and Logistics.** The integration of physical and virtual elements in hybrid meetings necessitates careful planning and organization. Event organizers must ensure the availability of audiovisual equipment, technical support, and other resources for virtual attendees, while also making arrangements for the comfort and convenience of those physically present, including meals, accommodation, transportation, and activities. This complex and time-consuming process poses a significant challenge for professional conference organizers, who must cater to the needs of both types of participants as well as speakers.

5 Research Aims and Methodology

This paper aimed to assess the level of acceptance between virtual/hybrid and in-person meetings among different demographic groups. Individuals should have participated in meetings and conferences, regardless of the type of meeting: virtual, hybrid, or in person. Our objective was to examine how participants perceive the digital event experience to identify ways to enhance this experience and participants' satisfaction.

To meet the aims of this study, we used a carefully crafted questionnaire serving as the primary data-collection tool. The questionnaire comprised of 25 multiple-choice and linear scale questions and was sent via email to 12 conference and event organizers who were then requested to forward it to their clients and congress attendees. Participants completed the questionnaire anonymously.

We obtained 138 complete questionnaires collected from March to May 2023. Data were analyzed using the SPSS v27.0.

6 Results

Of the 138 respondents, 57 (41.3%) were men and 81 (58.7%) were women. The sample was distributed almost evenly into five age categories: 18.5% between 18 and 29 years of age, 24% between 30 and 39 years of age, 23.3% between 40–49 and 50–59 years of age, respectively, and 11% over the age of 60.

Education level is shown in Table 1.

Respondent’s income is shown in Table 2.

The next line of questions requested answers at a scale between 1 and 5 and the results are shown in Table 3.

Using the Mann-Whitney Test, we also found that respondent’s age and sex did not affect these questions. Statistical analysis, however, using the post-hoc test, revealed that those who favor digital/hybrid events are the individuals between the ages of 18 and 29, especially when compared to those aged 40–49, and also people with a PhD degree and an annual income between €21,000 and €30,000.

Furthermore, the vast majority of the respondents (97.3%) had attended a digital or hybrid event and, if given the choice between attending a physical or a digital event, the majority (74.7%) would choose a congress with physical presence. Those who prefer in-person events are more likely to agree that digital events are less interesting than physical events, but more affordable than physical ones and thus more eligible to a wider audience than the physical ones. On the other hand, those who prefer digital events are more satisfied with the modern platforms used for digital/hybrid events, which enable an event to be held successfully online: they also think that digital events can replace physical ones and become the new normal, as they are

Table 1 Respondents’ education level

Education	Frequency	Percent
High school	34	24.6
University	43	31.2
Master degree	51	36.9
PhD	10	7.3
Total	138	100.0

Table 2 Respondents’ income

Income	Frequency	Percent
Up to 10.000€	22	15.1
11.000–20.000€	66	45.2
21.000–30.000€	47	32.2
31.000–40.000€	9	6.2
Over 40.000€	2	1.4
Total	146	100.0

Table 3 Respondents' replies to linear scale questions

Question	Min	Max	Mean	Std. deviation
"COVID-19 pandemic affected events industry"	3	5	4,49	0.528
"An event may successfully be organized through digitally"	1	5	2,88	1.023
"Digital events may replace in-person ones as part of the new normal"	1	5	2,72	1.119
"Digital events are more environmentally friendly than the in-person ones due to the reduced emission of pollutants"	2	5	3,82	0.682
"Hybrid events are a good solution as they combine the strong points of both digital and in-person events"	2	5	3,45	0.879
"Livestreaming in digital/hybrid events may improve if participants are familiar to the platform used"	3	5	4,04	0.751
"Digital events may improve and operate smoothly if main speakers and participants use high-speed internet"	3	5	4,15	0.746
"Digital events may improve and become more interactive if delegates can participate in polls, questions to the speakers and rewards"	3	5	4,05	0.750
"Digital events may improve if socialization and networking of delegates is promoted"	3	5	4,11	0.716
"Digital events can facilitate communication and exchange of views between delegates"	2	5	3,31	1.034
"Digital events have less interest than in-person ones"	1	5	3,59	1.213
"Digital events are less expensive than in-person ones due to the absence of transportation and accommodation and reduced participation fee"	2	5	4,08	0.814
"Infrastructure for operating digital/hybrid events (high-speed internet, fully equipped conference rooms) is sufficient in Greece"	1	5	2,23	0.853
"I face problems with technology during virtual/hybrid events"	1	5	3,41	1.184
"Virtual/hybrid events are more affordable than in-person ones"	2	5	3,80	0.844
"I am satisfied of the operation of digital platforms (Microsoft Teams, Zoom, etc.) used in virtual/hybrid events"	1	5	3,13	0.912
"It is good to combine an in-person event with tourist activities at the destination"	3	5	4,37	0.538

more environmentally friendly while maintaining communication and exchange of views between participants.

7 Discussion

This research revealed that individuals have many reasons for favoring digital or hybrid events over their physical counterparts. Initially, there is a profound sense of confidence in the ability of digital events to match not only the operating success of physical gatherings, but also the exchange of ideas and the meaningful communication, as the current experience from meetings and events platforms is considered to be satisfactory. Additionally, individuals think that digital events are more environmentally friendly and cost-effective in comparison to their physical counterparts.

Furthermore, there is a prevailing perception that digital events do not have the potential to fully replace physical gatherings but can become an integral part of the new societal norm, as they can reach and engage a broader audience, in contrast to physical ones. They will however remain a useful tool for staff meetings, seminars, small executive meetings, and other similar events.

It seems that physical attendance, socialization, and the various opportunities for entertainment offered at the destination cannot be replaced by digital events. Hence, in order to garner greater appreciation and acceptance from attendees, organizers of digital/hybrid events design a more engaging framework; according to the literature, achieving this objective is feasible through augmenting interactivity and embracing the concept of "gamification", i.e. adding game-like elements to the organization process in order to encourage participation. Further research is needed for the identification and implementation of practical initiatives and remedies to enhance digital and hybrid conferences and events.

8 Conclusions

This research revealed that younger delegates (18–29 years of age) prefer virtual and hybrid events over physical ones while those between 40 and 49 years of age prefer physical meetings. Also, participants with higher education and higher income prefer digital over physical events.

Despite the recovery of the meetings industry after the pandemic, virtual and especially hybrid events will continue to attract a significant number of participants, as they offer numerous advantages for both participants and organizers. This study also found that younger individuals tend to prefer attending events digitally, while older ones show a preference for physical attendance, aligning with the existing literature. Overall, 74.66% of the respondents stated that they prefer to attend meetings physically, as they find them more interesting: this means that digital/hybrid events should find new ways to increase the level of socialization and entertainment, possibly through interactivity. Indeed, physical events are generally regarded as more appealing due to their inherent intrigue, in contrast to digital events. By enhancing the interaction between in-person and virtual attendees, digital events can become more

captivating and interesting. Furthermore, the incorporation of gamification elements in virtual and hybrid meetings could further increase engagement among virtual participants. Leveraging digital technologies like augmented and virtual reality, as well as artificial intelligence, may prove beneficial in this regard.

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Leaders' Psychopathic Traits in the Dynamic Context of Tourism Ventures: The Impact of Boldness on Managers' Unethical Leadership and Unethical Employees' Behavior Toward Customers



Vasiliki Chatzi and Aikaterini Galanou

Abstract Given the increased demand for entrepreneurial success, it is important for businesses to comprehend how they can retain a base of loyal customers through their employees' compliant behavior. Although psychopathy among leaders and managers in various corporate and financial contexts has been identified as a potent underlying factor affecting employee attitudes and team functioning and ultimately organizational performance, empirical research has lagged behind. The purpose of the present study was to investigate the association between managers' psychopathic traits (boldness) and service behavioral intentions of hotel employees. Empirical data were collected from 179 managers of the Greek hotel sector. A structural equation model analysis was followed. The results provide empirical evidence for all suggested hypothesized associations. In particular, the findings display that managers' boldness predicted unethical leadership, which in turn positively associated with unethical employees' behavior toward customers. The current work provides practical contributions for professionals in the hotel setting, who come up with the challenge to enhance their customers' loyalty through higher expectations of employee behavior.

Keywords Unethical leadership · Boldness · Psychopathic traits · Employee behavior · Hotel industry · Greece

JEL Classification Personnel management-executives · Executive compensation

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1 Introduction

Companies have positive duties toward all stakeholders, which are only constrained by negative duties (such as not doing harm and not breaking the law), but some stakeholders can be more important than others (Mitchell et al., 1997). Stakeholder theory in that sense offers no normative basis for stakeholder prioritization, as companies and their managers can pick and choose depending on their own preferences and what fits them best. After the financial crisis, the customer value maximization model has emerged as one of the main constituencies of managers and organizations (Ozuem et al., 2016). This justifies that this study is focused on unethical behavior toward customers.

Unethical employees' behavior toward customers (UEBTC) as a component of unethical corporate behavior remains an important criterion variable for organizational researchers and has been deemed a major issue for many organizations (Gounariset al., 2010; Koslowski, 2000; Ozuem et al., 2016). UEBTC is defined as "the consciously controlled or unconsciously driven pro-self and pro-other behaviours of employees that are in contravention of societal moral norms" (Veetikazhiet al., 2022). UEBTC is often recognized to be a primary challenge for supervisors due to the fact that high levels can carry severe destructive ramifications—legally, financially, and reputationally (Norberg, 2015). UEBTC is a serious problem for organizations as repeated unethical behavior that can harm the work place environment and lead to reduced performance (Kaptein, 2011).

Existing literature has identified several organizational and individual predictors of UEBTC. Such antecedents include personal qualities (Moore & Gino, 2015), decision-making authority (Vardi & Weitz, 2001), organizational climate (Miao et al., 2013), as well as unethical leadership (Veetikazhi et al., 2022). Additionally, Fehr et al. (2019) and Zhang et al. (2018) demonstrated that supervisor UPB is positively associated with subordinate unethical pro-organizational behavior.

In the current study, we argue that psychopathic characteristics in leaders and more specifically psychopathic boldness also cause unethical leadership and, ultimately, UEBTC.

Prior research has examined how unethical leadership can affect UEBTC, what is missing in the literature is an understanding of how unethical leadership shapes UEBTC. The majority of studies focus on leaders engaging in unethical decisions; however, it is their effect on employees' behavior which has been fragmentally researched and needs further attention. Employees might respond in different ways to their leaders' unethicality, since some of them may reject altogether such actions, while others may even mimic them, justifying thus the proposition that leaders are influential role models in an organization (Cialdini et al., 2021). The present article tries to shed light on a specific aspect of employees' unethical actions, that is their behavior toward customers.

Social learning (SL) theory (Hobfoll, 1989) is applied here in an effort to decipher UEBTC as well as a leader's boldness which can act as a predictor and unethical leadership as a mediator. As stated by the social learning theory (SL), cognitive

and psychological processes that underlie and influence the cause and effect relations of workplace behaviors are intrinsically important (Moore & Gino, 2015). Thus, examining the UEBTC in particular, we attempt first to acquire a nuanced understanding of the psychological mechanism underlying the unethical leadership/supervision transmission process. In particular, we intend to specify the individual boundary conditions (leaders/supervisors boldness) that influence such transmission processes to their leadership in order to understand how to intervene in their employees' behavior.

To this end, the present study examines the mediating role of managers' unethical leadership as a psychological process through which manager boldness influences UEBTC.

The existing literature can be enhanced with the results of this research in various levels. It can be held that managers' psychopathic characteristics generate UEBTC. In the future, research can focus on how different supervision styles lead to numerous outcomes (Cangiano et al., 2019). Moreover, our research makes an effort to shed light on leaders/managers psychopathic characteristics, as a repeated pattern of their unethical supervision and their effect on employees' attitudes, such as UEBTC, given that future research ought to consider how supervision styles affect employee attitudes (Lee et al., 2019).

One of the important consequences of both leader's/manager's boldness and unethical leadership is UEBTC. Therefore, understanding the relation between boldness, unethical leadership, and UEBTC is important for today's organizations. With this study, we aim to analyze the employees' behaviors by identifying the mediating effect of unethical leadership on the relationship between organizational silence and turnover intention.

The study consists of three main parts. In the first section, the relationship between the leader's/manager's boldness and UEBTC, the mediating effects of unethical leadership on the relationship between UEBTC and leader's/manager's boldness are discussed in light of conceptual framework. The second part consists of methodology of the research and the discussion of the findings. In the last section, empirical findings are evaluated.

2 Literature Review and Hypotheses

2.1 Leader's/Supervisor's Psychopathic Characteristics (Boldness) and UEBTC

Cleckley (1941) captured the essence of psychopathy in "The Mask of Sanity", describing psychopaths as charming and self-centered personalities who often know of no fear or guilt. Clinical and subclinical levels of psychopathy have been examined from then on, focusing on all the distinct characteristics which it is composed of (Vergauwe et al., 2021). In order, however, to better approach the problem, research

has looked at how general personality traits are associated with it (Ruchensky & Donnellan, 2017). One of the most helpful frameworks to this end is the triarchic model of psychopathy, according to which some of its main features include boldness, meanness and disinhibition (Patrick et al., 2009). Boldness primarily deals with a sense of grandiosity and fearlessness, meanness is characterized by callousness and lack of empathy, while disinhibition has to do with irresponsible and impulsive attitudes. We focus here on boldness and its effect on unethical behavior both of leaders and employees in an organization.

Patrick et al. (2009) distinguished three sub-dimensions of psychopathy in their triarchic model. Boldness, meanness and disinhibition are its three-dimensional domains, whose measurement and assessment has offered further invaluable information on this rather perplexing concept. The notion of meanness is central to criminal psychopathy (Patrick et al., 2009). It is marked by callousness and lack of empathy. Individuals who have high levels of this aspect of psychopathy are prone to deceitful and aggressive behavior and may abuse others verbally or physically (Vergauwe et al., 2021). In the case of disinhibition, people are predisposed toward lack of planfulness and irresponsibility (Sellbom et al., 2015). Impulsivity and deficiencies in behavioral restraint are the key elements of this trait (Neo et al., 2018). Finally, boldness is the psychopathic dimension which we will be examining here in order to discover its relation to leaders' and employees' unethicality.

Boldness entails the ability to remain calm in case of threat or pressure and recover quickly from stressful events (Patrick et al., 2009). Fearlessness and high self-assurance as well as persuasiveness and thrill-seeking are usually tethered to a complex combination in a bold person's personality (Bertoldi et al., 2021). Being venturesome and socially dominant are central features in boldness and lead to imperturbable individuals who possess a social poise and bravery that may initially even be considered charming but are germane to imperviousness to punishment and diminished emotional responses, elements which most probably create problems both to someone's personal as well as professional reality (Patrick et al., 2009).

In relation to the field of work behavior, studies have estimated that as many as a few million employers and employees worldwide could be classified as experiencing some form of psychopathy (Babiak & Hare, 2006). The question remains, nevertheless, as to in which ways leadership and employee behavior can be affected by its traits. Mixed evidence exists regarding the positive and negative outcomes of a psychopathic bold (Vergauwe et al., 2021). In most studies, psychopathy in the workplace can lead to instability and unrealistic demands as well as more serious problems such as embezzlement and serious financial problems (Babiak & Hare, 2006). However, there are some aspects that can even be considered an asset for leaders and help them deal with more effectively (Landay et al., 2019). The present study focuses on its connection to unethical conduct on the part of leaders and followers and its possible repercussions on customers. Although, initially, the concept of boldness in organizations is considered as a sign of devotion, mainly, it is deliberately portrayed as storage of negative organizational issues and problems by employees (Çakıcı, 2010). It is possible to come across different surveys on the behavior of organizational silence both in national and international literature.

However, little attention is drawn by the studies on the topic of the silence behavior of the employees and its effect on turnover intention (Özdemir & Uğur, 2013). Limited research has rather focused on the relation between organizational silence and diverse workplace variables.

Moreover, considering that employees perceive their supervisor as the person who represents the employer, while at the same time is responsible to defending their psychological contract, their reaction to leader's/supervisor's boldness is expected to go beyond interpersonal conflict and aggression (Parzefall & Salin, 2010). If employees feel victims, then they are more likely to develop negative attitudes toward their organization that is regarded as, accountable for accepting these types of pressures (Coyle-Shapiro & Parzefall, 2008).

Employees may even experience feelings of "revenge" for this unfair treatment and these feelings can be justified as a response to leaders' boldness (Nielsen & Einarsen, 2012). Thus, different social exchange processes are created between the organization and its employees because of leaders' psychopathic traits. This is explained through social learning theory, according to which a party's beneficial action toward another party stimulates a feeling to positively reciprocate (Blau, 1964). However, the opposite may also happen when this norm of reciprocity is violated, so the employees' expectations are not met. Parzefall and Salin (2010) point out the employees' view of themselves as targets and their negative assessment of the quality of their employment relationship. It may even be the case that the target (employee) will attempt to harm the source (employer) as reply to this conduct (Blau, 1960; Hershcovis et al., 2007). We can understand, therefore, that several different employee attitudes are triggered by leaders' boldness.

2.2 Mediating Effect of Unethical Leadership on Boldness and UEBTC

Leaders' and employers' behaviors are part of a co-created process of communication taking place daily in organizations (Egorov et al., 2020). It cannot be denied that this is rather challenging, since personal characteristics affect how people respond to problems and dilemmas (Kish-Gephart et al., 2010). Consequently, a congruence between individual and organizational values may take place, the effects of which vary greatly and are by no means uniform across working environments (Cialdini et al., 2021). According to Zhu (2013), employee behavior includes an employee's reactive power to several environmental stimuli. When these responses and perceptions are shared, either formally or informally, by a lot of employers and employees in an organization, then a particular climate is formed (Vardi, 2001). This climate defines, through its rules, principles and codes which are shared among individuals and groups, the ethics of any given organization (Kaptein, 2008). To what extent employees will keep abiding by this workplace framework or will change aspects of their conduct on the way depends partly on their own moral identity, that is their

own moral traits, goals and standing (Aquino & Reed, 2002). When these traits and actions come in congruence with more widely accepted societal norms, unethical employee behavior may emerge (Bryant and Merritt, 2019). The first attempts to define the concept of unethical employee behavior emphasized its broad spectrum and the multiple forms which can take (Crossen, 1993). Whether it involves a particular employee or a whole group and regardless of originating at the bottom or at the top of the organizational hierarchy, it is more than common to face such behaviors in bigger or smaller organizations. This problem is costly and manifold and usually has a harmful impact on peer and observers' behavior (O'Fallon & Butterfield, 2012). Numerous factors have been identified as influencing unethical behavior, including personal characteristics (Harrison, 2018) and organizational culture (Campbell & Goritz, 2014). Moreover, its importance and severity varies and covers relations of both formal, official rules as well as more informal norms (Kaptein, 2008). Research has shown that in order to consider a behavior unethical, two distinct processes take place: one more automatic and unconscious and the other more deliberate (Gan et al., 2020). Both mechanisms are important so as to try to understand and possibly judge an employee's demeanor, whose goal might not be to bring harm, but essentially might be morally unacceptable to the majority of people (O'Reilly et al., 2016).

With the expansion of behavioral ethics research, other related terms such as unethical pro-organizational behavior (UPB) have evolved (Bryant & Merritt, 2021). Umphress and Bingham (2011) defined it as "actions that are intended to promote the effective functioning of the organization or its members and that violate core societal values, mores, laws or standards of proper conduct" (p. 622). It is a way for employees to show their attachment and support to the organization, being engaged in actions that may not be ethically accepted by the majority of people (Veetikazhi et al., 2022). The employees' relationship with their supervisor may play a cardinal role toward this end (Wang et al., 2018). Several mechanisms may be activated in this complex interaction, some of which are justified by social exchange theory which supports that employees having a high level of trust and a long-term relationship with their employers tend to develop a deeper sense of obligation toward them (Hom et al., 2009). Thus, a dilemma may emerge, according to which the interests of external subjects are harmed, whereas the interests of the organization can benefit (Kong, 2016). However, this question might take a different form because employers might not care for the collective interest but for their own, in which case confusion and vulnerability might be promoted among employees, unless they can morally identify with their leader (Miao et al., 2013). Whatever the form of unethical employee conduct, it is of the utmost importance to keep in mind that it can affect businesses, employers and peers as well as the final recipient of offered services, that is society and its members. Taking the above into consideration, an effort is made to decipher some of the reasons that may lead to such behavior toward customers and discuss possible implications.

Drawing upon social cognitive theory (Bandura, 1991), we posit that leadership processes (unethical leadership) may account for the process through which employees become willing to engage in unethical behavior toward customers as a result of leader's/supervisor's boldness. Accordingly, people are more likely to

commit unethical acts when disengaging from the moral norms and self-sanctions that ordinarily inhibit such acts.

To more clearly understand the psychological and interactional dynamics of unethical leadership, it is important to consider the significant role leaders play in the modeling process due to their credibility and status in an organization (Brown et al., 2005). Through modeling, subordinates might learn and imitate not only ethical acts but also misconduct.

Thus, when leaders/supervisors act in a deviant way, followers are likely to morally disengage toward customers so as to emulate that inappropriate conduct.

Thus, we suggest that leaders/supervisors' boldness is likely to trigger the psychological process of their unethical leadership causing *UEBTC*. In short, when subordinates perceive managers' boldness and observe their unethical leadership, they might view these acts as personally and organizationally acceptable, resulting in the activation of unethical behavior toward customers.

In line with the above, the following hypotheses are proposed for testing:

Hypothesis 1: In the dynamic context of tourism ventures, leaders/supervisors' boldness is positively related to unethical employees' behavior towards customers (*UEBTC*).

Hypothesis 2: In the dynamic context of tourism ventures, leaders/supervisors' boldness is positively related to unethical leadership.

Hypothesis 3: In the dynamic context of tourism ventures, unethical leadership is positively related to unethical employees' behavior towards customers (*UEBTC*).

Hypothesis 4: In the dynamic context of tourism ventures, unethical leadership mediates the relationship between leaders/ supervisors' boldness and unethical employees' behavior towards customers' *UEBTC*.

Theoretical model of the research is demonstrated in Fig. 1.

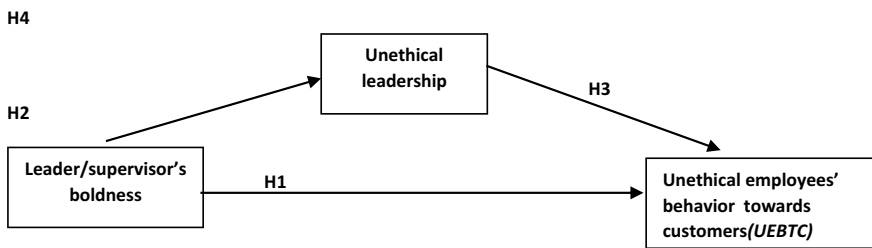


Fig. 1 Hypothesized model

3 Methodology

3.1 Sample and Data Collection

Questionnaires were distributed to managers working in the Greek hotel sector either in a printed form or via e-mail. Of the 483 managers in the target population, 179 managers responded from 59 different companies, which corresponds to an overall response rate of 37%.

Most of the participants were males (53.9%), while responses from female participants accounted for 46.1%. The majority of the respondents belonged to the 30–39 year age group (42%). 67.3% of the participants were married, whereas 32.7% were single. 38% of the respondents had a postgraduate degree. Finally, 32% of managers had less than five years of work experience with the organization they currently worked for.

3.2 Measurements

Boldness of managers was measured using a Psychopathic Personality Inventory-Revised scale (PPI) developed by Lilienfeld and Widows (2005). The PPI is comprised of 54 items. Unethical leadership was measured with a 28-item scale which was adopted by Bennett and Robinson (2000).

Unethical employee behavior toward customers was measured with an 8-item scale, which was adopted from Kaptein (2008). Responses were obtained using 5-point Likert-type scale where (1) represents “strongly agree” and (5) represents “strongly disagree”.

3.3 Data Analysis and Findings

In Table 1, the mean, standard deviations (SD), correlation values and Cronbach’s alphas are presented. The direction of the correlation coefficients was as expected in relation to our research hypotheses. Results reveal that leaders/supervisors’ boldness has a positive and significant relationship with *UEBTC* ($r = 0.310^{**}$, $p < 0.01$); unethical leadership ($r = 0.271^{**}$, $p < 0.01$) and unethical leadership with *UEBTC* ($r = 0.183^{**}$, $p < 0.01$).

Measurement Validation

Fornell and Larcker’s (1981) validity assessment criterion is used here so as to regulate instrument validity by conducting The Confirmatory Factor Analysis (CFA). In Table 2, a full five factor measurement model shows a reasonably goodfit, as Chi-square = 470.5, Tucker–Lewis Index (TLI) = 0.92, Incremental Fit Index (IFI) =

Table 1 Mean, standard deviations, correlations and reliabilities

<i>Correlations</i>												
Variables	mean	SD	1	2	3	4	5	6	7	8	9	10
Gender	1.48	0.46	–									
Marital status	1.69	0.47	–0.091									
Age	37.49	4.45	–0.142**	0.543**								
Education	19.41	1.97	–0.122*	0.162**	0.269**							
<i>Organizational</i>												
Tenure	5.79	4.78	–0.007	0.389**	0.715**	0.161**						
Experience	9.57	6.77	–0.115*	0.409**	0.912**	0.206**	0.801**					
Boldness	2.84	0.88	0.034	–0.026	0.005	–0.019	0.019	–0.018	0.66			
<i>Unethical</i>												
Leadership	2.16	0.80	–0.081	0.075	0.066	0.307**	0.026	0.053	0.271**	0.82		
UEBTC	3.09	1.15	0.114*	–0.120*	–0.026	–0.205**	–0.051	–0.040	0.310**	0.183**	0.123*	0.87

Note: n = 179. Cronbach's alphas are shown in parentheses on the diagonal

** Correlation is significant at the 0.01 level (2-tailed)

* Correlation is significant at the 0.05 level (2-tailed)

0.93, Confirmatory Fit Index (CFI) = 0.93, Adjusted Goodness of Fit Index (AGFI) = 0.89, Root Mean Square Error of Approximation (RMSEA) = 0.04, Standardized Root Mean Square Residual (SRMR) = 0.04. All of the indices above are found within the suitable limits. The results determine that leaders'/supervisors' boldness, unethical leadership and *UEBTC* are distinct constructs.

Table 2 Fit statistics from measurement model comparison

Models	χ^2	df	χ^2/df	TLI	IFI	CFI	AGFI	SRMR	RMSEA	AIC
Full Measurement Model	172.498	1.90	970.970	0.95	0.930	0.04	0.052	54.9		
(a) Model	359.81	1023.60	85	0.890	0.890	0.870	0.080	0.943	1.1	
(a) Model	351.11	1023.50	87	0.890	0.880	0.090	0.084	15.9		
(a) Model	489.0	1025.10	770.800	0.78	0.770	0.070	0.10	578.0		
(a) Model	1143.0	10,211.40	390.52	0.490	0.570	0.160	0.151	224.0		

Note n = 179, *** p < 0.001, All models are compared to the full measurement model

(a) Boldness and unethical leadership taken as one factor.

(b) Boldness and *UEBTC* taken as one factor.

(c) Unethical leadership and *UEBTC* as one factor, boldness taken as one factor.

(d) All constructs taken as one factor.

χ^2 = chi-square; df = degrees of freedom; TLI = Tucker-Lewis Index; IFI = Incremental Fit Index; CFI = Comparative Fit Index; AGFI = Adjusted Goodness of Fit Index; RMSEA = Root Mean Square Error of Approximation; SRMR = Standardized Root Mean Square Residual

Tables 3 and 4 present the collected data. As it can be shown, factor loadings for all variables were greater than 0.60. Moreover, all variables have CR and Cronbach's alpha greater than 0.70 and 0.60, respectively, so convergent validity is achieved.

The discriminant validity is acquired through the square root of AVE of all constructs, which must be greater than the correlations of the remaining constructs (Fornell & Larcker, 1981). The results are presented as square root of AVE of leaders'/supervisors' boldness (0.64), unethical leadership (0.70), UEBTC (0.84), so discriminant validity is supported.

Hypotheses Testing

Tests of Mediation

Table 3 Composite reliability (CR), Cronbach alpha and factor loadings

Variables	Cronbach alpha	Composite	No. of reliability	Factor loadings items
Boldness	0.70	0.66	54	1.00, 0.80, 0.87, 0.82, 0.88, 0.98, 0.91 0.76, 0.79, 0.82, 0.91, 0.79, 0.91, 0.91 0.86, 0.78, 0.80, 0.88, 0.97, 0.91, 0.91 0.88, 0.76, 0.88, 0.98, 0.79, 0.82, 0.80 0.64, 0.80, 0.92, 0.91, 0.88, 0.82, 0.96 0.91, 0.79, 0.86, 0.89, 0.76, 0.91, 0.80 0.96, 0.89, 0.82, 0.79, 0.82, 0.87, 0.98 0.87, 0.91, 0.82, 0.87, 0.98
<i>Unethical</i>				
Leadership	0.82	0.82	28	1.00, 0.90, 0.98, 0.86, 0.91, 0.79, 0.87 0.80, 0.67, 0.92, 0.86, 0.88, 0.91, 0.88 0.98, 0.79, 0.91, 0.96, 0.79, 0.86, 0.82
UEBTC	0.87	0.87	8	1.00, 0.80, 0.87

Table 4 Discriminant validity

Constructs	1	2	3
1. Leaders'/supervisors' boldness			
2. Unethical leadership	0.36***		
3. UEBTC	0.39***	0.22***	

Note *** denotes a significance level of 0.001

This study examined if the effect of leaders/supervisors' boldness on employee's unethical behavior toward customers can be explained through unethical leadership. The SPSS Process Macro outcomes (Preacher et al., 2007) (Table 5) show us that the total effect of leaders'/supervisors' boldness on employee's unethical behavior toward customers was positive and significant ($\beta = 0.40, t = 6.74, p < 0.00$), so Hypothesis 1 is supported. In relation to Hypothesis 2, leaders'/supervisors' boldness positively impacted unethical leadership and the significant unstandardized regression coefficient ($\beta = 0.26, t = 5.63, p < 0.00$) provides the necessary evidence.

Further, the relation between unethical leadership and employee's unethical behavior toward customers was positive and significant when controlling for leaders'/supervisors' boldness ($\beta = 0.30, t = 4.50, p < 0.00$). In addition, leaders'/supervisors' boldness has a positive influence on employee's unethical behavior toward customers when controlling for unethical leadership ($\beta = 0.32, t = 5.30, p < 0.00$). Thus, Hypothesis 3 and Hypothesis 4 are supported too. The Sobel test (Sobel, 1982) was used to calculate the results of this mediation model. The two-tailed test (if a normal distribution is assumed) indicates that the (unstandardized) indirect effect (0.08) is significant with Sobelz = 3.48, $p < 0.00$, supporting in this way Hypothesis 4.

Table 5 Results of simple mediation model regressing workplace mobbing as a mediator

Direct effect model				
Outcome = M (unethical leadership)				
Predictor	B	SE	T	p
X (Leader/supervisor's boldness) A	0.28	0.04	5.81	0.00
Constant i1	- 0.52	0.53	- 1.21	0.23
Direct effect model				
Predictor outcome = Y (UEBTC)				
X (Leader/supervisor's boldness) c'	0.340	0.075	420.00	
M (Unethical leadership) B	0.310	0.084	660.00	
Constant i2	3.60	0.61	5.89	0.00
Total effect model				
Predictor outcome = Y (UEBTC)				
X (Leader/supervisor's boldness) C	0.43	0.06	6.77	0.00
Constant i3	3.44	0.61	5.61	0.00
Indirect effect and significance using the normal distribution				
Sobel value SE LL 90% CI UL 90% CI Z P				
0.090.02 0.060.143.680.00				
Bootstrap results for indirect effect of X on Y				
Effect M SE LL 90% CI UL 90% CI				
0.090.02 0.05 0.14				

Note n = 179; β = Unstandardized Regression Coefficient; SE = Standard Error; Bootstrap Sample Size = 5000; LL = Lower Limit; CI = Confidence Interval; UL = Upper Limit

4 Discussion

Although there exists extensive managers' boldness in many organizations and unethical leadership has detrimental effect on organizations, there exists insufficient research on this topic. In addition, in recent years, concerns for unethical leadership increased among public institutions, non-governmental organizations and academic researchers (Pierce & Aguinis, 2013). Moreover, it is vital to examine how social contexts—and in particular surrounding individuals—can impact employees' willingness to engage in unethical behavior. Moreover, the particular social influence processes that we have studied here involve downward influence patterns within organizations (i.e., the social influence of leaders).

Leadership is a central and vital force within organizations; thus, the idea that managers influence the willingness of employees to involve themselves to unethical behavior toward customers a contribution to unethical leadership literature. The findings of this study are path breaking relative to our ability to understand how and why unethical behaviors occur in organizations and stakeholders. Our findings elucidate the underlying processes through which psychopathic traits spread unethical attitudes from managers to employees. Understanding the mediating role of unethical leadership advances our understanding of the employee psychological processes through which managers achieve their influence.

Overall, employee engagement in unethical behavior toward customers not only violates ethical and societal norms, but can also lead to destructive consequences for organizations in the long run (Umphress & Bingham, 2011). For this reason, it is essential for organizations to be aware of poor leadership (unethical leadership) and proactively respond to employees' behavior toward customers.

Since leaders'/supervisors' boldness comprises individuals' expression of their thoughts, opinions and suggestions leading disruptions in an organization, executives have to search for ways to deal with this behavior. In this respect, top level managers need to provide downward communication and encourage it within the organization. Otherwise, the employees will lose their ethical identity and will use unethical behavior toward customers. The culture created by the top management will need to contribute to the productivity of employees. Because unethical leadership has detrimental consequences on employees' unethical behavior toward customers, this phenomenon should be addressed. Gond et al. (2011) argued for HRM's pivotal role in promoting ethical leadership, and Manroop et al. (2014) underscored human resource systems' important role in influencing ethical climates by "articulating and reinforcing the values and behaviors the organization desires from employees" (p. 798). Moreover, organizations that tolerate unethical leadership actually reinforce it. On the contrary, organizations dealing proactively with unethical leadership create a positive and safe climate for employees, decreasing bad behavior toward customers and enhancing psychological wellbeing (van Dyk, 2016).

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Women's Tourism Entrepreneurship: Digital Approach and E-Skills in Travel Business Marketing



Marianna Kapota, Ioanna Giannoukou, and Constantinos Halkiopoulos

Abstract Women's entrepreneurship in the tourism industry is emerging as a significant force, necessitating an understanding of the factors influencing the success of women-owned businesses. In the field of tourism, digital presence, and skills in technology (e-skills) are gaining increasing importance, impacting enterprises' promotional and communication capabilities. In the context of this research, we focus on women's entrepreneurship in the tourism industry, emphasizing marketing and the use of digital tools. We explore the correlation between using e-skills and developing women-owned businesses in the tourism sector. Additionally, we examine the role of digital marketing and technological tools in promoting and enhancing the visibility of women-led travel agencies. Through the collection and analysis of research studies and business cases, we highlight the importance of digital presence and e-skills in empowering women's entrepreneurship and fostering the development of the tourism sector. The results of this research will provide comprehensive guidelines for strengthening women's entrepreneurship in the tourism industry and developing effective marketing strategies, emphasizing digital presence and the utilization of technological tools for travel agencies.

Keywords Women entrepreneurship · Digital marketing · Tourism · e-skills · Leadership · Travel agencies

JEL Classifications L2 · Z32 · Z33 · M31 · O32 · O33 · L86

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1 Introduction

The contribution of women in entrepreneurship within the tourism sector is of paramount importance in advancing economic empowerment, fostering sustainable development, and promoting gender equality (Avcı & Gümüş, 2022). Considering the expanding tourism industry, it is imperative to get insight into the distinct obstacles and prospects encountered by female entrepreneurs operating within this domain (Butkouskaya et al., 2020). This introductory section aims to present a comprehensive overview of women's involvement in tourism entrepreneurship, emphasizing the utilization of digital strategies and e-skills in marketing travel businesses (Halkiopoulos & Giotopoulos, 2022). The domain of women's tourism entrepreneurship pertains to the initiation and administration of enterprises by women throughout many segments of the tourist sector, encompassing areas such as lodging, food and beverage services, travel agencies, and tour operating companies (Avcı & Gümüş, 2022). According to Avcı and Gümüş (2022), female entrepreneurs provide significant contributions to the creation of employment opportunities, the development of communities, and the preservation of cultural heritage.

Nevertheless, individuals in this group frequently encounter distinct obstacles, including restricted financial resources, gender-based prejudices, and societal norms (Butkouskaya et al., 2020). The significance of digital strategies and e-skills in marketing travel businesses has witnessed a notable rise in recent years (Figuroa-Domecq et al., 2020a, 2020b, 2020c). The utilization of technology and the broad adoption of the internet have significantly altered tourism organizations' operational and marketing strategies (Figuroa-Domecq et al., 2020a, 2020b, 2020c). According to Figuroa-Domecq et al. (2020a, 2020b, 2020c), female entrepreneurs who possess digital abilities and use digital platforms can successfully connect with and captivate their intended audience, boost customer experiences, and enhance overall business performance (Halkiopoulos & Koumparelis, 2020). Utilizing digital technologies, including social media, websites, and online booking platforms, is a crucial strategy in marketing within the travel industry (Halkiopoulos & Papadopoulos, 2022). This method promotes tourism products, establishes client connections, and expedites transactions (Gkintoni et al., 2024; Gutierrez & Vafadari, 2022; Pitrang & Pahlevi, 2023). According to Gutierrez and Vafadari (2022), women entrepreneurs must possess e-skills, encompassing digital marketing, data analytics, and online communication, to employ these digital tools and techniques proficiently (Antonopoulou et al., 2020, Gkintoni et al., 2022). Scholarly investigations have been conducted in the field of women's tourism entrepreneurship, encompassing diverse facets such as the drivers behind women entrepreneurs, the influence of responsible tourism on women's economic empowerment, and the gendered ramifications of governmental policies on women within the tourism sector (Avcı & Gümüş, 2022; Sanuja & Joseph, 2022; Seyfi et al., 2020).

The main objective of this study is to investigate the relationship between the adoption of electronic skills (e-skills) and the expansion of women-owned enterprises within the tourism industry. Our research focuses on examining the impact of

implementing digital marketing tactics and utilizing technical tools on the empowerment of women entrepreneurs and the promotion of women-led travel firms. Through thoroughly examining extant research papers and analyzing successful business cases, this study elucidates the pivotal significance of digital presence and e-skills in advancing women's entrepreneurship within the tourist sector (Halkiopoulos et al., 2021a). Furthermore, our objective is to offer pragmatic recommendations and efficient marketing tactics for travel businesses managed by women, with a particular focus on the use of digital tools (Antonopoulou et al., 2022) and online platforms (Halkiopoulos et al., 2020). The forthcoming portions of this study will examine the present condition of women's entrepreneurship within the tourist industry, the importance of electronic skills and digital marketing, and how these factors contribute to the achievements of travel businesses owned by women (Antonopoulou et al., 2021a, 2021b). The outcomes and discoveries of this research endeavor aim to be a significant asset for policymakers, industry participants, and women entrepreneurs who strive to promote a more inclusive and profitable tourist environment.

2 Literature Review

In recent years, an increasing amount of scholarly inquiry has focused on women's entrepreneurship, with a specific emphasis on its manifestation within the tourism industry. Academic scholars have acknowledged the growing significance of comprehending the determinants that impact the prosperity of women-owned enterprises in this industry. The significance of digital presence and e-skills in developing promotional and communication capacities in the tourism industry has garnered considerable attention as a critical factor. Research examining the influence of digital technology on enterprises has underscored the profound consequences of integrating electronic competencies into marketing tactics (Theodorakopoulos et al., 2023). The tourism industry, which heavily depends on efficient marketing and promotion strategies, has experienced a significant transition toward utilizing digital tools to attract and engage tourists and customers (Heliades et al., 2017; Panas et al., 2017). Digital marketing has become a potent method for reaching a worldwide audience and improving brand visibility through diverse internet platforms and tactics. The existing body of research indicates that women's engagement in entrepreneurial activities within the tourism sector is positively impacted by their proficiency in electronic skills (Halkiopoulos et al., 2023a). Female entrepreneurs who possess a profound comprehension of digital technologies and exhibit proficiency in their use within their enterprises often encounter remarkable achievements and expansion (Minniti & Naudé, 2010). This underscores the need to offer women-led travel companies opportunities to acquire tools and training to cultivate electronic capabilities (Halkiopoulos et al., 2021b; Mohammad & Ebrahim, 2022).

Additionally, using digital marketing tactics and technical tools has been found to play a crucial role in promoting and empowering women's entrepreneurship within the tourism industry. Women-led travel businesses that have achieved success have

efficiently utilized various digital channels such as social media, search engine optimization (SEO), and email marketing to target their desired customer base effectively (Halkiopoulos et al., 2023b). These endeavors have resulted in enhanced market positioning and heightened customer involvement. The capacity to boost visibility through digital platforms is seen as a vital component that significantly impacts the success of travel firms operated by women. The utilization of digital platforms has facilitated these enterprises in expanding their reach to a broader demographic, accessing specialized markets, and establishing connections with prospective clientele across various geographical regions (Katsoni & Dologlou, 2017; Solakis et al., 2022).

Moreover, using digital marketing analytics has effectively enabled the practice of making decisions based on data, empowering female entrepreneurs to optimize their marketing strategies to achieve superior outcomes (Katsoni et al., 2012). The current state of academic study on women's entrepreneurship in the tourism industry and the importance of e-skills and digital marketing indicates a notable expansion. However, it is crucial to acknowledge that certain areas remain unexplored and require further attention (Sarigiannidis et al., 2021). Additional research is required to investigate the obstacles encountered by female entrepreneurs in properly embracing and utilizing digital tools (Panas et al., 2020). Furthermore, further investigation might explore the electronic abilities essential for success in the tourism industry (Panteli et al., 2021).

In summary, the existing body of literature demonstrates a robust association between electronic skills, digital marketing, and the attainment of favorable outcomes for women-owned enterprises operating within the tourism sector. The utilization of digital tools and the development of electronic abilities have become significant catalysts for the advancement and empowerment of women entrepreneurs in this industry. Through the comprehension and use of digital technology, travel companies run by women can establish a strong foundation for enduring prosperity within a fiercely competitive and swiftly changing tourism environment. The forthcoming sections of this study will undertake a more in-depth analysis of the present condition of women's entrepreneurship within the tourism sector. It will also explore the importance of e-skills and digital marketing (Gkintoni et al., 2023b) while providing comprehensive recommendations for enhancing women's entrepreneurship and formulating efficacious marketing strategies within travel agencies (Halkiopoulos et al., 2022).

2.1 Fields of Women Entrepreneurship

One crucial strategy for fostering economic growth at the national level involves promoting and supporting female entrepreneurs, a trend that has shown notable progress in recent times. The phenomenon of women's entrepreneurship addresses the requirement for a harmonious integration and equilibrium between various roles, allowing for greater adaptability in managing both spatial and temporal aspects in connection to familial responsibilities and duties. The factors mentioned above

elucidate the heightened necessity for entrepreneurship among individuals of both genders. The primary drivers behind the initiation of female business are unemployment and economic factors. In Greece, women tend to select entrepreneurial careers as an alternative or new professional pursuit more methodically, irrespective of their underlying motivations (Akay, 2022).

The sectors that predominantly attract female entrepreneurs are the tertiary sector, encompassing service provision and retail trade. The importance of women in the agriculture industry has been notably emphasized. A significant population of entrepreneurs is engaged in cooperative groups, encompassing several sectors like agro-tourism (Panas et al., 2022), manufacturing, and selling cultural heritage products, among others (Katsoni & Stratigea, 2016). Nevertheless, there has been a notable emergence of women entrepreneurs actively engaged in burgeoning industries, primarily offering services in sectors such as travel advertising agencies and the real estate market.

Numerous European and national investment initiatives have been formulated to bolster, promote, and foster female entrepreneurship. The increasing consolidation and advancement of female entrepreneurship has resulted in a more prominent and engaged position for women in several spheres, including social, economic, and political domains (Antonopoulou et al., 2022). Therefore, women's endeavors in entrepreneurship aim to tackle the primary issue of unemployment, albeit encountering challenges in their integration into the market (Noor et al., 2022; Theodorakopoulos et al., 2022).

The European Commission (2002) highlights that a significant challenge in the business world and labor market is the under-representation of women, which contributes significantly to the unemployment rate. This issue stems from the pervasive influence of gender stereotypes, which extend beyond considerations of functionality and entrepreneurship policy.

The role of gender in society and the presence of constraints across all domains of human activity serve as influential factors and barriers to the advancement of female entrepreneurship. The perpetuation of gender-based preconceptions regarding occupational roles for men and women serves as a fundamental basis for the emergence of additional barriers and the persistence of resistance when establishing a business and fulfilling everyday familial responsibilities. These prejudices harm women entrepreneurs and may serve as a deterrent for women in their pursuit of business ventures. Through additional research, it becomes evident that women's entrepreneurship is impacted by many external and internal elements that contribute to the emergence of distinct circumstances in each successive age.

The following factors are enumerated below:

- The potential avenues available to women for enhancing and advancing their businesses, such as networking, training, thorough research, and other related activities, are influenced by familial responsibilities.
- The absence of role models in the business sector, stemming from the entrepreneurial attitude, reinforces traditional business patterns arising from self-employment, hence enhancing corporate efficiency.

- The presence of poor self-confidence among women plays a significant role in bolstering the field of entrepreneurship. The rationale behind the decision to establish and oversee a corporation stems from the inherent ambiguity surrounding the level of achievement or potential failure associated with such an undertaking.
- The presence of family obligations compels women to seek employment in industries that offer lower wages and discourage the accumulation of substantial financial resources.
- Women exhibit limited familiarity with contemporary management and production techniques, indicating a cognitive deficit unrelated to their educational background and hindering their progress.

The criteria outlined by the Organization for Economic Co-operation and Development (OECD) in 2005 delineate the classification of a business as “women-owned.” The minimum requirement for female participation in a business’s capital ownership is 51%. The proprietor personally assumes responsibility for formulating strategic decisions about her enterprise’s advancement and enduring viability. These two conditions make it easier to maintain accurate documentation of women-owned businesses. This is primarily due to the prevalence of family-owned enterprises, wherein women are often designated as the primary shareholders. However, this arrangement may not necessarily reflect the true extent of their involvement, as it may be primarily for tax-related purposes. Consequently, the actual direction and management of these businesses are typically overseen by men, compromising the reliability of attributing ownership solely to women. The proportion of women between 18 and 64 initiating commercial activities constitutes 4.3% of the total female population.

In contrast, this group’s corresponding percentage for men is 8.6%. The primary objective of the European Union portal for women’s entrepreneurship is to facilitate access to online resources, including programs, organizations, and representative events specifically designed and implemented by women to foster and enhance solidarity among women in business. The Center for Research on Gender Equality and Female Entrepreneurship in Greece focuses on conducting social studies about gender equality. Its primary objectives include providing information on social inclusion and entrepreneurship and facilitating women’s integration into the labor market. Moreover, it is worth noting that women-owned firms have a remarkable growth rate, surpassing that of other business types on a global scale. This phenomenon holds particular significance as it contributes substantially to economic sectors characterized by innovation, employability, and creativity.

Entrepreneurship serves as a foundation for recognizing the necessity of redefining its three fundamental components to accommodate women’s entrepreneurship’s distinctiveness. Further examination of the theoretical and conceptual underpinnings of entrepreneurship necessitates the inclusion of two nascent domains that have recently surfaced within the realm of women’s entrepreneurship. Indeed, the two entities under consideration are none other than the concept of motherhood and the broader environmental context, sometimes referred to as the “medium” or “macro” environment. Specific characteristics, such as societal expectations and cultural standards, are documented within the medium and macro environment (Mametja, 2021).

One notable aspect pertains to female entrepreneurs' visibility and activities as documented in the media. Furthermore, the "macro" environment encompasses national strategic, political, cultural, and economic effects, while the "medium" environment pertains to regional support services, organizational actions, and industries (Brush et al., 2009).

2.2 Traits of Women Entrepreneurs and Their Companies

Numerous empirical investigations have demonstrated that women's entrepreneurship has predominantly relied on analogous conceptual frameworks derived from studies conducted on male-led enterprises, owing to a relative need for more comprehensive research in this domain. The growing population of female entrepreneurs is a compelling impetus for scholarly investigation of the similarities and differences in their qualities, behaviors, and experiences compared to their male counterparts. Based on the existing information and scholarly research, it can be observed that female entrepreneurs share certain personality traits, risk-taking tendencies, and psychological characteristics with their male counterparts (Giannoukou et al., 2022; Gkinton et al., 2023a, 2023b). However, it is worth noting that there are some distinctions between the two groups. Specifically, female entrepreneurs tend to make decisions that involve greater risk while also exhibiting lower energy levels.

It is noteworthy that empirical research demonstrates a tendency among male entrepreneurs to exhibit a lower propensity for risk assessment compared to their female counterparts. Moreover, male entrepreneurs are more inclined to embrace risk-taking behaviors within the context of their commercial ventures. Hence, this elucidates the inclination of women to make more conservative economic decisions, as well as decisions in other domains. Moreover, it is an established reality that financial institutions, including banks, tend to undervalue and exhibit gender bias against women entrepreneurs, perceiving them as less capable of accurately assessing risks.

The selection of a woman's business endeavor is a common occurrence. The decision is predicated upon prior professional expertise (Ramkissoon & Mavondo, 2023). It seeks to mitigate the potential risks associated with embarking on a novel enterprise, which could conceivably be pursued within an alternative domain of operation. Furthermore, most female entrepreneurs seek support from their family and close acquaintances in the early phase of establishing a business. As previously discussed, this behavior reflects both a decreased inclination toward risk-taking and a preference for assistance from trusted sources with proven reliability. According to statistical data, female entrepreneurs frequently maintain their firms stable for an extended duration without actively pursuing rapid expansion in their new ventures. Research findings indicate that the observed phenomenon can be attributed to the desire for increased experience among certain women, who may doubt their capacity to manage a quickly expanding enterprise effectively. Consequently, these doubts may impede the growth trajectory of their firms.

A separate study showed that women exhibit distinct approaches to managing individual pieces of information. This viewpoint suggests that women are more inclined than men to allocate increased attention toward various aspects of information, hence engaging in more comprehensive management and processing of said information. Women possess a more expansive and inclusive perspective, enabling them to make optimal decisions due to their distinct evaluation of potential mistakes and lack of apprehension about increased risk.

It is essential to acknowledge that distinctive features of male and female entrepreneurs are distinguished by professional experience and education (Dewnarain & Gungah, 2023). In contrast, empirical research indicates that female entrepreneurs possess prior work experience in education, sales, secretarial support, or office administration. In contrast, their male counterparts typically have managerial, scientific, engineering, or technical backgrounds. According to a study conducted by Brush, it is observed that women generally do not have consistent jobs, and their duration of self-employment is comparatively shorter than that of men.

Previous research has indicated no notable difference in overall business management skills between male and female business owners. However, female entrepreneurs tend to emphasize interpersonal and social skills more, considering these as their most valuable assets (Cheng & Law, 2023).

The primary motivation behind women's decision to initiate their business ventures is distinguishing themselves from others. The determinant influencing their decision-making process is their personal and familial circumstances (Gian-noukou et al., 2023). Individuals embark on their entrepreneurial journey to achieve equilibrium in their lives. By pursuing business ventures, they seek to attain flexibility in various aspects. Conversely, men initiate their entrepreneurial endeavors to avoid hierarchical superiors, operate independently, and realize their aspirations of becoming successful business professionals. The emotional disposition of women is often associated with their approach to entrepreneurship, wherein they perceive it as a vehicle for providing support and assistance to their immediate family and the broader society (Setiawan, 2023).

It is noteworthy that alongside the disparities in the attributes of males and females, analogous distinctions arise in the management practices of organizations. Women-owned enterprises are operated with a feminist perspective, incorporating principles of inclusivity. Consequently, variations exist in the manner in which firms are targeted. Undoubtedly, the primary objective in most business endeavors is financial gain. Nevertheless, it is essential to note that motivations beyond mere wealth accumulation drive women entrepreneurs. Brush posits that the objectives of female entrepreneurs frequently revolve around social considerations, with customer pleasure being a prominent goal among them.

According to Brindley, women tend to prefer a slower tempo of action than men in corporate expansion and development. The completion of tasks is not solely attributed to risk aversion, as previously stated, but also to the human-centric disposition of women. According to Brindley, organizations prioritize the sustainability and safety of their employees, as well as maintaining a healthy work-life balance, while making business decisions.

The existing body of literature utilizes a comparative approach to examine the entrepreneurial activity of women and men, aiming to discern the distinctive attributes of women's enterprises and women entrepreneurs. In a study conducted by Brindley, a comparison is made between the demographic, personality, and entrepreneurial traits of individuals belonging to different genders. According to researcher, traditional male gender roles are manifested in entrepreneurial endeavors, characterized by traits such as autonomy, ambition, propensity for risk-taking, self-assurance, and efficient decision-making.

3 Research Design—Methods

3.1 Purpose of the Research

This study aims to provide a comprehensive review of papers and studies about the relationship between Women's Tourism Entrepreneurship, with a specific emphasis on the Digital Approach and E-Skills in Travel Business Marketing. In order to accomplish this, a thorough examination of metadata about literature sources pertinent to the digital domain will be undertaken. This study aims to conduct a literature review on the impact of digital techniques and the use of e-skills in marketing travel enterprises on women's entrepreneurship in the tourist industry.

The PRISMA analytical framework informed the research approach for this systematic metadata review, which was employed to guide the study. This process aims to provide insights into the importance of digital presence and e-skills in empowering women entrepreneurs and improving the visibility of women-led travel agencies. The scope of the review was limited to worldwide literature published within the timeframe of 2020 to 2023. In order to achieve a broad scope, the search was conducted using credible data sources, namely Scopus and ORCID, which are recognized for their extensive coverage of scholarly literature. The researchers meticulously established the inclusion criteria, focusing on studies that precisely examined the complex interplay between women's entrepreneurship and marketing within the tourism industry.

A rigorous screening was conducted to identify and extract the most pertinent articles. In the initial search, a thorough list of keywords, including “Women’s entrepreneurship,” “digital marketing,” “tourism,” “e-skills,” and “travel agencies,” was found and employed as a primary step. The ensuing procedure was indexing the works in well-regarded research databases, specifically Scopus and ORCID, to obtain a comprehensive set of 119 search results using different combinations of keywords.

In order to proceed with the second step (Step = 2), a comprehensive evaluation of the title and abstract of each article was necessary as per the established inclusion criteria. As a result, 58 articles were identified that satisfied the predetermined criteria, making them eligible for subsequent study.

During the third stage (stage = 3), 33 studies were removed from the analysis due to their inaccessibility or difficulty obtaining full-text articles. Furthermore, six studies that were not written in English were excluded from the analysis due to limitations in language capabilities, thereby enhancing the precision of the selection procedure.

The 19 works that met the predetermined criteria ($N = 19$) were evaluated comprehensively in the fourth stage (Step = 4). As a result, six research publications were removed from the analysis due to inadequate research data, guaranteeing the inclusion of just the most pertinent and rigorous investigations.

The systematic review utilized a meticulous and all-encompassing methodology to locate and assess the literature on women’s entrepreneurship and marketing within the tourism industry. The study’s primary topics are the implications of women’s entrepreneurship for marketing tactics in the tourism industry. This study aims to provide valuable contributions to understanding the dynamic and ever-changing field of women’s entrepreneurship in the context of digital marketing in the tourism industry.

Similarly, the studies incorporated in this systematic metadata review did not establish direct correlations between Women’s Tourism Entrepreneurship, Digital Approach, and E-Skills in Travel Business Marketing. Consequently, the implications were excluded from the research group based on the “Data Quality Score” in the flowchart—a rigorous evaluation of the selected papers identified the study’s primary themes. The themes about the domains of Women’s Tourism Entrepreneurship, Digital Marketing, and E-Skills in Travel Business Marketing were incorporated into the analysis, provided other relevant studies corroborated them.

The literature search from 2020 to 2023 extensively focused on worldwide sources. Reputable data sources, including Scopus and ORCID, were leveraged to ensure the inclusion of relevant publications in the collection. The search was conducted based on the terms “Women’s entrepreneurship,” “digital marketing,” “tourism,” “e-skills,” and “travel agencies.” Simultaneously, the inclusion criteria were centered around research that particularly examined the correlation between women’s entrepreneurship and marketing in the tourism industry context. The review only included studies completed within the designated period and had practical significance for research or conceptual debates about the given keywords.

The initial data collection stage encompassed the discovery of pertinent keywords, which were subsequently utilized to index papers inside esteemed research resources. The original search produced 119 search results, which were obtained using the specified keywords. Following a systematic process, the titles and abstracts of every article were thoroughly examined, identifying 58 publications that satisfied the predetermined criteria for inclusion. In the subsequent phase, 33 full-text papers that were either inaccessible or difficult to acquire were eliminated from the analysis. In addition, studies that were not written in English were excluded ($N = 6$) due to limitations in linguistic capabilities, enhancing the selection procedure's precision. The 19 works that met the predetermined criteria ($N = 19$) were subjected to a thorough evaluation to ascertain the inclusion of pertinent and rigorous studies.

The primary focus of the study was on three key areas: Women's Tourism Entrepreneurship, Digital Marketing, and E-Skills in Travel Business Marketing. A thorough assessment of the chosen papers determined these themes. Themes were incorporated into the review if they were supported by several research, demonstrating their importance and pertinence within the review context (Table 1). This study aims to provide significant contributions to the field of women's entrepreneurship, digital marketing strategies, and the use of e-skills in the marketing of travel businesses. This research seeks to enhance our comprehension of how these factors interact and influence the changing landscape of the tourism industry.

4 Results

The findings of the current systematic research (Table 1) shed light on significant aspects of women's entrepreneurship concerning stereotypes. In a scholarly investigation conducted by Gumba (2020), the focus was on analyzing the entrepreneurial activities undertaken by women in two specific tourism regions within the Philippines. The study revealed that women-led firms significantly relied on the tourism sector while encountering competition from large-scale capitalists. The research additionally revealed that the firms exhibited minimal and inconsequential effects on employment creation, whereas women encountered challenges related to gender. This study investigates the behaviors shown by women entrepreneurs and the results associated with entrepreneurship development, specifically focusing on the effects of a decade-long regional program implemented in China. The significance of intellectual assistance was unveiled, and a theoretical framework was put out to elucidate the interactive and cooperative nature of the learning process between the personnel of the development agency and entrepreneurs. According to Rao et al. (2022), collaborative action learning has proven beneficial for women entrepreneurs in overcoming obstacles, enhancing their entrepreneurial skills, and attaining self-reliance.

Table 1 Research papers of systematic analysis (PRISMA methodology)

Authors	Abstract summary	Participants	Main findings	Study design
Gumba (2020)	Women's enterprises in Tigoa were highly dependent on tourism		<ul style="list-style-type: none"> • Women in both Tigoa and Caramoan expressed a sense of pride in receiving outsiders as visitors of their home community • Women's enterprises in both areas were highly dependent on tourism, but those in Caramoan were more enterprising and resilient • Women's engagements were isolated from the mainstream of the tourism industry and their businesses were struggling amidst strong competition from big capitalists 	Observational
Rao et al. (2022)	Collaborative action learning drives women entrepreneurs to overcome barriers in practice		<ul style="list-style-type: none"> • The 10-year regional program in China improved women's entrepreneurship in rural tourism • Intellectual support from the development agency was essential for the success of the program • A dynamic collaborative learning process between the development agency and entrepreneurs was established, which enabled women entrepreneurs to overcome barriers and achieve independence 	Observational

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Tovmasyan (2022)	Women have many problems with starting a business in tourism in Armenia		<ul style="list-style-type: none"> • Women face many problems when starting a business in tourism in Armenia, such as lack of finance, knowledge, and skills in management, marketing, and business organization • The survey results indicate that women have difficulties in business development, doing innovations, marketing, and attracting tourists • Women rate their skills level at a medium-rare, and the majority want to improve their skills for doing business, marketing, communication, analytical, decision-making, and other skills 	Survey
Ribeiro et al. (2021)	Strong ties with government agencies lead to more resource acquisition among women-owned tourism businesses	556	<ul style="list-style-type: none"> • Entrepreneurship orientation positively influences firms' social ties, resource acquisition, and performance • Establishing strong ties with government agencies leads to more resource acquisition among women-owned tourism businesses than strong business ties with suppliers • Business ties are more beneficial when they mediate the effect of EO on performance and become weak and negative when the effect is sequentially mediated by business ties and network resource acquisition 	Structural equation modeling

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Fillimonau et al. (2022)	Local cultural traditions reinforce various types of capital, strengthen the field of knowledge, and shape habitus of women entrepreneurs in critical times	33	<ul style="list-style-type: none"> • Women entrepreneurs in the Aral Sea region are driven by necessity-based and extrinsic motivations in a time of crisis • Social capital is important for women entrepreneurs in the region, as it is built with family, friends, policymakers, employees, and competitors • Local cultural traditions reinforce various types of capital, strengthen the field of knowledge, and shape the habitus of women entrepreneurs in critical times 	Qualitative
Figueroa-Domecq et al. (2020a)	The approaches of established entrepreneurs to sustainability and entrepreneurship are blurred	539	<ul style="list-style-type: none"> • Gender influences sustainable entrepreneurship in the tourism industry • There are broad gender differences in societal perceptions of risk aversion • Policy needs to account for the non-essentialized gendered dimensions that inhibit and enable sustainable tourism entrepreneurship 	Mixed methods approach

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Figueroa-Domecq et al. (2020b)	Dominant definitions and evaluations of entrepreneurship need to be questioned		<ul style="list-style-type: none"> • Dominant accounts of tourism entrepreneurship position successful entrepreneurial performance as masculine and economically informed, undervaluing gendered difference in approaches to entrepreneurship • Feminist postcolonial, political economy, and poststructuralist approaches can help to question the implicit economic and masculine bias in the literature • Scholars should diversify the locations of research on entrepreneurship and gender and engage more with policy critiques 	Observational
Figueroa-Domecq et al. (2020c)	Gender diversity programs promote women representation on the board of directors in the tourism industry		<ul style="list-style-type: none"> • There is a double gender gap in the tourism industry when it comes to ICT or high-tech organizations • The composition of Board of Directors (BOD) and Management Teams (MT) in the biggest multinationals in the tourism industry is affected by the technological level of the companies • Gender Diversity Programs promote women representation on the BOD and this relation is bi-directional 	Observational

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Wang and Keane (2020)	The hyper-competitive and masculinist fields of digital entrepreneurship and technical fields result in a devaluation of female entrepreneurship		<ul style="list-style-type: none"> • Women digital entrepreneurs in China face difficulty in gaining recognition due to the hyper-competitive and masculinist fields of digital entrepreneurship and technical fields • Traditional gender roles and family responsibility contribute to the devaluation of female entrepreneurship • Distinctions between the entrepreneur in a general sense, the creative entrepreneur, and female creative entrepreneurs are problematic 	Qualitative case studies
Kumari and Shankar (2020)	Rural women entrepreneurs are important for the economic development of our country		<ul style="list-style-type: none"> • Rural women entrepreneurship in the tourism sector is important for the development of India's economy • Rural women entrepreneurs face different challenges than their urban counterparts • Tourism can provide opportunities for rural women's development through entrepreneurship 	Case studies

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Samad and Alharthi (2022)	Self-efficacy, perceptions of women’s work, empowering leadership, and psychological empowerment significantly and positively influenced women entrepreneurs’ involvement in tourism	201	<ul style="list-style-type: none"> • Self-efficacy (SE), perceptions of women’s work (PWW), empowering leadership (EL), and psychological empowerment (PE) significantly and positively influence women entrepreneurs’ involvement in tourism (WEIT) • WEIT significantly and positively impacts sustainable tourism development (STD) • The research model developed in this study incorporates PWW, SE, EL, PE, tourism involvement, and STD in light of social exchange theory and social identity theory 	Observational
Martini et al. (2020)	Female entrepreneurs play a very important role in the development of sustainable mountain tourism	11	<ul style="list-style-type: none"> • Female entrepreneurs play an important role in the development of sustainable mountain tourism • Elements of authenticity, experientiality, and innovation are characteristic of female entrepreneurship • Women are more likely to create and foster local stakeholder networks linked to their businesses 	Exploratory research

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Bullough et al. (2021)	The interplay and nuances of women's entrepreneurship and culture are currently understudied	64	<ul style="list-style-type: none"> • Women's entrepreneurship is an important factor for social and economic growth • This paper presents eight empirical papers that explore the dynamic interaction between gender and culture in shaping women's entrepreneurship • The research is organized into three interconnected themes: gender role expectations and identities, societal cultural dimensions, and the entrepreneurial environment 	Exploratory research
Munitlak-Ivanović et al. (2022)	Women from the Moravica District who are independently engaged in tourism are faced with various challenges		<ul style="list-style-type: none"> • Women entrepreneurs in the Moravica District face various challenges in the tourism industry, such as lack of training and education, and limited access to financial resources • There is a need for more education and training opportunities to help women entrepreneurs in the Moravica District gain the necessary information on different subsidies that could help them with their business operations • Women entrepreneurs in the Moravica District have potential for further development in the tourism industry, but they need more support and resources to do so 	Qualitative

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Maliva et al. (2023)	The crisis caused by the pandemic exposed tourism as a risky business and a gamble for many women	51	<ul style="list-style-type: none"> • Women in the study adopted one of three entrepreneurial strategies in response to the COVID-19 pandemic: (re)committing to the tourism industry, diversifying their business interests, or moving away from tourism altogether • The crisis caused by the pandemic exposed tourism as a risky business and a gamble for many women, who are considering leaving the sector • Priority policy areas for supporting women to remain within tourism are identified to help support women entrepreneurs and ensure their skills and enthusiasm contribute to rebuilding and reshaping the sector 	Qualitative
Kutlu and Ngoasong (2023)	Gender influences are socially embedded drivers that inform how women entrepreneurs create and operate sustainable business model archetypes in the business realm	14	<ul style="list-style-type: none"> • This article develops a theoretical framework for uncovering gender influences on sustainable business models by women entrepreneurs in a highly patriarchal and established tourism destination • Empirically, the article provides evidence of gender influences that materialize as gendered perceptions of identity, role expectations, and legislative practices (regulative) • The study provides managerial and social policy implications that encourage and support women entrepreneurs in pursuing sustainable business models 	Qualitative

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Vukovic et al. (2021)	Self-employment is the leading goal of women's empowerment	513	<ul style="list-style-type: none"> • Self-employment is the leading goal of women's empowerment in rural areas • Local tourism stakeholders can support the development of rural areas and increase employment opportunities for women • Women in rural areas have the potential to become economically independent through tourism-related activities 	Quantitative
Tryphone and Mkenda (2022)	Post-primary education, attendance of specialized training in tourism, engagement in other economic activities, and being previously employed reduce the likelihood of solely owning a business	475	<ul style="list-style-type: none"> • Post-primary education, attendance of specialized training in tourism, engagement in other economic activities, and being previously employed reduce the likelihood of solely owning a business, while initiation of the business idea increases it • Women need entrepreneurial education to acquire experience, develop right attitudes, and foster networks for entrepreneurship • Increasing awareness on availability and access to the Women Development Fund (WDF) and strengthening the enforcement of laws governing ownership of land could provide women with start-up capital and means to access formal loans that require collateral 	Observational

(continued)

Table 1 (continued)

Authors	Abstract summary	Participants	Main findings	Study design
Dan and Shimizu (2022)	Family tourism businesses have unique resources to empower women in remote island destinations	11	<ul style="list-style-type: none"> • Qualitative case study of 11 women entrepreneurs in Tioman Island, Malaysia, revealed that family organization setting, familiness nature, and tourism industry as a setting modifier have greatly mobilized women into family tourism entrepreneurship • Opportunities from the family organization setting, familiness nature, and tourism industry have enabled women entrepreneurs to become competitive in the family tourism business • This study provides empirical knowledge on family tourism business methods to mobilize women entrepreneurs in rural Tioman Island in Malaysia 	Qualitative Case study

Additionally, a separate research endeavor was conducted to examine the progression of female entrepreneurship within the tourism sector in Armenia. The study surveyed women intending to establish a business within the tourism industry. The findings revealed that these women require assistance in several areas, such as business development, innovation, marketing strategies, and the ability to attract tourists. According to Tovmasyan (2022), the findings have the potential to serve as a foundation for various initiatives aimed at fostering sustainable female entrepreneurship within the tourism sector.

Furthermore, an additional scholarly investigation sheds light on the correlation between the orientation toward entrepreneurship, networks, and the success of firms operating in the tourism sector within Ghana and Nigeria. Ribeiro et al. (2021) found a significant correlation between entrepreneurial orientation (EO) and enhancing social links, resource acquisition, and overall company performance. The study also demonstrated that developing strong connections with government agencies increased resource acquisition. The present study investigates the experiences of women who manage tourist firms in a place affected by an anthropogenic environmental disaster. The study reveals that necessity-based and extrinsic motives are prevalent among individuals during a crisis. Additionally, it highlights the significance of social capital for women entrepreneurs. The study conducted by Filimonau et al. (2022) demonstrates that local cultural traditions play a role in strengthening different forms of capital and supporting the psychological well-being of women entrepreneurs in the tourism industry during the COVID-19 pandemic.

Many scholarly investigations have been conducted to examine the influence of gender on the phenomenon of female entrepreneurship. The study undertaken by Figueroa-Domecq et al. (2020a) focused on the examination of the role of gender in sustainable tourist entrepreneurship. The study employed a poststructuralist theoretical framework and utilized a mixed-methods research design to comprehensively examine the intricate interplay between gender and sustainability throughout various phases of entrepreneurial endeavors. Research has revealed the existence of significant gender disparities in society's attitudes toward risk aversion. However, it is worth noting that experienced entrepreneurs often exhibit a notable convergence in their approaches, erasing these gender-based distinctions.

A comprehensive examination of the existing scholarly literature about the interplay between gender, tourism, and entrepreneurship was conducted in a separate academic publication. Scholars have argued that prevailing perspectives on tourism entrepreneurship tend to portray successful entrepreneurial performance as being masculine and driven by economic considerations. However, it has been suggested that adopting feminist postcolonial, political economy, and poststructuralist frameworks could be valuable tools for challenging this bias (Figueroa-Domecq et al., 2020b). The investigation also examined the dual gender disparity within the tourism business, specifically focusing on ICT or high-tech organizations. The study by Figueroa-Domecq et al. (2020c) revealed a significant correlation between the technical advancement of organizations and the under-representation of women

in decision-making positions. Additionally, the researchers concluded that implementing Gender Diversity Programs effectively enhances the participation of women on the Board of Directors.

Additionally, a separate scholarly piece delves into the challenges encountered by women engaged in digital entrepreneurship in China. According to Wang and Keane (2020), the devaluation of female entrepreneurship can be attributed to the convergence of hyper-competitive and masculinist environments prevalent in digital entrepreneurship and technological sectors and the persistence of traditional gender roles and family responsibilities.

Furthermore, an additional scholarly article investigates the phenomenon of entrepreneurship among women residing in rural areas within the tourist industry. This study explicitly emphasizes the necessity of women entrepreneurs in the tourism sector and the various obstacles and problems encountered by rural women. Additionally, it delves into the prevailing issues and complexities inherent in current tourism practices. Kumari and Shankar (2020) additionally provide strategies for promoting women's empowerment through tourism.

Furthermore, this exploratory project aims to investigate the contribution of female entrepreneurs in the development of sustainable tourism within marginalized rural mountain regions. According to Martini et al. (2020), female entrepreneurship is characterized by authenticity, experientiality, and innovation features. Additionally, women are found to have a higher propensity for establishing and nurturing local stakeholder networks.

It is crucial to highlight that a significant matter is being addressed in the form of eight empirical articles that delve into the intricate relationship between gender and culture in influencing the phenomenon of women's entrepreneurship. Bullough et al. (2021) provide a research framework that centers on the intersection of women's entrepreneurship and culture. This framework emphasizes the examination of gender role expectations and identities, societal and cultural factors, as well as the entrepreneurial environment.

Another study examines female entrepreneurs' involvement in the Moravica District's tourism industry. The study revealed that female entrepreneurs encounter many obstacles, including inadequate training and education within the tourist sector, as well as limited availability of financial resources. According to researchers, there is a suggestion to implement neuroeducational and training programs to support female entrepreneurs (Gkintoni et al., 2023c; Tzachrista et al., 2023; Munitlak-Ivanović et al., 2022).

Furthermore, scholarly investigations have also examined the repercussions of the recent pandemic on female entrepreneurship in the existing body of study. This article examines the gendered implications of the COVID-19 epidemic on women employed in the tourism sector in Tanzania. The study revealed that women employed one of three distinct entrepreneurial techniques to safeguard their financial stability and personal security. Maliva et al. (2023) have identified priority policy areas that aim to assist women entrepreneurs and facilitate the utilization of their abilities and passion in rebuilding and restructuring the industry.

Additionally, a theoretical framework was established to elucidate the impact of gender on sustainable business models used by women entrepreneurs in a separate research endeavor. The study conducted by Kutlu and Ngoasong (2023) presents empirical data highlighting gendered conceptions about identity, role expectations, and legislative behaviors. Furthermore, the study explores the potential ramifications of these findings on managerial and social policy.

The function is additionally designated as the impact of self-help groups on female entrepreneurship and self-employment in the tourism sector within a rural region of Serbia, as examined through a quantitative research approach. According to Vukovic et al. (2021), their study revealed that self-employment emerges as a prominent objective for promoting women's empowerment. Additionally, the authors observed that local tourism stakeholders' support can augment rural regions' tourism prospects.

Furthermore, an additional scholarly article delves into the factors influencing the obstacles women-owned tourism-related firms face in Tanzania. According to a study by Tryphone and Mkenda (2022), the possibility of exclusive business ownership is diminished by factors such as receiving post-primary education, participating in specialized tourist training, engaging in alternative economic activities, and having prior employment experience. Conversely, the probability of exclusive business ownership is heightened by launching a business idea.

Finally, in a qualitative case study, an examination is conducted on the resources utilized to facilitate the engagement of women entrepreneurs in family tourist enterprises in Tioman Island, Malaysia. According to Dan and Shimizu (2022), women have been significantly drawn into family tourism entrepreneurship due to many factors, such as opportunities within the family organization structure, gender, and the tourist business.

5 Discussion and Conclusion

Integrating digital approaches and e-skills in travel business marketing is closely interconnected with other domains as a foundation for marketing strategies and technical progress within the travel sector. The initial analysis classified it as a domain that establishes a connection between women's involvement in entrepreneurship within the tourism industry, the utilization of digital marketing tactics, and proficiency in e-skills (Gousteris et al., 2023; Stamatou et al., 2022). Entrepreneurs and marketers are keenly interested in studies on digital tools and communication methods. Specifically, they focus on effectively exploiting technology to enhance marketing efforts and increase exposure. This dynamic and developing association's anticipated progression and enhancement are projected to occur gradually over time.

Digital Approach and E-Skills in Travel Business Marketing on the tourism industry, marketing tactics, customer engagement, and the entire travel experience are now underway. Furthermore, the scholarly community affiliated with entrepreneurship and digital marketing strongly connects with technology adoption and innovation studies (Jamal & Getz, 1995). Hence, the correlation between the digital

environment and the implementation of entrepreneurial activities within the tourist industry holds significant importance, particularly in tackling obstacles associated with online promotional strategies, consumer engagement, and the effective utilization of technical advancements to enhance tailored client experiences.

This study emphasizes the importance of using digital marketing strategies and e-skills within Women's Tourism Entrepreneurship (Hassan & Ramkissoon, 2023). Implementing technology-oriented marketing strategies and effectively utilizing digital resources can significantly influence the growth and achievement of travel firms managed by women (Tristani et al., 2022). Moreover, successfully incorporating electronic talents (e-skills) into marketing tactics can boost female entrepreneurs in the tourism sector, bolstering their presence and prominence within the fiercely competitive market. By comprehending the dynamic nature of digital marketing and technology usage, travel companies run by women can strategically position themselves to achieve long-term growth and enhance their competitiveness.

Examining the chosen studies highlights the significance of the correlation between Women's tourist Entrepreneurship, Digital Approach, and E-Skills in Travel Business Marketing, offering unique perspectives into the dynamic and always-evolving environment of the tourist industry (Sotiriadis, 2018). Examining prominent themes, including digital marketing strategies, technological tools, and the significance of e-skills, presents pragmatic consequences for formulating proficient marketing strategies within the tourism domain (Melo et al., 2021). Given the ongoing evolution of the area, it is imperative to conduct additional studies to thoroughly investigate the possibilities of digital marketing and e-skills in empowering women's entrepreneurship and promoting the growth and long-term viability of travel firms.

Future research in this area should focus on further investigating the various aspects and dimensions that still need to be fully explored. The necessity of conducting future studies in Women's Tourism Entrepreneurship is paramount to address rising difficulties and thoroughly investigate untapped prospects effectively (Kimbu & Ngoasong, 2016). Given the swift progress in digital technology, it is imperative to investigate and adopt inventive marketing approaches specifically designed for travel companies operated by women. Subsequent investigations may focus on integrating nascent technologies, such as virtual reality, artificial intelligence, and augmented reality, to augment customer engagement and facilitate individualized experiences. Understanding client behavior and preferences is essential in the fiercely competitive tourism industry. In addition, future investigations may explore consumer patterns and anticipations, specifically about the utilization of technology in trip planning, booking, and post-travel engagements. This observation can provide valuable guidance for female entrepreneurs to develop focused marketing strategies and design service offers. Acquiring e-skills is crucial for empowering women entrepreneurs, given the significant role technology plays in marketing and corporate operations. Future studies may investigate and examine effective training programs and efforts in equipping women with the necessary digital abilities to thrive in the digital environment. The examination of the influence of digital marketing and e-skills on sustainable and responsible tourist practices holds significant importance (Kimbu et al., 2018). Future research may investigate the potential for women-led

travel businesses to utilize internet platforms to promote environmentally sustainable and socially responsible tourism alternatives. The phenomenon of women's tourist entrepreneurship frequently transcends national boundaries. Subsequent investigations may explore the complexities and potential advantages inherent in cross-cultural marketing endeavors, particularly the nuanced cultural sensitivities and linguistic disparities within diverse target markets. The utilization of social media has emerged as a potent instrument for marketing and communication. Future research may investigate practical techniques that women-led travel companies can employ to effectively utilize social media platforms to enhance brand exposure and engage with customers. Ultimately, examining the significance of collaboration and networking within the tourism industry for women entrepreneurs can yield valuable knowledge regarding the establishment of alliances, acquisition of resources, and cultivation of a nurturing environment conducive to advancing women's entrepreneurship in the digital era. Furthermore, this research can contribute to the sustainable expansion of the tourism sector.

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Tourism Education and Digital Learning Environments: The Contribution of Transformative Learning



Sofia Kallou, Aikaterini Kikilia, and Michail Kalogiannakis

Abstract In today's era of rapid technological developments, new perspectives and challenges are emerging for tourism education. Faculty and students in tourism education consider the use of digital educational technologies an integral part of learning. However, the focus on exploring new teaching methods, techniques, and learning styles in virtual classrooms is an area of particular interest, differing significantly from in-person teaching. In this context and in line with modern educational practices, the utilization of Transformative Learning as a methodological tool through digital learning environments becomes essential as it provides interaction and engagement through dialogue and critical reflection. The main objective of this research paper is to investigate the effectiveness of digital learning environments, and the contribution of Transformative Learning in the tourism education learning process. According to this paper's findings, students in tourism education benefit from digital learning environments in terms of knowledge consolidation and the socio-emotional level. The implementation of Transformative Learning process is an effective methodological process with potential learning results providing intense interaction, facilitated communication, and fostering connection between students.

Keywords Tourism education · Transformative learning · Digital learning environments · Online education · Teaching methods

JEL Classifications Z3 · Z32 · I23 · I21 · M53 · L8

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1 Introduction

In today's modern era of rapid growth, tourism education is affected drastically through the dynamic expansion of digital learning technologies leading to shifts in educational tools, methods, and techniques. In the context of digital transformation, occurring in higher education, the need to change the educational structures with an emphasis on innovation and high-quality education is emerging (García-Morales et al., 2021). Digital technologies are adopted in most universities contributing to the expansion of new educational environments fostering the learning experience and developing a variety of skills from anywhere and anytime (Kallou et al., 2022a; Kim & Jeong, 2018).

The transition from traditional classroom teaching methods to online education challenges the academic community, while requiring new educational approaches which emphasize more student-centered and active techniques than lecture methods (Marinoni, 2020). Research shows that focusing on collaborative and interactive digital learning environments (DLE) which foster active learning brings multiple benefits to learners' outcomes (Cho et al., 2002; Kim & Jeong, 2018). Thus, developing digital synergetic tools that provide student-centered techniques could increase student participation and effectiveness (Steinberger et al., 2021; Uyanik, 2016).

In this framework, the implementation of innovative, engaging, and interactive educational processes, through DLE in tourism education, is considered imperative (Kallou et al., 2022a). Investigating the effectiveness of digital technologies and educational methods in tourism education can ensure students learning and engagement (Reynolds & Dolasinski, 2020).

The main objective of this study is to investigate the effectiveness of DLE and the contribution of Transformative Learning as a methodological educational tool in terms of cognitive and socio-emotional dimensions in tourism education and training.

2 Literature Review

2.1 *Digital Learning Environments in Tourism Education*

The rapid growth and integration of emerging technologies are changing perceptions in all aspects of education (Dorouka et al., 2020), providing new methodologies, applying new practices in the educational process, and developing new types of high-level skills (Tzimogiannis, 2019). Digital educational technologies and online learning are flexible learning environments characterized by autonomy and ubiquity, promoting the learning process while providing interactivity and engagement (Kallou & Kikilia, 2021; Mackness et al., 2020).

DLE leads to radical changes in knowledge, educational objectives, and tools, while enhancing the learning process (Tzimogiannis, 2019). The education sector, given that the new data is adapting to the current trends and challenges, proposes the

adoption of digital educational technologies and the implementation of new teaching strategies in higher education, mainly based on the interaction and connection of the participants (Kallou et al., 2022a).

The use of digital learning tools has many advantages by enabling communication and interaction, regardless of time and geographical location. It also allows for personalization and flexible access to the learning process, better time management, and convenience, while reducing costs (Aithal & Aithal, 2016). Research shows that digital learning tools and online learning are just as effective as classroom environments, as they assist the learning process by emphasizing communication, interaction, and relationship building (Qiu et al., 2020).

According to the research, students and academics are positively inclined toward digital educational technologies as they provide flexibility, interactivity, and personalization facilitating the learning procedure (Aithal & Aithal, 2016; Leszczynski et al., 2018). In recent years, several researchers have advocated the use of interactive learning technologies in higher education to encourage students to actively participate and connect with their instructors and peers, while attending courses in virtual classrooms (Bond et al., 2020).

In tourism education, digital technologies provide opportunities to enrich the traditional learning experience and develop professional knowledge and skills (Balula et al., 2019). Digital tools have been integrated into education programs, improving the quality of the learning process, and enabling learners to meet the needs of the knowledge society. Thus, they enhance learning and teaching practices, encouraging active participation and interaction while helping participants to develop new skills and competencies (Annaraud & Singh, 2017; Kallou et al., 2022a). Lecturers and students in higher tourism education consider the use of digital educational technologies inevitable. However, the need to understand how to teach and learn in virtual environments is an element that has been of particular concern to them, as it differs significantly from the traditional classroom (Lugosi & Jameson, 2017).

2.2 Web Conferencing Technologies

Web conferencing technologies are also digital learning tools becoming increasingly popular in tourism education and training as they are key elements of distance education, supporting the learning process and enabling communication and interaction between the instructor and learners in a flexible manner (Pokhrel & Chhetri, 2021).

Moreover, web conferencing technologies provide immediate feedback and flexibility, enhancing real-time interaction and engagement of participants, as well as the exchange of emotions, while supporting social presence (Jiang & Koo, 2020; Kallou et al., 2022b; Orfanakis et al., 2016). D'Errico et al. (2016) showed that learners' positive emotions in online learning are higher than negative emotions.

2.3 Transformative Learning

Transformative learning (TL), developed as a theory by the American sociologist Jack Mezirow (1923–2014) in 1978, is considered the most comprehensive, popular, and influential theory in the field of adult education in recent decades (Illeris, 2018). It is a theory that is in constant evolution, engaging the scientific community in an ongoing dialogue (Cranton & Taylor, 2013).

TL is based on two axes: (a) rational dialogue and (b) critical reflection. Based on these axes, the change of dysfunctional epistemological, social, and psychological assumptions that lead to distorted perceptions and ineffective behaviors is achieved. The starting point, however, for the dialogue leading to the critical examination of the learner's assumptions and the prospect of transformation, according to Mezirow (2007), is experience.

The application of the student-centered approach of TL in tourism education can increase engagement and provide better learning outcomes, compared to the traditional and educator-centered lecture method (Uyanik, 2016). Mezirow's theory is characterized as interactive, providing learners commitment during the learning process (Tsimane & Downing, 2020). To include and enhance dialogue, educators should create a climate characterized by the expression of emotions, empathy, respect, and equal opportunities for all, while allowing learners to be open to their views (Kokkos, 2015).

2.4 Teaching Techniques in Adult Education

Teaching techniques are defined as the set of activities and methodological approaches that help the educator to achieve the objectives of a program or a teaching unit, with the aim to activate learners and meet their needs. (Tsuboukli, 2007).

According to Courau (2000), adults learn best using appropriate educational techniques which promote participation and motivate the learner allowing them to take an active role during the learning process. Essentially, through active participation, the learner moves from being a passive receiver to an active partner (Courau, 2000). In addition, the utilization of active educational techniques leads to increased student interest while cooperation, teamwork, and communication are developed (Fayombo et al., 2012).

3 Aim of the Study and Research Questions

This paper investigates the effectiveness of DLE and the contribution of educational methods to the learning process in tourism education. Particularly, this study will attempt to shed light on the research in DLE in combination with the implementation of Transformative Learning as a methodological tool (Kikilia et al., 2022).

In this framework, an educational training program was adopted in the Tourism Management Department at the University of West Attica, in Greece, in which two different methodological approaches were implemented through DLE: TL approach in the experimental group and traditional educational methods in the control group (Kallou et al., 2023b). The purpose of this study was to investigate the effectiveness of DLE in a human resources training program, both at the cognitive and socio-emotional level, and the contribution of teaching methods to these outcomes, and more specifically the application of TL vis-à-vis the traditional lecture method.

The research questions (RQ) of this study refer to the impacts of DLE in tourism education and the role of TL as a methodological educational tool:

(1) in terms of the consolidation of knowledge, (2) regarding communication and interaction, and (3) regarding the emotional level.

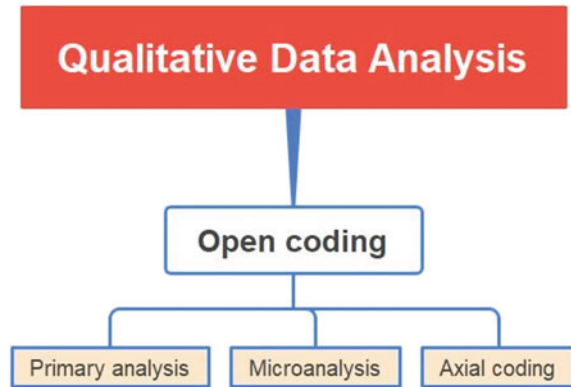
4 Methodology Design—Implementation of the Survey

This research adopted a qualitative method design for the evaluation of students' responses toward DLE and the methods implemented in a human resources training program in the tourism sector. In this research, the experimental method was also applied.

Particularly, the survey was conducted through web conferencing technologies with the participation of undergraduate and postgraduate students of the tourism sector, all of whom had working experience, who were divided into two (2) small groups to facilitate the conducting of the survey. The first group was defined as the experimental group, while the second as the control group. The training program lasted 3 months and consisted of 8 modules for each group (Kallou et al., 2023b).

In this current educational program, the teaching techniques used for the experimental group were derived from adult education and were student-centered, promoting active participation to increase the learner's interest and facilitate learning (Courau, 2000). More specifically, they included case studies, brainstorming, role-play, group work, discussions, questions and answers, short-duration lectures, and homework exercises. On the other hand, in the control group, more traditional and educator-centered teaching techniques were used, based mostly on lectures, and included questions and answers, case studies, and homework exercises (Kallou et al., 2023a).

Fig. 1 The stages of the qualitative data analysis



For the purpose of this training program, web conferencing technologies were used as modern digital learning platforms providing instant feedback, learning from anywhere flexibly, while enhancing interactions (Kallou & Kikilia, 2021).

At the end of the program, students were interviewed with semi-structured interviews and open-ended questions. Regarding the qualitative survey, the first stage of analysis of the transcript followed the procedure of open coding analysis with the aim of forming concepts to a primary degree. The primary analysis is based on data segmentation and coding of relevant extracts. The second stage was through microanalysis, a data segmentation by interpreting the text, extracting the raw codes, organizing the material, and classifying it into codes related to the conceptual categories of the research, with the aim of drawing conclusions. The third stage, the axial coding, involved data processing, to highlight the relationships of key categories and reduce the volume and complexity of initial concepts (Tsiolis, 2014) (Fig. 1). After processing the findings through open coding analysis, the results were extracted to investigate whether there were differences between the two groups.

5 Results

5.1 Research Sample

The sample of this research included undergraduate and postgraduate students of the Department of Tourism Management of the University of West Attica. These students all had working experience.

The sample size was set at 58 participants, at the beginning of the program. Among them, 24 students ($n = 24$) in the experimental group and 26 students ($n = 26$) in the control group have managed to complete the training program (Kallou et al., 2023a). Regarding the sample of the experimental group, 14 of the participants were female (58%) and 10 were male (42%). Concerning their age, half of them were between

the age of 18–28. Regarding the sample of the control group, 19 of the participants (73%) were women and 7 of them (27%) were men. Concerning their age, 12 of them (46%) were between 18 and 28 years old.

5.2 Cognitive Level

5.2.1 DLE and Cognitive Outcomes

According to the findings of the qualitative analysis, most of the students in the experimental group considered that the digital environment was effective considering the learning process (21 out of 24). Although some of the participants preferred face-to-face teaching for more direct contact and communication, they found the courses effective. The variety and enriched educational material and tools were considered interesting, and enjoyable with targeted slides, short videos, case studies, role-plays, digital storytelling, and quizzes with immediate feedback of correct answers for consolidating knowledge. Furthermore, the students stated that the digital rooms greatly facilitated interaction and dialogue. They also reported that the digital environment was flexible, interactive, and enjoyable, and they could better manage their time and participate to a greater extent in relation to the classroom environment, as they felt more comfortable and safer, with less stress, shame, and fear of being judged. Some students also stated that they had better concentration, with no distractions compared to the classroom environment.

Most of the students in the control group (21 out of 26) considered that the digital learning environment was effective and supported the learning process. Many students mentioned that the digital educational tools (quizzes, slides, digital storytelling) and material kept their interest active. Time management, flexibility, and the convenience of their home were particularly emphasized. One student experienced distraction problems.

Based on the above, learners in both groups benefited from the digital learning environment. As they reported, in a climate full of trust and expression freedom, the courses were interactive, and knowledge was instantly absorbed. Moreover, a variety of innovative digital educational tools were utilized, engaging participants and maintaining their interest (Tables 1 and 2).

5.3 Socio-Emotional Level

5.3.1 DLE and Communication, Interaction

Most of the participants (21 out of 24) of the experimental group argued that the digital learning environment facilitated communication and interaction with the other participants as well as the educator. According to them, the dialogue developed in

Table 1 Cognitive outcomes in DLE

Category	Experimental group		Control group	
	Findings	Students	Findings	Students
Consolidate knowledge	Effective considering the learning process	S1, S2, S3, S4, S5, S6, S7, S8, S9, S10, S11, S13, S14, S15, S16, S17, S18, S19, S20, S21, S23	Effective considering the learning process	S25, S26, S27, S28, S31, S33, S34, S35, S36, S37, S40, S41, S42, S43, S44, S45, S45, S47, S48, S49, S50
Digital environment	Digital environment was interactive, enjoyable, and flexible. Students felt more comfortable and safer, with less stress, shame, and fear	S5, S7, S8, S11, S14, S15, S17, S21	Digital environment was interactive and enjoyable. Students felt convenience attending from their home	S27, S40, S41, S43, S50
Educational tools and material	Quizzes, slides, videos, case studies, role-plays, digital storytelling, digital rooms	S1, S2, S3, S4, S6, S7, S8, S9, S10, S14, S16, S18, S19, S20, S21, S22, S23, S24	Quizzes, slides, digital, storytelling	S29, S30, S7, S31, S32, S33, S34, S35, S37, S38, S45, S47, S48
Time management	Time management was emphasized	S9, S11, S23	Better time management played a role in course attendance	S25, S26, S32, S34, S46
Concentration	Better concentration compared to the classroom environment	S9, S13, S22	Difficulty due to distraction in digital environment	S40

digital rooms facilitated interaction and communication to a high degree. A climate of respect and safety fostered by the educator contributed to reduce insecurities and improve communication. Thus, students could express themselves more easily and comfortably, compared to the classroom environment, which is more uncomfortable.

Most of the students (14 out of 26) in the control group claimed that the digital environment facilitated communication and interaction with other participants and the educator. A significant number of them considered that there was limited interaction (11 out of 26), i.e., except only with the educator or students they already knew. A participant argued that there is more interaction and communication in face-to-face learning.

Table 2 Categories and examples

	Experimental group	Control group
Category	Example	Example
Consolidate knowledge	S2: <i>The digital environment was effective, and there was a positive benefit to everyone, through the quizzes, the slides, and virtual room... that's for sure</i>	S37: <i>Yes, it seemed very effective and very convenient</i>
Digital environment	S14: <i>I found out that digital environment helps me personally, because I feel more comfortable and secure, and I can analyze and express my opinion in a greater extent</i>	S43: <i>Yes, because I was at home, and I was comfortable</i>
Educational tools and material	S16: <i>The targeted powerpoint (keywords, appropriate images, few words) was helpful. The quizzes were confirming what I was learning, and the digital illustrated stories helped us to put ourselves in each other's shoes</i>	S37: <i>Because I'm a visual type of guy, I enjoyed watching the slides, and the stories with the sketches. I also liked the quizzes because we could answer them straight away</i>
Time management	S23: <i>It was functional for me to learn, otherwise I would not have been able to attend the program (due to lack of time), so I would have missed out entirely on this beneficial program</i>	S26: <i>It helped me a lot, because I wouldn't be able to attend it in person due to lack of time</i>
Concentration	S22: <i>Digital environment enabled me to participate actively, without distraction</i>	S40: <i>I'm more distracted through the online environment than in person</i>

Based on the above findings, it can be concluded that the participants in the experimental group were helped to a greater extent by the digital environment in terms of communication and interaction than the control group, due to the utilization of TL and active learning techniques of adult education (Tables 3 and 4).

5.3.2 DLE and Connection

Most of the participants (21 out of 24) of the experimental group stated that the digital learning environment facilitated the connection between the participants due to the development of dialogue and sharing of experiences among the participants which helped them get to know each other within the virtual groups. The fact that they felt comfortable also played an important role, due to the intimacy that was developed at the digital groups. It was also mentioned that in the classroom environment, they might not have had this connection.

Most of the students of the control group (17 out of 26) claimed that the digital training environment did not help them connect with other participants. For the

Table 3 Communication and interaction in DLE

Category	Experimental group		Control group	
	Findings	Students	Findings	Students
Communication and interaction	Digital environment facilitated communication and interaction	S2, S3, S4, S5, S6, S7, S8, S9, S10, S11, S12, S13, S14, S15, S16, S17, S18, S19, S20, S21, S23	Digital environment facilitated communication and interaction	S25, S27, S28, S29, S31, S33, S37, S41, S42, S45, S46, S48, S49
Limited interaction			Digital environment characterized by limited interaction	S30, S32, S34, S35, S36, S38, S39, S40, S43, S47, S50
Techniques	Dialogue in virtual teams played an important role and facilitated interaction and communication in a high degree	S3, S5, S8, S10, S11, S13, S14, S16, S18, S23		

Table 4 Communication and interaction in DLE

	Experimental group	Control group
Category	Example	Example
Communication and interaction	S4: <i>We were able to communicate with each other through the virtual rooms. In this respect, the online environment was not inferior to the in-person environment</i>	S49: <i>Yes, there was communication and interaction but there could have been more</i>
Limited interaction		S35: <i>No, I could not communicate with other participants. I could only communicate with the educator</i>
Techniques	S5: <i>Communication and interaction through dialogue were very strong elements, especially in digital groups</i>	

minority of the group (6 out of 26), it helped them connect to a small extent or with people they already knew.

Based on the above, it can be concluded that the digital environment in combination with TL facilitated the connection and intimacy between the participants in the experimental group, since working in teams through digital rooms played a crucial role.

Table 5 Connection in the digital environment

Category	Experimental group		Control group	
	Findings	Students	Findings	Students
It facilitated connection	Students connected with each other. In the classroom environment, they might not have had this connection	S1, S3, S4, S5, S7, S8, S9, S10, S11, S13, S14, S15, S16, S17, S18, S19, S20, S21, S22, S23, S24	Students connected to each other	S26, S44, S46
It didn't facilitate connection	Students didn't connect	S2, S6	Students didn't connect	S27, S28, S29, S30, S31, S33, S34, S35, S36, S37, S38, S40, S42, S47, S48, S49, S50
Limited connection			Students connected with people they already knew	S25, S32, S39, S41, S43, S45
Techniques and tools	Dialogue and sharing experiences in teams through digital rooms helped to a significant degree	S3, S8, S10, S14, S15, S16, S18, S22		
Climate	Intimacy developed in teams through digital groups played a crucial role	S14, S16, S17, S21		

On the other hand, the lecture method applied in the control group did not facilitate connection between the participants (Tables 5 and 6).

5.3.3 DLE and Presence of Emotions

Most of the students of the experimental group considered that the digital environment was characterized by the presence of emotions, expressed through sharing experiences and the tone of the voice. The emotions of the educator were also perceived through the body language since the camera was on.

Most of the participants in the control group considered that the digital educational environment was characterized by the presence of emotions, in both participants and

Table 6 Connection in the digital environment

	Experimental group	Control group
Category	Example	Example
It facilitated connection	S14: <i>We had the opportunity to feel more comfortable and express ourselves to a greater extent, through virtual rooms. Yes, we had a greater connection with each other. On campus, we might not even talk to each other and not have the opportunity to connect</i>	S46: <i>Yes, it helped me, at one point when I mentioned a difficult situation, my classmates sent me messages in chat, "good for you for sharing," so distance didn't play a role at all</i>
It didn't facilitate connection	S6: <i>Digital environment was helpful in learning but not so much in connecting with each other</i>	S31: <i>No, I could not connect with others. The physical presence is very different, more connective</i>
Limited connection		S32: <i>There was connection with people I already knew. We even got closer to each other</i>
Techniques and tools	S18: <i>Yes, we connected to each other by sharing our experiences through dialogue in virtual groups</i>	
Climate	S14: <i>We felt more comfortable and expressed ourselves to a greater extent, so we had a better connection with each other</i>	

the educator. Many of the emotions that flowed were perceived through the tone of the voice.

Based on the above, it can be concluded that most of the students in both groups argued that the digital learning environment was characterized by the presence of emotions which were perceived through the tone of the voice or by the body language when the camera was on (Tables 7 and 8; Fig. 2).

6 Discussion

This paper investigates the impact of DLE and the efficiency of the TL process in a human resources training program in tourism education.

According to the findings and in line with the research question, it can be concluded that (Fig. 3):

RQ1: students in both groups benefited from the DLE concerning the cognitive level.

RQ2: students in both groups benefited in terms of communication and interaction.

The participants of the experimental group were benefited to a greater extent.

Table 7 Presence of emotions in DLE

Category	Experimental group		Control group	
	Findings	Students	Findings	Students
Presence of emotions	The digital environment was characterized by the presence of emotions	S1, S2, S3, S4, S5, S6, S7, S8, S9, S10, S11, S12, S13, S14, S15, S16, S17, S18, S20, S22, S23, S24	The digital environment was characterized by the presence of emotions	S25, S26, S27, S28, S29, S30, S31, S32, S33, S35, S36, S37, S38, S39, S40, S41, S42, S43, S44, S45, S46, S47, S48, S49, S50
Non-verbal communication—tone of voice	Emotions perceived and expressed	S7, S16, S20	Emotions perceived and expressed	S28, S39, S43, S44
Sharing of experiences	Emotions perceived and expressed	S3, S4, S8, S10, S13, S14, S17, S18, S20	Emotions perceived and expressed	S25, S32, S33, S35, S38, S39, S41, S43

Table 8 Presence of emotions in DLE

Category	Experimental group	Control group
	Example	Example
Presence of emotions	S10: <i>Yes, there was a constant presence of emotions in discussing our experiences</i>	S37: <i>Yeah, sure, just because we weren't in the same room doesn't mean we didn't share feelings. I felt understanding, support, etc</i>
Non-verbal communication—tone of voice	S20: <i>Even though we had the cameras off, we could understand the feelings of others through the tone of the voice</i>	S28: <i>We could understand the emotions of others to a great extent through the tone of the voice, and facial expressions in front of the camera</i>
Sharing of experiences	S8: <i>Yes, we were sharing various feelings and expressing them through the experiences we exchanged. We felt sadness, irritation, and joy, for example</i>	S32: <i>Yes, we were perceiving emotions through sharing personal stories which brought each other closer, there was empathy</i>

RQ3: students in both groups considered that the digital learning environment was characterized by the presence of emotions. Moreover, participants in the experimental group felt connected to their peers while participants in the control group did not.

Specifically, students in tourism education benefited from DLE in terms of knowledge consolidation and socio-emotional level. The implementation of the TL process

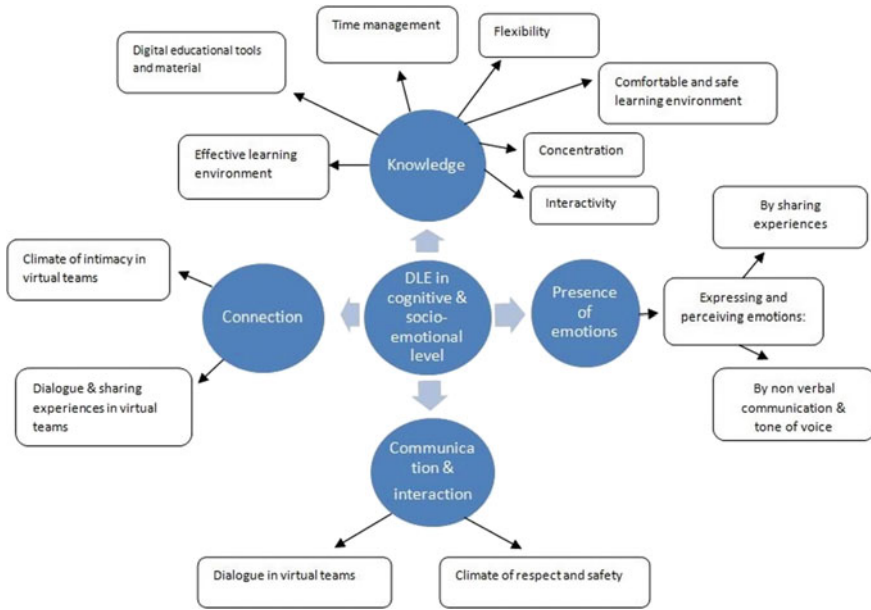


Fig. 2 Axial coding findings—experimental group

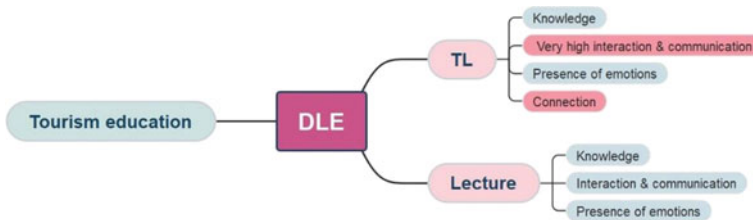


Fig. 3 Differences between the two groups according to the findings

in relation to traditional educational methods is an excellent methodological tool with potential results, providing intense interaction, facilitating communication to a high degree, and fostering connection with the other students. The use of DLE seems that is not inferior to the in-person educational procedure, confirming the international literature, which states that the adoption of digital technologies in tourism education is as effective as the classroom environment, providing autonomy and flexibility, supporting interaction, and generating feedback, while enhancing the learning process (Balula et al., 2019; Camilleri & Camilleri, 2022).

Students in both groups claimed that the digital environment was flexible and helped them involve to a greater extent than in face-to-face courses, since it was described by many of them to be more comfortable, resulting in less anxiety, fear, and shame, confirming previous research, according to which the great flexibility

provided by digital technologies and online courses allows for a wide application and follow-up of educational programs, since it ensures convenience, time management, and zero distances (Annaraud & Singh, 2017; Dorouka et al., 2020; Kallou et al., 2022a; Sobaih et al., 2021). Students also mentioned that the interactive digital learning tools maintained their interest alive. Additionally, digital rooms were a unique and interesting experience for the participants in the experimental group.

Moreover, the present research confirms previous studies where digital technologies are characterized by the presence and exchange of emotions (Annaraud & Singh, 2017; Stephan et al., 2019), as participants in both groups have confirmed that emotions were pervasive, during the learning procedure, even with the cameras off.

Additionally, students in both groups considered that the online course facilitated communication and interaction to a significant extent and maintained them constantly alert, as they mentioned, thanks to the abundance of the digital tools. The interactive exercises and techniques which were implemented in the experimental group promoted communication and interaction to a higher degree. Indeed, although some students would have preferred in-person learning in order to have more direct communication, they have considered the course very interactive.

It is worth noting that the educational strategies which were implemented through DLE played a crucial role, as it was found that in the experimental group's TL-based program, where dialogues and collaboration in digital groups were applied, there was greater interaction and communication among the participants, compared to the control group's program where the lecture-based technique was applied. The climate of respect, freedom, and safety contributed to reduce insecurities and improve communication. Thus, students could express themselves more freely and conveniently, compared to the classroom environment which is more uncomfortable.

Moreover, the digital learning environment facilitated the connection between the participants in the experimental group thanks to the constructive dialogue and sharing of experiences in groups through digital rooms which helped them get to know each other better. The fact that they felt comfortable also played an important role, thanks to the climate of intimacy which was developed in the digital groups, indicating that they would not have been able to connect if the training program had been implemented in the classroom environment. These findings are in full alignment with existing studies, according to which, DLT enables interaction and connection of participants, enhancing their motivation, while integrating modern methods and techniques in the learning process (Balula et al., 2019; Jiang & Koo, 2020; Mackness et al., 2020).

7 Conclusions

It becomes obvious that the use of educational technologies benefited students both cognitively and socio-emotionally. DLE are modern learning environments which are gaining ground, facilitating learning, and transforming the educational process

into an attractive and efficient procedure. Moreover, the implementation of student-centered methods, interactive techniques, and tools facilitate communication and interaction leading to an engaging and enjoyable learning experience. Consequently, the findings of this research highlight the beneficial contribution and effectiveness of the TL process in DLE.

The utilization of educational technologies in combination to TL enabled a collaborative approach to learning, facilitated interaction, and developed important skills. In particular, the implementation of the TL process in the experimental group and the dialogue developed in digital teams provided intense interaction, communication, teamwork skills, and collaboration, which are particularly important for those employed in the tourism sector, confirming the relevant literature (Adipat, 2021; Mackness et al., 2020). Additionally, the TL process had a significant role in connecting students in DLE, particularly working in teams through digital rooms which allowed students to meet and collaborate in groups discussing various issues given by the educator.

Emerging technologies are beneficial educational tools enhancing the learning outcomes and contributing to a social and an emotional level. The implementation of interactive digital learning tools with modern teaching methods and active educational techniques facilitates the learning procedure and helps students develop significant skills while keeping them engaged. More specifically, this study reveals that the adoption of TL through DLE is considered an excellent methodological process with potential learning results providing intense interaction, facilitated communication, and fostering connection between students.

8 Contribution, Limitations, and Future Research

Investing in DLE and modern teaching methods changes the learning landscape and adds value to educational processes while aligning with the demands of the modern era (Kallou et al., 2022a). This research is a contribution to the extensive scientific debate on DLE and educational technologies. The findings of this study have implications for the academic community, inspiring new methodological processes and techniques through DLE in tourism education and training in the foreseeable future. They can also guide educators, educational designers, and developers in the implementation of digital technologies in combination with the appropriate methods and techniques and especially with the TL process.

This research has severe limitations. The first limitation of this study is that the sample may not be representative, since the tourism students who participated in this study were selected from one specific university in Greece and recruited employing a convenience sample. The second limitation is that the findings are based on a specific educational program in human resources training.

Directions for future research involve repetition of this study in different training fields and the participation of students from different universities in tourism studies.

Another direction for future research concerns the implementation of different digital technologies (i.e.,: augmented reality, mobile learning) or a combination of them.

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The Impact of Digital Space Development on Students in Tourism and Digital Media



Mălăescu Simona, Chiorean Claudia, and Foris Diana

Abstract The post-pandemic tourism phenomenon and labor market accelerated the digital work demand allowing students from Generation Z to enter the labor market earlier. The digital system's fast pace creates pressure on future employees, the most susceptible being the students already working for online reservation platforms and digital media as a natural continuity of the FoMO phenomenon. In order to increase their competitiveness, students from digital professions work during their classes in the digital workspace. This paper presents preliminary data from an experimental study exploring the rapport between multitasking, text comprehension and retention, and burnout in students freelancing and working part-time in digital tourism, online booking platforms, and digital media. When students multitasked between reading professional news and a professor's lecture, the average value of the level of information retention, the logic coherence of text retained, and the overall level of text comprehension and retention was lower. The decrease in overall comprehension task was greater for tourism students in the case of professional news, but they performed better in the case of the lecture compared with students in digital media. This study offers arguments in favor of organizing the activity in the online system and balancing the study time and work time during the student period.

Keywords Digital tourism · Multitasking · Digital media · Digital burnout · Digital skills · Higher education

JEL Classifications Z31 · I3 · I23 · J29 · I31

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1 Introduction

The Euronews 2023 Travel Trend Report acknowledged that “the pandemic forced travel companies, attractions, and destinations to get on board with technology in ways they’d never previously imagined” [1:9]. The tourism sector was among the first economic sectors forced to massive layoffs by the pandemic—a workforce that did not return to the same jobs after 2021. Starting as a need for protection for the consumer, the pandemic and post-pandemic context created an opportunity for the tourism sector to restructure and reinvent itself, absorbing technology to enhance the tourist’s experience in a destination instead then replicating it (Parks & Embling, 2023). This transforming trend happened facilitated by a general tendency to maintain a measure of working from home and digital transformation of the economic sector. The European Union allocated 127 billion to support digital transformation through digital-related reforms and investments, mainly in the national Recovery and Resilience Plans (European Commission, 2023). The *Digital Economy and Society Index (DESI)* measuring the level of digitalization of businesses and e-commerce in 2022 reveals that only 7 European countries present a *DESI Index below 30%* (European Commission, 2023). The target for 2030 of the *Path to the Digital Decade* proposal aims at more than 90% of SMEs should reach at least a basic level of digital intensity (European Commission, 2023). According to DESI 2022’ report, the leading sector incorporating technologies, where enterprises are more likely to analyze big data, is tourism: the travel agency, tour operator reservation service, and related activities along with publishing and TV and music programs production and broadcasting leading with 28%. Nowadays, of the revenue in the global travel and tourism market, more than two-thirds came from online sales channels, with an estimated growth of 69 percent of online sales in 2023, according to Statista Mobility Market Insights (2023) (Statista Mobility Market Insights, 2023). As Coursera Global skills report (2021:3) (Coursera, 2021) pointed out, “skills will play a critical role in helping workers keep pace with the accelerated digital transformation that came with the pandemic. The top-performing countries across several economic outcomes show higher overall skill proficiency and over-index in many disruptive skills, such as Machine Learning, Financial Technology, and Critical Thinking.” UNWTO appreciates Digital transformation that “the future of travel is technology-based so that tourism jobs will require both technical and advanced soft skills (...) The most significant societal impact of digital transformation in tourism may be the effect on the sector’s workforce, which directly and indirectly represents 1 in every ten jobs worldwide... automation will change the nature of some travel jobs and eradicate others altogether” (UNWTO, 2023:np.). The other lever bringing an increased interest in technologization is the imperatives of using emerging technologies to modernize and develop tourism destinations (Foris et al., 2022) and adapting tourism resources exploitation (Mălăescu, 2023), especially heritage sites (Zotica & Mălăescu, 2015), to the need of interacting with the site during visits characteristic to the new generations of consumers primarily in the case of Generation Z. The accelerated technologization altered and affect not only the skills market but also the work schedule and ultimately the work/

life balance and blurred the work—personal or family life distinction primarily due to the opportunity to work from anywhere, including home and school, in the case of part-time working students. The digital system's fast pace creates pressure on current and future employees. Even before the pandemics, studies surveying subjective assessment of the potential effects of digitalization on work dimensions in home-care and public employment service sectors revealed that 39.5% of public service employees reported a perceived increased pace of work, 58.1% the intensification of work, 52.9% an increase in monitoring of the work and workers, 37.2% loss/standardization of social relationships with users, and 53.7% reported a digital skills gap [9:28]. Regarding psychological well-being, the same report concluded that the transition to digital working" has also led to an increase in digital harassment, mainly because users expect faster reactions and faster processing of their files when using digital tools to interact." [9:32]. Countries like Germany, the Czech Republic, Croatia, Greece, Slovenia, and Switzerland reported a specific shortage in digital skills, not necessarily tourism-specific but transferable across sectors (OECD, 2021). The fore-mentioned report mentioned that looking to satisfy the need for managerial skills in the digital tourism sector;" it was felt that those joining through the higher-education system are more likely to be digitally proficient. They will likely start with a stronger foundation in digital skills that should provide a solid basis for responding positively to further digitalization in their early and subsequent careers. However, the fact remains that not only will this take time to build the necessary management assets, but that tourism businesses will be seeking these recruits in competition with other sectors seeking similar attributes." [10:35].

So, the digitalization in fields like tourism and media generating the need for digital fluency in the workforce combined with the increasing opportunity to work remotely and the continuously growing demand for digital skills opened even more significant opportunities for the digitally native Generation Z to work starting early, as students still in higher education, working part-time or full-time while in school. The landscape of classes with students behind their laptops taking notes but simultaneously multitasking remote digital working and other academic tasks is the new normal. However, combining this opportunity with the characteristics of Generation Z needs closer attention to the effects.

The recently surveyed Gen Z task force struggles with an ambivalence between the FOMO and flexible work of having a complete choice in where they work (Deloitte, 2023a). The report published by Deloitte in 2023 revealed that 65% of Gen Z working value remote and hybrid work (and 61% do work remote/hybrid), while Indeed 92,023 (Indeed, 2023) shows that working remotely seems to generate in the case of 90% percents of the surveyed Gen Z, a FOMO regarding the experiences and opportunities other generations had working from a physical office. Deloitte's 2023 report showed that three-quarters of respondents working in remote or hybrid jobs would consider looking for a new job if that job requires going on-site full-time, primarily due to the proximity bias (the tendency of superiors to promote the employees more physically close to them). Asked about the impact of their choices in work/life balance, three-quarters of the surveyed Gen Zs acknowledged that their workload and poor work/life balance contribute to their stress levels, where 46% of

them feel stressed or anxious all or most of the time while” 36% of the respondents feel exhausted all or most of the time, 35% feel mentally distanced from their work, and 42% often struggle to perform to the best of their ability” [11:21]. Considering the current context, we appreciate that examining how new trends in remote digital work impact students’ academic performance under the condition of multitasking when students juggle between remote work and attending courses in higher-education programs is of paramount importance.

2 Literature Review

Based on the current trend mentioned above in the workforce for Generation Z and also Millennials, for the first time, periodic surveys run by companies such as Deloitte included an exclusive report on the mental health of Generation Z and Millennials workforce. This first report, “*Mental health today. A deep dive based on the 2023 Gen Z and Millennial survey*” (Deloitte, 2023b) condensed the main concerns regarding the mental health toll work it is taking on these generations and the main directions of actions their employers took to address this severe issue. The principal measures taken by employers to address the issue of burnout in the workplace and the measure the two generations access each of those measures are listed in Fig. 1.

Due to the profound connection between work and values constantly reported by surveying companies (Deloitte, 2023a; Indeed, 2023), the distinction between work and their mission or mark in the world is blurred to the point that Generation Z struggles with keeping a clear working schedule and working mental hygiene. Besides the continuum values-personal mission-work, their preference for working from anywhere has contributed to “always-on” workplaces, which might make it hard to disconnect, with seven in 10 Gen Zs and millennials responding to work emails/messages outside regular working hours [11:22]. It could explain why, even if not purposefully or fully aware, Generation Z students bring work at school and balance between keeping an eye on what is going on in the workplace and attending

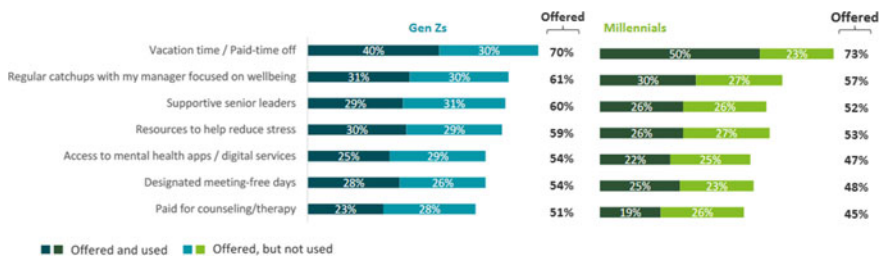


Fig. 1 The underutilization of the workplace mental health resources and support by generation (Deloitte, 2023:13) (for each generation with different colors are depicted in the left the amount of the respective resource offered and used by the employees in the left and the amount of resource offered but not used by the employees)

classes, especially the ones with compulsory presence. Sometimes, the design of academic activities seems to require less cognitive effort in a generous amount of time, so the students feel the need to “take a look” at what is going on at work or multitask between the lecture of the teacher in the class and professional news on social media. It gives them the satisfaction of increasing the value of time by not giving them time to connect and process the information profoundly. Multitasking on digital devices while learning influences comprehension, recall, and academic performance (Winneke et al., 2015), as we will analyze in depth in the following. Some reports (Deloitte, 2023a; Indeed, 2023) mentioned Generation Z’s regret that working remotely is not allowing them to connect socially and have real-life professional connections. By combining (part-time) work with school, the schoolmates could successfully substitute the social function of the workplace.

A lot of digital skills in great demand in the tourism sector after the pandemic could be conveniently exercised from anywhere; jobs like digital tourism marketing sales professionals and tourism data analysts implying digital fluency and making sense of data, including customer-generated data via online marketing, branding, and distribution, data collection, data management, UX writers, content creators, travel digital gaming designers, storytellers in marketing the destinations and accommodation structures, experience creators, peer-to-peer (P2P) platforms for collaborative content creation, search engine optimization customer-centric interactions, experiences, and services consumption, a system of advertisements, recommendations, and instructions about potential experiences; checking and analyzing customer feedback; answering customers and taking action to improve the quality of service and customer experience; detecting and managing fake reviews, processing and administration of electronic point of sales and other digital purchasing systems; generating, recording, and making sense of the platform and machine-derived data customer; developing, integrating, and re-elaborating content for digital systems and users, and managing content related to copyright and licenses, complying with data privacy and data security protocols.

2.1 Digital Media

We live increasingly in an intrusive digital society, confiscating our time, energy, resources, and mental health. The current digital society claims specific demands among media consumers, in general, and academic-level consumers, in particular. The pressure exerted on the public increases as its involvement is more remarkable. This phenomenon was named FoMo (Fear of missing out) after the effects that the lack of internet triggered among digital consumers. So, the FoMo syndrome refers to the fear or anxiety that digitally active people feel when they cannot connect to the Internet. This fear comes from the need to be constantly updated on the level of information. Otherwise, the impression is that they will be excluded from the group of information holders. The development of mobile technology, the Internet, and social networks have led to the appearance of emotional disorders or some mental

health manifestations that have not been researched until now: e.g., online addicts (Uncapher et al., 2017; Vedeckina & Borgonovi, 2021).

2.2 *Digital Skills*

Like any development process, digitization imposed a synchronous adaptation for the entire population (Loh & Kanai, 2016; Meshi et al., 2015; Mills et al., 2014). However, as was natural, the academic world experienced an accelerated process of acquiring technological skills, without which there would be no communication, collaboration, productivity, progress, or involvement in today's society. A systematic review of the research evidence on digital skills identified 34 studies that used cross-sectional survey methods to examine the association of digital skills with tangible outcomes. One part looked at the association with online opportunities, and another examined the negative aspects (Chiorean, 2022) that can appear online. The studies have shown a positive association between digital skills and online opportunities: information benefits and technological skills (Chiorean, 2023). However, digital skills were more associated with greater exposure to online risks. While technical skills were linked to mixed or adverse outcomes, informational skills were linked to positive outcomes. More research must be done on communication or creative skills (Livingstone et al., 2023).

2.3 *Digital Multitasking*

It is known that young people are heavy users of digital devices and also heavy practitioners of digital multitasking (Vedeckina & Borgonovi, 2021). Early on, researchers argued that frequent multitasking interferes with the development of attention networks and executive functions, which could lead to attention difficulties and proneness to frequent task-switching instead of sustained attention (Fox et al., 2009; Levine et al., 2007). Multitasking on digital devices while learning has hindered comprehension, recall, and academic performance (Winneke et al., 2015). Multitasking efficiency is affected by the quantity (quantity) of cognitive demands and the type (quality) of cognitive resources required for the task. Different multitasking demands will involve different degrees of cognitive demand. Some tasks are shown to be more easily combined than others, and studies have shown that people seem to have a natural preference for task combinations that do not overtax their cognitive capacity (Jeong & Fishbein, 2007; Rosen et al., 2013; Wiradhany & Baumgartner, 2019).

Most tasks are combined with music, watching TV, or eating. Nevertheless, the same thing does not happen when someone is playing video games or having phone conversations (Vedeckina & Borgonovi, 2021; Voorveld & Goot, 2013). Experimental studies analyze the effects of multitasking when tasks are more challenging

to combine. Although, the emergence of interactive technologies tries to solve the maximum efficiency of the user subject to multitasking (Hwang, 2014; Pea et al., 2012).

Previous studies associated digital media consumption in the following six months with higher attention deficit and hyperactivity disorder (ADHD) symptoms (Chaelin et al., 2018). Also, higher-education students with ADHD have been found to face difficulties in self-regulation of learning (SRL), especially for digitally displayed texts that are less effective (Hwang, 2014). The component of SRL most affected by digital text display is reading comprehension and self-monitoring (Yehudah & Brann, 2019).

Exploring the potentially positive valence of multitasking in training the ability to hold items in short-term memory, to switch between tasks, and to ignore irrelevant information, Ophir et al. (2009) found differences between self-reported light media multitaskers and heavy media multitaskers who performed worse on a variety of cognitive-control tasks, the authors concluding that the later present different levels of attentional and cognitive-control capabilities with a greater tendency for automatic processing. Another relevant study for the current research found that “media multitasking interferes with attention and working memory, negatively affecting GPA, test performance, recall, reading comprehension, note-taking, self-regulation, and efficiency” [35:np]. Earlier studies however contextualized that only non-academic (off-tasks) performance may be affected by the increased multitasking (May & Elder, 2018; Ophir et al., 2009) while social media consumption during learning impairs comprehension and test performance (Karpinski et al., 2013) (Junco & Cotten, 2012).

3 Methodology

The current study presents the first preliminary data analysis from a multiphasic research endeavor aiming to analyze the rapport between multitasking, text comprehension, retention performance, and burnout in students freelancing and working part-time in digital tourism, online booking platforms, and digital media. This research is part of the Research project Multitasking in the Academic digital world—Transnational Access to the Research Infrastructures (VITALISE) Framework Horizon 2020 Research and Innovation Program.

In order to explore these relationships, we measured the identification of self-perceived stress, the academic burnout and screened for the presence of ADHD in students from a tourism program and a digital media academic program and their self-reported academic performance.

Instruments: For measuring self-perceived stress, we used the Perceived Stress Scale (PSS) (Cohen & Janicki-Deverts, 2012), and for academic burnout, we used the Academic Burnout Scale (Zhang et al., 2015). Considering the impact the presence of ADHD has on academic performance [S1] during multitasking, we used for the screening the ADHD Self-Report Scale (ASRS) v1.1 (Kessler et al., 2005).

We also need to assess the level of text comprehension after one reading (stimulus 1) for both categories of students. In order to assess the level of text comprehension and retention, we developed for each stimulus a Text comprehension [CC2] check grid based on the theory developed by (Iser, 1978), (Ricoeur, 1973), (Fish, 1980) (Eco, 1979), (Holland, 1968), and (Cornea, 1988).

Experiment design: The entire experimental study explores variations between students exposed to 1, 2, respectively, three stimuli and tests their attention allocated to understanding information in digital space and managing the stress caused by multitasking. In this preliminary study, we analyze the correlation between the pre-experiment data and the academic performance during the first experimental condition of students exposed to a single stimulus: professional news from the travel and tourism industry in the case of tourism students and average media news in the case of digital media students. We also explore the impact of multitasking on text comprehension and free recall memory during the second experimental phase of hearing an audio lecture recording from their specific curriculum and reading professional news simultaneously (10 min for both tasks).

Procedure: Students are exposed to one stimulus in the first phase of the experiment, respectively, two in the second one. The first reading is done silently, individually. The methods of checking the understanding of the text after the first reading are exercises to fill in the white spaces for memory; questionnaires focused on the content evaluating the accuracy and logical coherence of the information in the text retention, and exercises with multiple variants for precision of the information. All these follow the verification of the first level of understanding and assume the comprehension of the text, reducing it to the significant issues addressed in the text content (Table 1).

4 Results

The descriptive statistics revealed the expected result: the average value of the level of information retention, the logic coherence of text retained, and the overall level of text comprehension and retention were higher in experimental step one when students were exposed to a single stimulus (Table 2). In the second experimental step when students multitasked between reading professional news and a lecture presented by a professor from their curriculum the average value of the level of information retention, the logic coherence of text retained and the overall level of text comprehension and retention was lower at the entire sample (Table 3). When we split the sample into two subsamples: the subsample of students enrolled in the tourism program and the one in digital media we observed that in the first step, the total level of retention ($M_g = 3.38$; $M_t = 3.4$; $M_{md} = 3.7$) and the overall level of retention and comprehension of the text were very similar in both subsamples ($M_{g1} = 82.6$; $M_{t1} = 82.2$; $M_{md1} = 83.0$). In the second experimental condition, however, the decrease in overall comprehension task was greater for tourism students in the case of text comprehension and retention of professional news, probably because students in digital media had better prior practice in reading, comprehension, and retention of

Table 1 The structure and type of items for each dimension evaluated by the *Text comprehension check grid*

Title/ content	1. How much...? (retention of quantitative data)	2. Which words are repeated in the text? (retention of qualitative data)	3. Which of the following options is correct? (the accuracy of the information)	4. Which version respects the order of events as described in the news? (the logical coherence of events)	5. Fill in the missing spaces with the information from the text. (free recall)
News Audio lecture	A B C D	A B C D	A B C	A. Sentence1-sentence4-sentence3 -sentence2 B. Sentence2-sentence3-sentence1-sentence4 C. sentence4-sentence3-sentence1 - sentence2	

Table 2 The descriptive characteristics of variables at the level of the entire sample ($N = 19$)

Students/variables	Mean	Std. Dev
Overall Academic perf	9.01	1.02
ADHD Screening sc	2.56	1.03
Self-perceived stress	24.44	7.63
Academic burnout	38.94	6.90
TotalretentionT1	3.38	1.24
FRT1	62.14	27.80
OverallPerfTask1	82.63	13.16
Totalretentiontask2Anews	2.33	1.316
FRTask2news	52.45	35.27
Overallperftask2Anews	79.05	18.67
Overallperftask2lecture	63.88	20.11
Totalretentiontask2Blecture	9.01	1.021
Memorytask2Blecture	2.56	1.03
MemoryTask2news	24.44	7.63

digital news in general—an experience that secured a performance almost unchanged in the condition of multitasking ($M_{md2nw} = 82.0$).

Although students from both programs had lower levels of comprehension and retention of the lecture during multitasking the students from the tourism program

Table 3 The descriptive characteristics of variables at the level of the subsamples

Students/variables	Media		Tourism		Employed students	
	Mean	Std. Dev	Mean	Std. Dev	Mean	Std. Dev
Overall academic perf	9.5	0.68	8.46	1.09	9.22	1.01
ADHD screening sc	2.40	1.07	2.83	0.98	2.28	1.11
Self-perceived stress	28.0	7.36	18.50	3.08	20.17	4.11
Academic burnout	41.30	4.11	35.00	9.09	41.83	3.06
TotalretentionT1	3.70	0.48	3.40	1.34	3.75	0.70
FRT1	70.0	27.08	82.22	15.83	53.57	26.61
OverallPerfTask1	83.0	11.10	2.70	1.63	82.5	11.01
Totalretentiontask2Anews	2.20	0.63	46.29	37.06	2.75	0.88
FRTask2news	58.0	34.57	75.37	22.58	49.16	28.21
Overallperftask2Anews	82.0	15.49	71.2500	19.77	75.8	18.13
Overallperftask2lecture	58	19.32	2.66	1.22	69.37	16.569
Totalretentiontask2Blecture			30.15	21.95		
Memorytask2Blecture			8.46	1.09		
MemoryTask2news			2.83	0.983		

performed better. The total retention of information (the retention of quantitative and qualitative data, accuracy, and logic coherence) was greater in students of MD, but higher in the memory for the tourism students. One of the pre-test characteristics that varied between the students from the two programs was the fact that students in media digital have a higher self-perceived stress ($M_{md} = 28.00$) than students in tourism ($M_t = 18$) and also a higher perceived level of academic burnout ($M_{md} = 41.30$; $M_t = 35$).

At the level of the entire sample, the correlation analysis revealed that the level of self-perceived stress correlated with the free recall memory from the text comprehension and retention during the first task (0.66). In general, our results confirmed prior research stating that digital multitasking affects comprehension, recall, and academic performance (Winneke et al., 2015) but revealed that the components least affected by multitasking were: retention of the quantitative data and qualitative data and logic coherence of the text performance and the most affected were text accuracy performance and free recall memory.

We also ran an analysis on a subsample of all students working a part-time or full-time job from both study programs, because in the general convenience sample, not all students had a job during their studies, some of them because they were enrolled in two study programs from the same university. They displayed a higher level of academic burnout ($M_{wb} = 41$) but a lower self-perceived stress level ($M_{ws} = 20$), ADHD symptoms ($M_{wAD} = 2.28$), and a higher overall academic performance in the first semester ($M_{wap} = 9.22$) than the average score in the entire sample.

5 Conclusion

The post-pandemic tourism labor market changed like never before due to the increasing ratio of technology involved. The continuous rise in technologisation increased the need for digital skills which created for the digitally native Generation Z the opportunity to access at a much younger age than before a part-time or a full-time job, during their studies. The omnipresence of computers in the classrooms and the ubiquitous presence of smartphones blur the separation between attending a lecture in higher education and working remotely in digital professions. Multitasking between stimuli during classes makes revisiting the issue of academic burnout and stress mandatory in tourism higher-education research.

Although the present study processed the data from the first two experimental stages, the premise from which it started proved to be justified. When students multitasked between reading a news and hearing a course lecture, the level of information retention, the logic coherence of text retained and the overall level of text comprehension and retention was lower during multitasking. Our findings confirmed prior research stating that digital multitasking affects comprehension, recall, and academic performance (Winneke et al., 2015) but revealed that the components least affected by multitasking were: retention of the quantitative data and qualitative data and logic

coherence of the text performance and the most affected were text accuracy performance and free recall memory. The effect on memory also confirmed previous findings that digital multitasking interfered with attention, working memory, negatively affecting recall, reading, and comprehension (May & Elder, 2018).

The performance in text comprehension and retention in the case of students enrolled in the tourism program was less affected in the case of lecture comprehension and retention and more affected in the case of the other task—in this study a professional news. In this particular experimental condition, the students from digital media had a total retention of information performed better, and their performance in the multitask condition was almost unchanged compared with the condition when they were exposed to a single stimulus. Previous literature debated in which condition multitasking has a positive impact and in which type of digital media combined affect less the performance. We must explore in the future if the more refined skills of reading, comprehension, and retention of news of students in digital media explained the majority of their variance in performance.

The experiment will continue with a third stage, in which the students will have to solve 3 tasks simultaneously. The results will be analyzed comparatively and progressively to observe how the values increase or decrease at the level of understanding the text, self-perceived stress, and burnout. Multitasking is a reality present in the current professional and personal context. The purpose of our study is to observe how well and at what cost the individual adapts to this reality.

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Analyzing the Organizational Factors that Influence Hotel Employees' Team Efficiency



Angelos Ntalakos, Dimitrios Belias, and Nikolaos Tsigilis

Abstract It is widely accepted in the academic community that the success of a hotel company depends to a large extent on the behavior of its employees. More specifically, hotel customers form their opinion about the hotel's services through their interactions with the several work teams of the hotel (such as front desk, house cleaning, and restaurant employees). Thus, the development and the existence of a hotel company are highly connected with the efficiency of its personnel. According to previous research, the effectiveness of hotel employees are strongly related to several organizational factors (such as leadership styles, communication, organizational culture, and training). The current paper aims to examine the key organizational factors that influence employees' effectiveness. The methodology that is used in this paper is literature review via the PRISMA method. Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) focuses on reporting the reviews as well as evaluating the effects of interventions that are connected with the key variables of leadership styles, organizational culture, communication, group dynamics, and team efficiency.

Keywords PRISMA analysis · Organizational factors · Group dynamics · Hotel industry · Team efficiency

JEL Classification M10 · M12

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1 Introduction

The organizational factors that can lead an organization to a successful outcome have always been concepts difficult to define. During the recent past years, several scholars and practitioners have focused to identify the factors that have a direct and positive effect on the increase of employees' team performance (Belias & Trihas, 2023a, 2023b; Belias et al., 2023a, 2023b, 2023c; Masouras et al., 2022; Ntalakos et al., 2022a, 2022b, 2023b; Rossidis et al., 2020; Viterouli & Belias, 2021; Viterouli et al., 2022, 2023).

The success of an organization that belongs to the tourism and hospitality industry is directly affected by the performance and the effectiveness of its employees to productively execute their duties.

Thus, human resource management (HRM) has to take into serious consideration the factors that would help the personnel to increase their performance especially when they are working in a teamwork environment, such as a hotel company (Belias & Trihas, 2022a, 2022b; Belias et al., 2015; Rossidis et al., 2021a, 2021b).

Despite the fact that some organizational factors (such as leadership, organizational culture, and communication) seem to have troubled several scholars, there are other organizational factors (such as group dynamics) that remain unstudied, especially when it comes to the hospitality industry.

In other words, there seems to be a huge literature gap both in theoretical and practical framework regarding the relationships between leadership, organizational culture, communication, group dynamics, and team performance-effectiveness as they are implemented on the hospitality industry.

The aim of the current paper is to highlight the importance of the above factors on the successful outcome of an organization in general and more specifically in a hotel company. For this reason the authors conducted a literature review via PRISMA methodology. This research consisted of five stages in order to examine the appropriate bibliography which is more connected to the aim of the study. In each stage, some papers were excluded until the authors had the final list of the 63 examined eligible papers. In the next sections of the papers, the researchers describe in details the methodology, the results, and the discussion of the PRISMA analysis outcome.

This research aims to trigger scholars and practitioners into creating a theoretical and practical model where all the above mentioned factors would combined so as to develop the appropriate environment for the growth of a hotel company.

2 Methodology

The methodology that was used in this research was literature review. In other words, a systematic review was carried out that was based on PRISMA methodology. PRISMA Analysis stands for Preferred Reporting Items for Systematic Review and Meta-Analyses. PRISMA focuses on the report of reviews regarding the impact of interventions as well as it can also be used as a basic report for systematic reviews with objectives regarding other items than evaluating interventions (Prisma-Statement, 2023). The purpose of PRISMA methodology is to plan and conduct systematic reviews to ensure that all recommended information is captured. However, PRISMA analysis is a tool that should not be used to measure the methodological quality of systematic reviews. Other tools, such as ROBIS or AMSTAR 2, are built for this purpose.

All data that were used on PRISMA Methodology were collected from high quality books, conference proceedings, papers and scientific journals that derived by the most famous scientific databases such as Science Direct, Google Scholar, Elsevier Scopus, Web of Sciences, and Semantic Scholar. Boolean operators were applied in order to combine different search queries (Hammerstrøm et al., 2009). The keywords that were used during the searching process were the following: “Leadership Styles”, “Leadership”, “Communication”, “Group Dynamics”, “Team Dynamics”, “Team Efficiency”, “Team Effectiveness”, “Organizational Culture”, “Communication Satisfaction”, “Leadership Communication”, “Communication Skills/abilities”, “Relationship”, “Effect”, “Impact”, “Organizational Factors”, “Organization”, “Tourism Industry”, “Hospitality Industry”, and “Hotel Industry”. Some of the Boolean operators that were implemented were the below: “OR”, “AND” (for instance “Leadership Styles AND Communication AND Group Dynamics AND Hotel Industry”).

The search process of the PRISMA Analysis was conducted during April–June 2023. The outcome of the search process revealed that 195 papers were found. Some of them should be included as eligible on this research, while others should be excluded. The exclusion criteria had to do with duplication, the written language, as well as untrusted source (as no link for the paper was either available nor a working one).

More specifically, from a total of 195 papers, 37 were excluded (due to untrusted source and duplicates) and 158 were accepted. Next, the researchers investigated thoroughly the titles, the keywords, the abstracts and the results of the remaining 158 papers for articles relevant to organizational examined factors. This narrowed the research on 95 papers.

Subsequently, the focus of the current research was placed on the above 95 papers. The researchers examined the eligibility of these papers according to their Research Objectives/Questions:

- *Q1: Are the retrieved papers fully or partially related to the organizational factors that influence the teamwork efficiency of hotel employees?*

- Q2: Are the theories, models and concepts related to the specific field explicitly mentioned?

Finally, 63 papers were accepted. Figure 1 describes the Flow Diagram of Template of PRISMA 2020 (Prisma-Statement, 2023) as it is implemented on the specific research. In the final phase, the diagram illustrates that 63 papers were thoroughly examined.

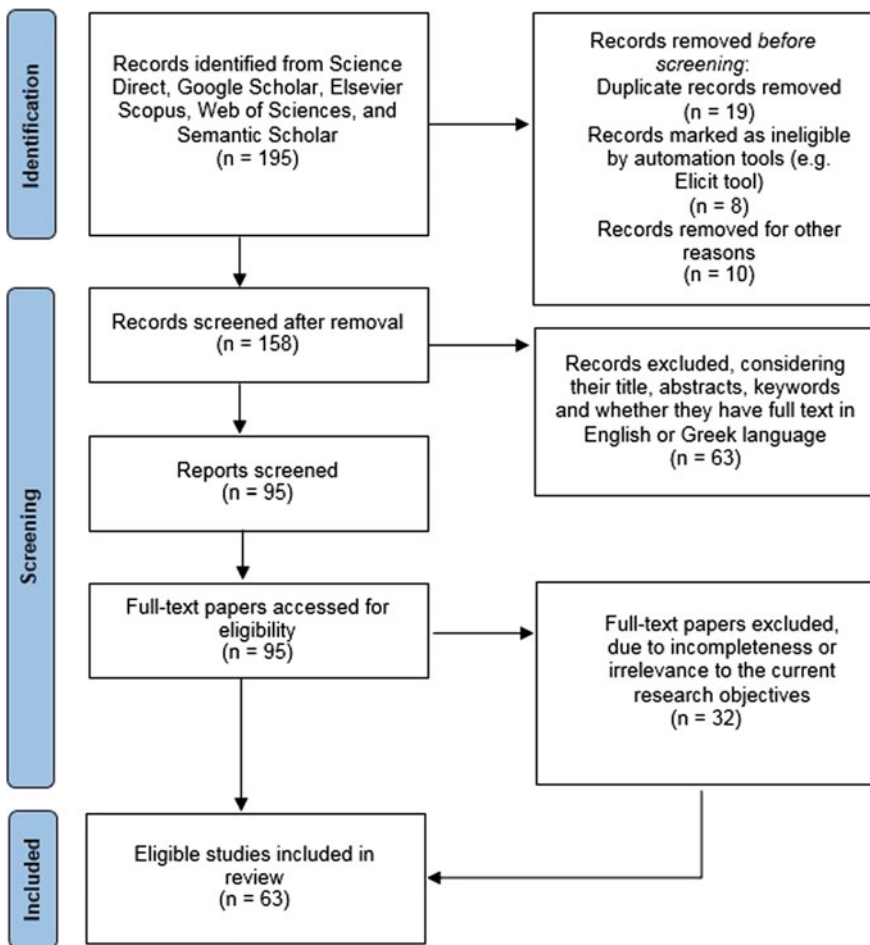


Fig. 1 PRISMA 2020 flow diagram indicating the relevant bibliography of the research

3 Results

3.1 Overview

According to Fig. 1, 63 eligible papers were thoroughly examined. The study of these papers was carried out via 5 stages. On the first stage (Stage 1), PRISMA flow diagram revealed that 63 studies met the research criteria that were based on the PRISMA methodology. Secondly (Stage 2), the researchers examined in detail the above eligible papers regarding their concepts, models, variables, instrument measurement tools, methodologies and attributions. Then, they produce a list of the relevant articles that would be used in the current analysis. On the next stage (Stage 3), the authors identified the five dimensions/variables/factors that dominate in this research. These variables are the following: (a) leadership (leadership styles), (b) organizational culture, (c) communication, (d) group dynamics (team dynamics), (e) team performance/effectiveness. On the next stage (Stage 4), the researchers calculated the appearance/coverage of the above variables in the literature that was studied. Finally (Stage 5), the Tables 1, 2 and 3 were created. These tables demonstrate the results of the review. Figure 2 describes all the stages of the research analysis.

3.2 Examined Variables/Factors

The study of the eligible papers highlights the presence of five key factors/variables: (a) Leadership (Leadership styles), (b) organizational culture, (c) communication, (d) group dynamics (team dynamics), (e) team performance/effectiveness.

More specifically, the connection between the concept of leadership and the effective performance of an organization has been concerning the scholars and the practitioners during the past decades. Leadership is regarded to be a process where the leader is looking for the participation of the subordinates so as the organization's goals would be achieved (Belias et al., 2023d; Bunmi, 2007; Nanjundeswasraswamy & Swamy, 2014; Ntalakos et al., 2023c). In today's complex and changing environment, a leader has to make crucial decisions regarding the leadership style that he/she should adopt for the appropriate development of the organization (Belias et al., 2022a, 2022b, 2022c; Ntalakos et al., 2022b). Some of the most common leadership styles that are investigated in this research bibliography is the below:

- **Transformational Leadership Style:** Transformational leaders aim to “transform” their subordinates in their mind and heart, inspire them, communicate to them the vision of the organization and help them to be a part of the values, concepts and principles that the leader and the organization represent (Bass, 1997). As a result, the employees feel more connected to the good of the team rather to their own self-interest (Nanjundeswasraswamy & Swamy, 2014).

Table 1 Eligible studies that included in the final review ($n = 63$)

No.	Variables	Subvariables	Methodology	Authors	Outcome
1	Organizational culture, group dynamics	Formation, cohesion, inclusion, structure, influence, power, performance, teams	Literature review	Ntalakos et al. (2023a, 2023b, 2023c)	Organizational culture is connected to group dynamics
2	Leadership styles, group dynamics	Transformational, transactional, laissez-faire	literature review	Ntalakos et al. (2023a, 2023b, 2023c)	Examination of the current literature regarding the relationship between organizational leadership styles and group dynamics in the tourism industry
3	Leadership, communication	Leadership styles, communication	Quantitative research	Hariandi et al. (2022)	Communication and leadership have partial effect on conflict
4	Leadership, communication	Transformational leadership, transactional leadership, laissez-faire leadership, communication skills	Quantitative research	Demirdag (2022)	Communication skills had indirect mediating effect on the relationship between leadership styles and twenty-first century skills
5	Leadership skills, communication skills	Transformational leadership, comprehensibility, listening, openness, feedback, empathy, non-verbal communication, paralanguage, manner	Quantitative research	Jankelova and Joniakova (2021)	The findings show strong direct effects of communication skills and the transformational leadership style of FLNMs on nurses' job satisfaction
6	Leadership styles, communication	Exploitative-authoritative, benevolent-authoritative, consultative, collaborative, communication patterns	Qualitative research	Kusumah and Fikri (2021)	Leadership style is centered on the characteristics of leaders with the most dominant leadership style is exploitive-authoritative because it is attached to the top leader

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
7	Leadership styles, communication	Servant leadership, transformational leadership, two-way communication	Quantitative research	Rabiul et al. (2021)	<i>The findings contribute to leadership development by investigating the mediation effects of two-way communication between two prominent leadership styles and subordinate level work engagement, drawing on the social exchange theory</i>
8	Leadership styles, communication	Autocratic, democratic, laissez-faire, downward, upward, horizontal, two-way, interactive communication	Quantitative research	AlOqla (2021)	<i>A significant positive effect of democratic leadership style was found on a communication method and a negative significant effect was found of autocratic leadership style and laissez-faire leadership style on communication method</i>
9	Leadership, communication	Transformational leadership, interpersonal communication satisfaction	Quantitative research	Prikshat et al. (2021)	<i>Interpersonal communication satisfaction and trust mediate the significant relationship between transformational leadership and follower growth satisfaction in job</i>
10	Leadership, culture, communication	Power distance, uncertainty avoidance, institutional collectivism, human orientation, performance orientation, assertiveness, gender egalitarianism, future orientation	Quantitative research	Paudel et al. (2021)	<i>Workplace communication plays crucial role for the effective functioning of an organization</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
11	Leadership, organizational culture	Leadership styles, innovation culture	Quantitative research	Conteras et al. (2021)	<i>The leadership style that dominates on these 50 hotels, focuses on human dimension while the innovation organizational culture of these hotels focuses on the dimensions of human and strategy</i>
12	Leadership, team-building	Humble leadership, project success, team—building, top management support	Quantitative research	Ali et al. (2020)	<i>Humble leadership is positively related to project success. Also, team-building partially mediates the relationship between humble leadership and project success</i>
13	Leadership style, organization culture, performance	Transformational, authoritative, participative, supportive, instrumental, ethical, charismatic, servant, organizational efficiency	Quantitative research	Murugan and Sujatha (2020b)	<i>There is a significant impact of both Leadership styles and organizational culture on organizational performance</i>
14	Leadership, communication, team performance	Transformational leadership, geographic dispersion, team communication	Quantitative research	Eisenberg et al. (2019)	<i>Transformational leadership is reducing the negative effects of dispersion in collocated teams or ones with low levels of geographic dispersion</i>
15	Leadership, communication	Transformational, transactional leadership styles, communication styles	Quantitative research	Crews et al. (2019)	<i>Leaders can utilize a specific communication style to enhance the relationship with subordinates. This could encourage communication behavior for improved organizational outcomes</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
16	Leadership, communication, teamwork	Managerial leadership, communication roles, teamwork effectiveness	Literature review	Giudici and Filimonau (2019)	<i>Leadership capacity of managers correlates with their personal and interpersonal competencies</i>
17	Leadership, organizational culture	Islamic organizational culture, spiritual leadership	Quantitative research	Mariyanti et al. (2019)	<i>The findings indicate the importance of spiritual leadership and Islamic organizational culture on improving performance for Islamic hotels</i>
18	Group dynamics, communication, team effectiveness	Teamwork, information dimension, relational dimension, group loyalty, group conflict, group readiness for work, group work, group termination	Quantitative research	Mohanty and Mohanty (2018)	<i>Organizational development and intervention strategies are suggested to enhance teamwork effectiveness in the service sector</i>
19	Leadership, communication	Task-oriented behavior, relationship-oriented behavior, communication skills	Quantitative research	Tri and Udin (2018)	<i>Leadership styles and communication skills have a significant effect on employee satisfaction</i>
20	Leadership styles, team effectiveness	Transformational, transactional, laissez-faire leadership, team effectiveness	Literature review	Gross (2018)	<i>Linking leadership styles with virtual team effectiveness</i>
21	Organizational culture, team performance	Management culture, organizational performance, management-team performance	Quantitative research	Guchait et al. (2018)	<i>Results indicated that general managers' perceptions of organizational error management culture had a significant impact on all outcome variables</i>
22	Leadership styles, organizational culture, team motivation	Authoritarian, democratic, laissez-faire, dynamic, organizational culture dynamics	Literature review	Rahbi et al. (2017)	<i>Leadership styles with team motivation are importance in employee performance and retention in the long term</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
23	Communication, team performance	Communication frequency, quality, content	Literature review	Marlow et al. (2016)	<i>This paper delineates which aspects of communication are most influential</i>
24	Leadership styles, workplace communication	Authoritarian, democratic, laissez-faire, bureaucratic, job satisfaction, burnout	Quantitative research	Kelly and MacDonald (2016)	<i>The purpose of this study was to investigate leadership styles as related to solidarity communication</i>
25	Team effectiveness, employee performance	Effective communication, level of trust, interpersonal skills, team cohesive, accountability, leadership	Quantitative research	Salman and Hassan (2016)	<i>Efficient communication, level of trust, leadership and accountability have a positive and significant impact on employee performance</i>
26	Leadership, organizational culture	Organizational culture, diversity management perceptions	Quantitative research	Sezerel and Tonus (2016)	<i>This research which is conducted in a hotel chain finds that the mission dimension of organizational culture impacts all three levels of diversity management</i>
27	Leadership, communication, team performance	Transformational, team communication, task/creative performance	Quantitative research	Boies et al. (2015)	<i>The results provide evidence for a sequential mediation model where leadership influences team outcomes through overall team communication and trust in teammates</i>
28	Leadership styles, team behavior	Transformational, transactional, laissez-faire leadership, team response	Quantitative research	Hu et al. (2015)	<i>Transformational leadership is associated with improved team behavior</i>
29	Team cohesion	Cohesion conceptualization, measurement, measurement focus, cohesion dimension	Literature review	Grossman et al. (2015)	<i>The findings suggest that there simply is not one way that most effectively measures cohesion. The best technique will take into account what cohesion is being linked to</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
30	Leadership styles, employees performance	Transformational, transactional, non-transactional, effectiveness, satisfaction	Quantitative research	Quintana et al. (2015)	<i>Idealized attributes of transformational leadership and “contingent reward” from transactional leadership are the most important factors that positively affect employees performance</i>
31	Organizational culture	Adhocracy, Klan, bureaucracy and market	Quantitative research	Oz et al. (2015)	<i>The findings suggest that the mean values of the organizational culture types are higher; however, there are no clear differences among culture types</i>
32	Leadership styles, organizational cultural	Transformational, transactional, laissez-faire, adhocracy, Klan, bureaucracy and market	Quantitative research	Belias and Koustelios (2015)	<i>Results showed that there is a difference between the dominant (hierarchy) and the preferred culture types (adhocracy and clan), which is proportional to the relationship between leadership style and job satisfaction of employees</i>
33	Organizational culture, team performance	Cross-cultural, team performance	Quantitative research	Sucker and Cheung (2015)	<i>The results indicate that cross-cultural competency had a positive, direct effect on team performance</i>
34	Leadership, communication	Communication styles, personal trust, working conditions, leadership stability, quality of professional training	Qualitative research	Raducan and Raducan (2014)	<i>Communication represents the most important link in the performance of a company</i>
35	Leadership, communication	Transformational leadership, communication channels, internal communication	Quantitative research	Men (2014)	<i>Transformational leaders most often use face-to-face channels to communicate with followers</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
36	Leadership, communication	Transformational leadership behavior, Transactional leadership behavior, communication satisfaction	Quantitative research	Terek et al. (2015)	<i>Leadership has greater influence on the communication satisfaction of male teachers than female teachers</i>
37	Leadership styles, employee performance, communication	Transformational leadership style, communication skills	Literature review	Memon (2016)	<i>This research exhibits the relationship between Leadership Styles and Employee Performance through the mediating role of Culture and Gender. In addition communication plays the moderating role</i>
38	Communication	Communication satisfaction, communication credibility	Quantitative Research	Saurabh and Chattopadhyay (2013)	<i>The results revealed a significant impact of communication credibility on communication satisfaction</i>
39	Leadership, communication	Leadership behavior, communication satisfaction, communication openness	Quantitative research	Zhang et al. (2013)	<i>Empowering leadership behavior has a positive impact on communication satisfaction</i>
40	Leadership styles, organizational culture, effectiveness	Interaction facilitation, Task facilitation, goal emphasis, consideration, organizational outcome	Quantitative research	Klein et al. (2013)	<i>The leadership skills of managers and supervisors are critical factors in the creation and reinforcement of cultural norms. Furthermore, cultural norms seem to positively impact organizational effectiveness</i>
41	Leadership, team dynamics, team performance, team effectiveness	Leadership processes, shared leadership, cognitive, motivation	Qualitative research	Barnett and McCormick (2012)	<i>Complex environmental events necessitated a shift from single leader to team centered leadership</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
42	Leadership, communication	Communication styles, transformational, transactional, and servant leadership	Qualitative research	Rogers (2012)	<i>Leadership is a working component of every job and it is important for people to become as educated as possible about their own communication style</i>
43	Leadership styles, communication	Transformational leadership, interactive leadership, individual oriented leadership, communication competency	Quantitative research	Cetin et al. (2012)	<i>Interactive leadership style and communication competency have a strong relationship with job satisfaction</i>
44	Leadership styles, communication skills	Democratic leadership	Quantitative research	Temel et al. (2011)	<i>The democratic leadership style leaves a positive impact on morale and satisfaction. Thus, a high correlation was found between leadership behavior and communication skills</i>
45	Communication	Communication styles	Literature review	Hicks (2011)	<i>This research has demonstrated that inappropriate communication may decrease employee satisfaction</i>
46	Leadership styles, teamwork quality	Task conflict, relationship conflict, communication, coordination, planning, relations oriented leadership, task-oriented leadership	Quantitative research	Curseu (2011)	<i>Relationship oriented leadership is beneficial for dealing with relationship conflict, but it does not have the expected positive interaction effect with task conflict</i>
47	Leadership, communication	Communication styles, charismatic, human—oriented, task—oriented leadership	Quantitative research	Vries and Bakker-Pieper (2010)	<i>The charismatic and human-oriented leadership are mainly communicative, while task-oriented leadership is significantly less communicative</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
48	Leadership, team dynamics	Team formation and assembly, leadership dynamics, team performance and maintenance, team dynamics	Literature review	Yammarino et al. (2010)	An interdisciplinary, multilevel model of leadership and team dynamics for dangerous military contexts is presented
49	Team building, team performance	Goal setting, interpersonal relations, problem solving, role clarification	Quantitative research	Klein et al. (2009)	Team building has a positive moderate effect on team's outcomes
50	Strategic groups, organization development	Size, chain affiliation, category	Quantitative research	Claver-Cortes et al. (2009)	The strategic groups revealed that the highest performance levels are achieved by larger-sized, chain-affiliated, and higher-category hotels as well as by establishments which base their competitive advantage on category and capacity or size and internal management
51	Leadership, team cohesion, performance	Transformational leadership, cohesion, performance level	Quantitative research	Callow et al. (2013)	The leadership behaviors foster the acceptance of group goals and promote team work, high performance expectations, and individual consideration
52	Communication, Organizational culture	Rule oriented culture, mission-oriented culture	Quantitative research	Garnett et al. (2008)	Communication acts as a meta-mechanism for shaping and imparting culture in mission-oriented organizational cultures. Thus it influences the performance

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
53	Communication	Communication satisfaction, motivation	Quantitative research	Chiang et al. (2008)	<i>The results suggest that employees who are highly satisfied with communication respond more positively toward motivation components, and they are more likely to perform well in their job when they are motivated</i>
54	Culture, leadership	National culture, leader categorization	Quantitative and qualitative research	Testa (2007)	<i>The results suggest that this is a highly complex issue, which can have a significant impact on employee reactions their leaders and the service received by guests</i>
55	Group dynamics	Intergroup, intragroup performances	Quantitative research	Claver-Cortes et al. (2006)	<i>The results show how the level of performance can be evaluated by strategic groups</i>
56	Leadership, team dynamics, team performance	Leadership modes (emerging, rotating designated), team dynamics	Quantitative research	Markulis and Jassawalla (2006)	<i>The authors found that emerging leaders are least effective, while designated and rotating leaders are most effective for fostering differing types of team dynamics</i>
57	Team effectiveness	Team task, team processes, team effectiveness	Literature review	Kozlowski and Ilgen (2006)	<i>To identifying interventions, or "levers," that can shape or align team processes and thereby provide tools and applications that can improve team effectiveness</i>
58	Group dynamics	Cohesiveness, altruism, universality	Quantitative research	Phan et al. (2004)	<i>Group dynamics inventory tool</i>

(continued)

Table 1 (continued)

No.	Variables	Subvariables	Methodology	Authors	Outcome
59	Leadership, relative validity	Transformation and transactional leadership, Laissez-faire, job satisfaction, job performance, job motivation	Quantitative research	Judge and Piccolo (2004)	<i>Transformational and contingent reward leadership generally predicted criteria controlling for the other leadership dimensions, although transformational leadership failed to predict leader job performance</i>
60	Leadership, team performance, communication	Transformational leadership, cohesion, conflict management	Literature review	Dionne et al. (2003)	<i>Inspirational motivation, intellectual stimulation and individualized consideration could produce intermediate outcomes such as shared vision, team commitment, an empowered team environment and functional team conflict</i>
61	Leadership, team effectiveness	Transformational leadership, team empowerment	Quantitative research	Ozaralli (2002)	<i>This study found significant correlations between transformational leadership, empowerment, and team effectiveness</i>
62	Leadership styles, organizational culture, performance	Competitive, innovative, bureaucratic, community culture, participative, supportive, instrumental leadership, performance	Quantitative research	Ogbonna and Harris (2000)	<i>This paper presents empirical evidence which suggests that the relationship between leadership style and performance is mediated by the form of organizational culture that is present</i>
63	Communication, productivity	Communication climate, supervisory communication, organizational integration, media quality, co-worker communication, corporate information, personal feedback, subordinate communication	Quantitative research	Clampitt and Downs (1993)	<i>Communication was perceived to have an impact on productivity</i>

Table 2 Indicator of appearance for each variable

Variables/Factors	Frequency (number of papers)	Percentage on the total amount of papers (%)
Leadership (1)	46	73.02
Organizational culture (2)	14	22.22
Communication (3)	32	50.79
Group dynamics (4)	14	22.22
Team performance/ effectiveness (5)	22	34.92

Table 3 Indicator of coverage for each of the four dimensions on the papers regarding team performance/effectiveness

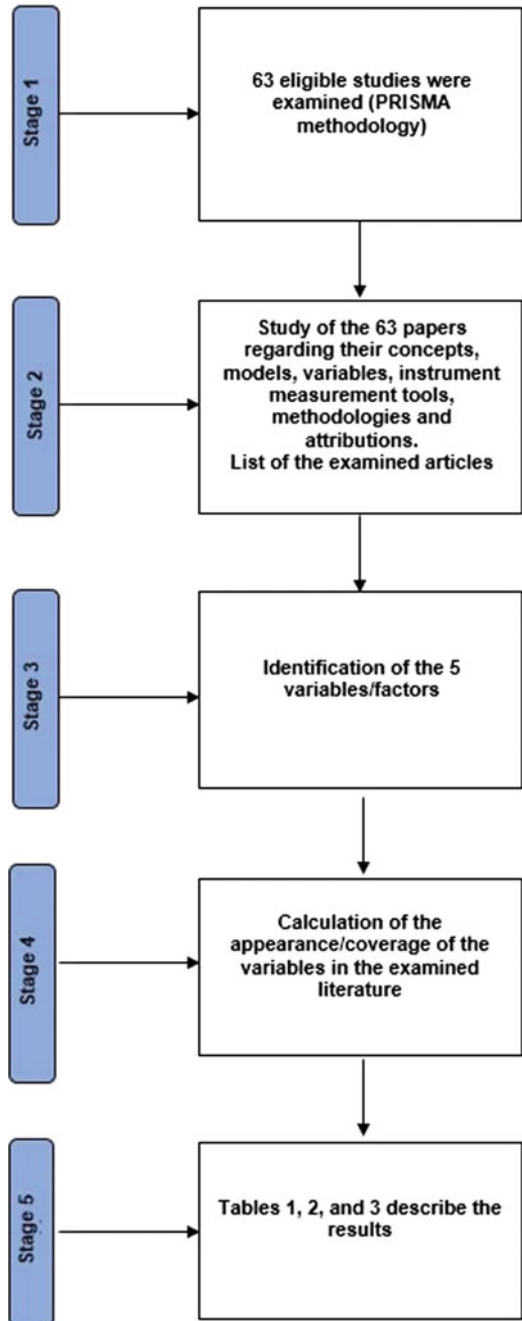
Variables/factors	Frequency (number of papers)	Percentage on the amount of papers regarding team performance/ effectiveness (%)
Leadership (1)	13	59.09
Organizational culture (2)	6	27.27
Communication (3)	6	27.27
Group dynamics (4)	4	18.18

- **Transactional Leadership Style:** Transactional leaders focus on the connection between performance and reward. In other words, this type of leaders are rewarding the subordinates who excel at their working duties, encouraging them to continue to improve their performance (Scott, 2003).
- **Laissez-faire Leadership Style:** Laissez-faire leaders are described by lack of leadership (Avolio, 1999). According to Karip (1998), this type of leadership is risky due to the fact that the subordinates have access to unlimited freedom. Most of the laissez-faire leaders lack in abilities and skills, and most of the times are afraid to make any decision (Demirdag, 2022).

The second key factor of this research is described by the term organizational culture. Organizational culture is defined as a set of values, beliefs, behaviors, social attitudes that represent the whole behavior of an organization (Oz et al., 2015). According to recent studies, organization culture is strongly related to the employees' performance/effectiveness as it can improve their abilities/skills, efficiency and commitment to the organization (Obeng & Ugrboro, 2003; Oz et al., 2015). Some of the most reported sub-variables (dimensions) of organizational culture that are examined in this literature review, are based on Cameron and Quinn's model (2006):

- **Clan Culture:** This type of organizational type is associated with the internal processes where organizations demonstrate flexible structure. The clan culture

Fig. 2 The study process of the research via five stages



is implemented on organizations where shared values behaviors and targets are dominant.

- **Bureaucracy Culture:** This type of organizational type is associated with the hierarchical structure. The organization is kept together via formal rules and regulations. The bureaucracy culture is observed on big institutions.
- **Market Culture:** This type of organizational type is associated with the market structure. The key element of the organization that applies the Market culture is the sense of winning. In other words, the market culture focus on the success of the organizational goals and targets as being the basic purpose of the organization.
- **Adhocracy Culture:** This type of organizational type is associated with organization's fast reactions in the competition conditions. Adhocracy culture gives priority to the following elements: suggestions on innovative ideas for developing new products, empowering the creativity of the managers.

Furthermore, communication is strongly connected with team's satisfaction which can lead to the development of team's performance (Vries et al., 2010). Satisfaction is usually associated with a friendly communication style which can determine team performance (Srivastava et al., 2006). One of the most important dimensions of communication is communication satisfaction. Communication satisfaction is defined by the way that the employees feel about the communication efforts are applied on an organization (Downs & Hazen, 1977). Similarly, Pace and Faules (1994) propose that communication satisfaction may have a direct impact on the desired outcome on an organization. Some of the sub-dimensions that are regularly appear in the examined papers are the following: communication climate, relationship to superiors, relationship with subordinates, media quality, and horizontal and informal communication.

Another factor that seems to "play an important role" on the successful outcome of team's performance is group dynamics. Effective group dynamics include clear aim/purpose, open communication, high levels of support, trust, engagement, and acceptance (Greenlee & Karanhxa, 2010; Johnson & Johnson, 2003). One of the most appreciated dimension of group dynamics is group cohesion/cohesiveness. Group cohesion is defines as the degree to which the members of a team are committed to remain as a part of the team (Shaw, 1976). According to Bettenhausen (1991), team cohesion is associated with team satisfaction, productivity, and member interactions.

Last but not least, team performance is defined through an organized procedure that included inputs, process, and outcomes. These processes are directly connected with the quality of interpersonal relationships. Some of the dimensions of these interpersonal relationships are associated with communication, team cohesion, and conflict management (Dionne et al., 2003; Klimoski & Mohammed, 1994).

Table 1 describes in detail, all the variables and sub-variables (dimensions) that are examined in the 63 proposed papers that were revealed through PRISMA methodology.

3.3 Appearance of the Variables

Subsequently, in the next stage of the research, the authors calculated the indicator of appearance of each of the mentioned variables on the examined bibliography. The indicator of appearance $Ap_{(x)}$ represents the percentage of each variable/factor that appears in the available eligible bibliography that is studied on the specific research, as it is introduced by Dervenis et al. (2022). The indicator's mathematical type is defined as follows:

$$Ap_{(x)} = \frac{n_{(x)}}{\text{sum}} \%,$$

where

$Ap_{(x)}$ = percentage of appearance of the x variable in the sum of papers.

x = represents the five variables $x = 1, \dots, 5$.

$x = 1$, represents Leadership Styles.

$x = 2$, represents Organizational Culture.

$x = 3$, represents Communication.

$x = 4$, represents Group Dynamics.

$x = 5$, represents Team Performance/Effectiveness.

$n_{(x)}$ = number of papers indicating the appearance of variable x .

sum = total number of eligible papers that examined on the research ($n = 63$).

For example, the indicator of appearance of the variable $i = 1$ (leadership styles) can be measured as follows:

$$n_{(x=1)} = 46$$

$$\text{sum} = 63$$

$$Ap_{(x=1)} = \frac{n_{(1)}}{\text{sum}} \% = \frac{46}{63} \% = 73.02\%$$

Table 2 describes the indicator of appearance of each of the five dimensions of the specific research.

In addition, the researchers calculated the indicator of coverage of each of the four variables (leadership styles, organizational culture, communication, and group dynamics) on the papers that contain the term (variable) of team performance/effectiveness, as it is introduced by Dervenis et al. (2022). The indicator of appearance $Covr_{(x)}$ represents the percentage of each variable/factor that appears in the papers regarding the variable of team performance/effectiveness. The indicator's mathematical type is defined as follows:

$$Covr_{(x)} = \frac{m_{(x)}}{\text{sum}_{pe}} \%,$$

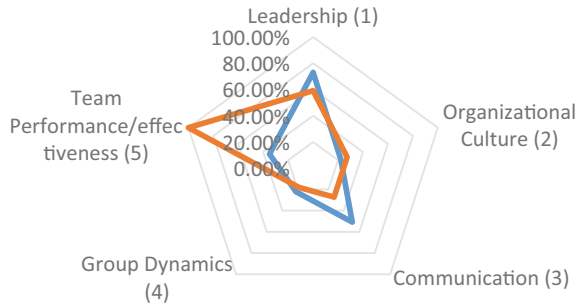
where

$Covr_{(x)}$ = percentage of appearance of the x variable in the papers of team performance.

x = represents the four variables $x = 1, \dots, 4$.

$x = 1$, represents Leadership Styles.

Fig. 3 Radar chart for indicators of appearance and coverage



$x = 2$, represents Organizational Culture.

$x = 3$, represents Communication.

$x = 4$, represents Group Dynamics.

$m_{(x)}$ = number of papers indicating the appearance of variable x .

sum_{pe} = total number of papers that examined the variable team performance/effectiveness ($n = 22$). For example, the indicator of coverage of the variable $i = 1$ (Leadership Styles) can be measured as follows:

$$m_{(x=1)} = 13$$

$$sum_{pe} = 22$$

$$Covr_{(x=1)} = \frac{m_{(x=1)}}{sum_{pe}} \% = \frac{13}{22} \% = 59.09\%$$

Table 3 describes the indicator of coverage of each of the four dimensions on the variable of team performance/effectiveness. The radar chart (Fig. 3) illustrates the indicators of appearance and the indicators of coverage for each variable (the blue line represents the indicator of appearance, while the orange line represents the indicator of coverage).

3.4 Analyzing Leadership Styles, Organizational Culture, Communication, Group Dynamics, and Team Performance/Effectiveness on the Hospitality Industry

According to Table 1, PRISMA methodology has revealed that leadership styles, organizational culture, communication and group dynamics are some of the most crucial factors that can determine the performance and the effectiveness of an organization's teamwork. Some of the organizations that are examined in these 63 papers belong to the hospitality industry. Sadly, the number of the papers that are referred to

the hospitality industry are very limited. Thus, this PRISMA methodology literature review aims to indicate this literature gap.

At first, Claver-Cortes et al. (2009) have raised the differences in performance regarding the strategic groups that are applied on the hotel sector. The authors have revealed that the highest performance levels are achieved by larger-sized, chain-affiliated, and higher-category hotels. Similarly, Claver-Cortes et al. (2006) have pointed out (on a previous research) that strategic groups have been used as a tool that can help to understand in a better way the complexity that exists in the hotel industry.

In addition, Mohanty and Mohanty (2018) suggest that group dynamics have a positive and significant effect on teamwork effectiveness. The outcome of their research on 97 hotel employees showed that 71.4% of the variance of teamwork effectiveness is interpreted through the dimensions of group dynamics (such as group loyalty, group conflict, group readiness for work, group work, and group termination).

Furthermore, Chiang et al. (2008) investigating the moderating role of communication satisfaction on the hotel employees' motivation. More specifically, their quantitative research on 289 hotel employees revealed the hotel's staff who are mostly satisfied with the communication level, respond more positively toward motivation characteristics, and they are more likely to perform well in their job duties.

Next, Rabiul et al. (2021) conducted a quantitative research on a sample of 391 hospitality employees on the Bangladesh hotel industry. The findings of their research showed that two-way communication has a significant effect on the linkage between servant leadership and work engagement, whereas it seems that two-way communication has no impact on transformational leadership and work engagement.

Prikshat et al. (2021) investigated the connection between transformational leadership, interpersonal communication satisfaction and trust. Their sample consisted of 159 hotel employees in India. According to Prikshat et al. (2021), the employees' interpersonal communication satisfaction and trust play a mediating role on the connection between transformational leadership and employees' job satisfaction.

Another important research was conducted by Guchait et al. (2018) on 148 general managers who worked on 148 hotels in China. The results of this quantitative survey suggested that general manager's perceptions on management culture had a significant effect on management team performance and creativity. Additionally, management team learning behaviors mediates the above linkage.

Moreover, Paudel et al. (2021) investigated the cultural diversity impact on hospitality industry leadership. Data were collected by 10 five star hotels in Kathmandu Valley (167 hotel employees participated on this quantitative research). The findings of the research revealed that effective communication can help managers to set and achieve goals while the coordinate the employees to work in teams which can be very important in order for the subordinates to feel secure.

Additionally, Sucker and Cheung's (2015) research on 738 employees, who worked on 6 multinational hotels in Thailand, revealed that cross-cultural competency had a significant positive and direct effect on team performance.

Similarly, Testa (2007) investigate the way that hotel employees evaluate their leader's behavior based on his/her national culture. The sample of his research

consisted of 150 US hospitality employees. The findings of this research showed that this is a high complex issued, that can directly affect employees reactions to the leaders and to the service received by guests.

Quintana et al. (2015) examined the impact of leadership styles on hotel employees' efficiency and satisfaction with their managers. Their sample consisted of 191 employees who worked on 11 four star hotels in Spain. The outcome of this study showed that transformational and transactional leadership are the most important factors that have a positive effect on employees' efficiency, effort, and satisfaction.

Oz et al.'s (2015) research was conducted on 335 employees who worked on five-star hotels on Turkey. They investigated the type of organizational culture on these five-star hotels. The results of their study revealed that while the mean values of the organizational culture types are higher, there are no clear differences among culture types.

Another research was conducted on 50 hotels in the Bucaramanga Metropolitan Area (Contreras et al., 2021). According to the researchers, the leadership style that dominates on these 50 hotels, focuses on human dimension while the innovation organizational culture of these hotels focuses on the dimensions of human and strategy.

Sezerel and Tonus (2016) investigated the effects of the organizational culture on diversity management perceptions. According to their research on a sample of 293 hotel employees in Turkey, the mission dimension of organizational culture has an impact of all three levels of diversity management.

Finally, Ntalakos et al., (2022a, 2022b, 2023a, 2023b, 2023c) have revealed the huge literature gap that exists on the linkage between leadership styles, communication, organizational culture, and group dynamics regarding the hotel industry.

4 Conclusions

This paper is literature review based on PRISMA methodology. Via this method, 63 papers, from a total of 195 papers, were described as eligible and were thoroughly studied. As a result a multi-dimensional approach to hotel employees' team effectiveness and performance was identified. This approach consists of five principle factors (dimensions) that have direct effect on each other. These variables are the following: leadership, organizational culture, communication, group dynamics, and team performance/effectiveness. The above factors contain a plethora of sub-dimensions (sub-variables), such as transformational leadership, transactional leadership, Laissez-faire leadership, clan culture, market culture, adhocracy culture, bureaucracy culture, communication satisfaction, communication skills, group cohesiveness, team efficiency, and team productivity.

Eventually, PRISMA methodology revealed the majority of papers which are connected with team performance/effectiveness contain the variables of leadership

and communication, whereas there seems to be a huge literature gap regarding the connection of group dynamics with the other organizational factors. This literature review focused on highlighting the gap that exists both theoretically and practically on the investigation of these five factors in the hotel industry.

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Job Satisfaction Factors in the Greek Hotel Industry, in the Post-COVID Years. The Significance of Knowledge



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Abstract In the post-COVID years, the growth of tourism in Greece was rapid. This growth created a strong demand for employees, especially in the hotel industry, which could not be met. In 2022, the year following the pandemic, 60,200 jobs, based on the organization charts of hotels in Greece, were not occupied due to shortage of staff. This paper presents the results of a research that aimed to discover the factors that lead to job satisfaction, of the hotel personnel in Greece. In this context, based on the literature, many factors were examined, which contribute to job satisfaction such as working conditions, salary, company policy and administrative style, completion through work, relations with colleagues, and other factors. Emphasis was placed on the link between the level of knowledge and experience of staff and the job satisfaction. The level of satisfaction was also related with other factors such as position of responsibility, seasonality of the job, the training provided, but also the level of quality of the hotel's services. The research was pilot and intended to indicate the directions and fields for a larger future research on the specific questions. The survey was conducted in spring 2023 and the results showed that the lowest degree of Job satisfaction was the salary in relation to the work offered, but also the opportunities given for promotion or advancement in the company. The satisfaction level for these factors was lower among the female employees. The best level of job satisfaction was for the social environment, such as relationships with colleagues and supervisor. Also, the research showed that there is a strong relationship between the quality of the hotel and the level of employee satisfaction. In any case, hotels in Greece should improve their working conditions and policy towards employees in order to increase the level of job satisfaction of employees, especially those who are in the lower positions and assistant employees.

Keywords Hotel · Job satisfaction · Knowledge · Quality · COVID · Greece

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1 Introduction

The hospitality industry in Greece is one of the most vital sectors of the economy in the country and the hotels playing a key role in tourism, providing accommodation and services to travelers. The quality of hotel services has a direct impact on customer satisfaction and consequently on the success and reputation of the hotel. One of the key factors contributing to quality service is the job satisfaction of hotel employees.

In 2019 the arrivals of foreign visitors in Greece amounted 31.3 million. In the next two years due to the COVID pandemic, the arrivals decreased dramatically, recording a decrease of -76.4% in 2020 and -53.1% in 2021 compared to 2019. In 2022, traveler arrivals amounted 27.8 million and almost doubled from the previous year, which was 14.7 million. The phenomenon of decreased tourist traffic, especially in the years 2020 and 2021, led many tourism employees to look for employment in other sectors.

As a result, due to the rapid recovery of tourism in 2022, this resulted in many shortages in staff in the tourism sector and especially in staff in the hotel industry in Greece. According to a survey conducted by the Research Institute for Tourism (2023) in the year 2022, out of a total of 262,981 jobs provided by the organization charts of hotels in Greece, 23%, i.e., 60.2 thousand positions remained unoccupied.

The percentage of deficiencies is evenly distributed across almost all departments and ranges from 21 to 24%. In fact, the lack of staff in seasonal hotels is four times higher than the shortage in hotels of continuous operation. Specifically, seasonal hotels have 47,607 shortages, corresponding to 79% of the total, compared to hotels that have 12,619 shortages, which corresponds to 21%. To the problems created by the Pandemic in the labor market in the years 2020 and 2021, we should add the poor working conditions, but also the seasonality of employment that create additional problems in finding the necessary staff for hotels. However, the main reason for staff shortages in the hotel industry in the post-COVID era is due to the rapid increase recorded in tourist arrivals in Greece after 2012, which created a large increase in jobs in tourism.

To understand the tourist boom in arrivals, it should be noted that from the early 1960s to the beginning of 2010 (i.e., over half a century); the number of tourists in Greece gradually reached about 15 million (2005: 14.4 mil., 2010: 15.0 mil.). On the contrary, between 2012 and 2019, arrivals jumped from 15.5 million (in 2012) to 31.3 million (in 2019), i.e., within seven years arrivals to Greece increased in size as much as they had increased over the last 50 years. This increase in tourist traffic has created a great demand for human resources, which, however, is difficult to cover by the available staff in Greece. This research aims to investigate the satisfaction factors of hotel employees in Greece. Based on the relevant literature, various factors of job satisfaction were examined, such as working conditions, company policy and

administrative style, salary, completion through work, relations with colleagues, and other factors.

Particular emphasis was placed on the personal characteristics of employees and whether the level of education and experience affects the level of satisfaction, because it was expected, that the best trained and experienced employees in hotels will having less work stress, which in turn would lead to greater job satisfaction. The survey was conducted on a pilot basis among 100 professional employees of the hotel industry (mostly in different hotels) from all over Greece and aimed to highlight satisfaction factors.

2 Job Satisfaction and Key Indicators

Job satisfaction can be defined as a person's emotional orientation toward their current work role and is related to the person's behavior in the workplace, thus expressing feelings of joy or dissatisfaction at work (Singh & Onahrng, 2019). Increasing job satisfaction can improve service quality, job performance, external stakeholder satisfaction, organizational engagement, and organizational behavior (Ezzat & Ehab, 2018). Job satisfaction means doing the job you love, doing it well and being rewarded for your own efforts (Aziri, 2011). In general, job satisfaction is an essential element that motivates employees and encourages them to achieve better results (Raziq & Maulabakhsh, 2015). Ostroff (1992) notes that employee satisfaction is of great importance not only for employees but for the entire organization because satisfied employees are usually happy and motivated to work, so the organization can get amazing results from their work. On the other hand, disgruntled employees will not be encouraged and bothered by their work routine, flee, or try to avoid work. In addition, employee engagement is closely linked to worker escaping rates, so it can be assumed that by increasing job satisfaction for employees, including decent wages, stable work, interpersonal relationships, and easy access to benefits (salary and social security), the company will also have a low rate of employee resignations (Ezzat & Ehab, 2018).

Job satisfaction can initially be classified into three main categories, namely internal satisfaction, external satisfaction, and overall satisfaction (Skelton et al., 2019). Internal satisfaction is related to the nature of work and correlates with a sense of feedback, self-esteem, accomplishment, and a sense of control. External satisfaction is more about comparison between individuals, which refers to the nature of work related to employee happiness from the work environment, recognition and praise from superiors, benefits, good salary, and opportunities for promotion/advancement. Total satisfaction refers to employees' overall job satisfaction and is measured by a combination of internal and external satisfaction (Ezzat & Ehab, 2018).

According to Roelen et al. (2018), there are seven key indicators of job satisfaction, such as task variety, colleagues, working conditions, workload, autonomy, education and development opportunities, person–environment fit. The indicators from the Sixth European Working Conditions Survey are similar, which includes the

dimensions of the European Job Quality Index developed by Parent-Thirion et al. (2016). This index is formed of seven dimensions that determine working conditions: earnings, prospects, social environment, physical environment, work intensity, skills and discretion, and work time quality. (Díaz-Carrión et al., 2020) All the constructs used in the analysis except salary (expressed in euros) and job satisfaction (expressed on a four-point Likert scale) are numerical variables expressed on a scale of values between 0 and 100. According to Parent-Thirion et al. (2016), the constructs were defined as follows. **Earnings:** The importance of earnings as a motivational factor has been widely studied in the literature (Suzuki et al., 2018). **Prospects:** This refers to the job characteristics that contribute to a person's material and psychological needs, encompassing the need for income and for employment continuity. Employees who are not satisfied with advancement opportunities are more likely to leave the company (Abdelmoula & Boudabbous, 2019). **Skill and Discretion:** This dimension refer to the skills required for the job and the level of job autonomy. **Social Environment:** This dimension measures the social support perceived by employees (good social relations with line managers and fellow workers). Pignata et al. (2017) found that supportive colleague connections act as a protective medium against stressful work activities and situations in their qualitative study, while according to Aalto et al. (2018), “good team climate and collegial support were related to decreased distress and sleep quality and enhanced workability”. **Physical Environment:** This dimension refers to environmental hazards and to factors related to posture-related risks, which become relevant factors in the health of employees, a fundamental aspect of job hygiene and satisfaction (Devonish, 2018; Koh et al., 2018). **Work Intensity:** This dimension refers to the intensity of work demands. High work intensity is associated with a risk of suffering high levels of occupational stress, which in turn is associated with low levels of job satisfaction (Iranmanesh et al., 2017; Rushton et al., 2015). **Work Time Quality:** This dimension refers to the organization and length of working time. The number of working hours, shift work, night work, etc., are determinant for the achievement of a good work/life balance, subsequently playing a significant role in job satisfaction (Eagan et al., 2015; Roy, 2017).

3 Job Satisfaction in the Hotel Industry

Customer satisfaction and employee satisfaction in the hospitality sector has been the subject of many surveys (Abukhalifeh & AlBattat, 2017; Kansal, 2012; Pupo & Garcia, 2014; Rahman et al., 2015; Singh et al., 2017; Worsfold et al., 2016). The characteristics of the hospitality industry create a context in which it is not surprising that there are many challenges to providing fair work. The workforce is mostly young, low-skilled and without a trade union. Pay is generally low and jobs are often insecure. Women, migrant, and part-time workers are over-represented. The sector is largely made up of small and very small enterprises, which generally operate with very narrow profit margins. These key issues are aligned with the dimensions of fair work that have emerged in the Fair Work Convention (2022). In particular, (a)

Union membership has historically been very low in the hospitality industry, with only 7% of hospitality workers seeing their pay set through a collective bargaining agreement. (b) Hospitality has the lowest average hourly pay of all industries and there are significant challenges for rising pay and safe work. (c) About the Professional development, there is a wide range of roles in the hospitality industry, resulting in a demand for a wide range of skills. However, career advancement in the hospitality industry is often not simple. (d) In terms of Health & Safety, according to data from the labor force survey, self-reported workplace injury in the food and housing sector is significantly higher than the average rate across all sectors and (e) in terms of opportunities, inequalities are faced by women and migrant workers. In particular, it was found that women are concentrated in groups lower in the corporate hierarchy and face disadvantages in terms of career development.

It is worth mentioning, however, that an extensive survey by Chin and Musa (2021) on a sample of 2.023 people (employees and customers) in 50 hotels in the three- and four-star category, in five international destinations, found that, although customer satisfaction has a direct impact on the company's financial performance, employee job satisfaction does not have a significant and positive effect on financial performance. Rather, there is an indirect relationship between employee satisfaction and financial performance, which is mediated by customer satisfaction.

The human factor is the main factor in the delivery of services in the hospitality industry and employee satisfaction is related to the services provided to tourists and dedication Research on job satisfaction of employees in the tourism sector is limited in Greece (Baroutas et al., 2020).

4 The Importance of Education in Service Quality and Job Satisfaction

As already presented in the service industries, there is a direct relationship between the quality perceived by customers and the level of satisfaction and organizational commitment of the employees who provide the service. This relationship is most important in the hotel sector, where customer satisfaction is closely linked to that of employees. This sector, as the recent pandemic has shown, is more vulnerable than others to being affected by health crises, instabilities, and other issues (Jung et al., 2021). All human resources researchers have previously emphasized that in service businesses, quality improvement should focus on recruitment, training, development, and the remuneration package. It is also true that in a labor-intensive industry, good use of human resources can give a company a competitive advantage (Mohinder, 2004).

Bharwani and Butt (2012) explained that education is an important process in the hospitality industry. It plays a positive role in developing the skills and knowledge of employees that will be used in hotel operations. The training provided to hospitality staff not only has a positive impact on work efficiency, but employees feel

satisfied with their work. The staff is trained multiple times to serve guests in the hotel on issues related to financial transactions, product modernization, food safety, etc. This feeling helps them stay in emotional connection with the organization and thus the organization acquires employees willing to stay and contribute to it. Department managers design well-structured training programs to fulfill flexible needs in operations.

Effective training enhances work performance that can lead to employee job satisfaction and organizational engagement. Mapelu and Jumah (2013) hold the view that an effective training program is such an organizational practice that can lead to greater employee engagement and a more stable workforce as the majority of employees believe that after training there is a chance to receive promotion. Vui-Yee and Paggy (2018) stated that there is improved job fulfillment and self-confidence among employees. In addition, the benefits of education according to Medina (2016) are improved competence, improved understanding, advanced self-confidence, team consistency, faster invention, and more robust work unions. The relationship between Education and Job Satisfaction is confirmed by prior research. Specifically, a study by Yang (2010) found that training and development programs positively impacted the job satisfaction of hospitality workers, while research by Tsai et al. (2014) showed that training positively affects employee job satisfaction, which, in turn, affects service quality and customer satisfaction.

5 Scope and Methodology of the Research

The main scope of the survey was to investigate the Job satisfaction factors of hotel employees in Greece. Based on the relevant literature, various factors of job satisfaction were examined, such as working conditions, company policy and administrative style, salary, completion through work, relations with colleagues, and other factors. Emphasis was placed on whether the level of education and experience affects the level of satisfaction. The individual research questions are formulated as follows.

- What is the level of satisfaction of the sampled employees, on specific job satisfaction factors and based on their personal characteristics and job position?
- How do they evaluate the quality of services provided in the hotel in which they are employed and also the company's policy in general?
- How they evaluate the effectiveness of the training programs provided by the hotel.
- Is there a relationship between job satisfaction and the quality of the Services offered at the Hotel?
- Is there a relationship and impact of education and training with the quality of the services offered at the hotel?

The questionnaire was distributed through the google drive application to 180 professionals in hotels in Greece who had participated in tourism studies, postgraduate or hospitality training programs. The questionnaires were completed between

February and May 2023. Of these, 105 were returned, bringing the degree of responsiveness to 58%. However, only 100 were evaluated as completely correctly completed, which was also the aim of the sampling. The research focused mainly to investigate the job satisfaction factors, the training provided and its impact on employee satisfaction and also the quality of the hotel services provided in relation to the characteristics of the employees, but also the level of education and training.

6 Results of the Survey

Participants in the survey were 100 professionals in the Hotel industry, from different hotels, with high specialization, which is also reflected in the background of their studies. In particular, 46% of the participants had a higher education degree and 28% even a postgraduate degree, while 19% were graduates of Post-Secondary Schools and Colleges and only 6% had basic education. In total, 85% of respondents had studies related to tourism and their specific work subject. In total, 41% were men and 59% were women, reflecting the increased participation of women in the hotel staff. Most participants belonged to the middle age group from 30 to 49 years old at 74%, while 17% were under 29 years old and 9% over 50 years old. In total, 55% had more than 10 years of experience in the industry, while 19% had between 4 and 9 years of experience and 26% had up to 3 years of experience. Finally, it should be noted that 44% of the survey participants worked in seasonal operating hotels and 56% in hotels that operate all year round. Regarding their job position, 7% stated director, 27% stated Chief / Head of Department, 36% stated experienced employee and the remaining 30% stated assistant employee, which mainly concerned younger employees.

6.1 Results About the Level of Overall Job Satisfaction

The results should be observed on a comparative basis and based on their ranking, which is why the results have been ranked in descending order, where the maximum score was 5 and the lowest was 1. Overall, job satisfaction is quite high with a score of 3.53 out 5. The highest job satisfaction score was recorded by the statements “At work, I have the opportunity to do things for other people” with 3.94, “At work, I have the opportunity to use my qualifications” with 3.92 and relations with the supervisor and colleagues with 3.68 and 3.54, respectively. On the contrary, the lowest degree of satisfaction concerned the salary they receive, in relation to the job they offer (with 3.05) but also for the opportunities for promotion or advancement offered by the company with only 3.22. Also, the way the company conducts its policy gathers the third lowest degree of satisfaction with a score of 3.22 out 5.0 (see Table 1).

Throughout the survey, assistant employees expressed the lowest job satisfaction score in terms of salary satisfaction in relation to the work they offer with 2.77,

Table 1 Overall job satisfaction factors (max = 5)

Factor	Score	STDEV
I can do things for other people	3.94	0.776
I can use my qualifications	3.92	0.872
I can guide other people	3.85	1.009
I am satisfied with the way my boss treats me	3.68	0.931
I am satisfied with the relations of colleagues with each other	3.54	0.926
I feel overall very satisfied in my work	3.53	0.881
I am satisfied with the recognition they give me	3.48	1.03
I am satisfied with the working conditions	3.37	0.939
I am satisfied with the freedom to use my own judgment and apply my own ideas/methods	3.36	0.948
I am satisfied with the feeling of accomplishment I receive	3.26	0.949
I agree with the way in which the company conducts its policy	3.22	0.927
I am satisfied with opportunities for promotion or advancement	3.15	1.077
I am satisfied with my salary in relation to the work that I provide	3.05	1.038

while the highest degree of job satisfaction with a score of 4.7 was expressed by the Managers in the factor that “In my work, I have the opportunity to guide other people”.

Based on demographic characteristics, men employees have a higher job satisfaction score than female hotel employees. In terms of age, older employees (over 50 years old) are more satisfied, in contrast, the least satisfied are employees aged 30 to 49. A significant correlation was observed between educational level and job satisfaction, while the level of education increases, the degree of job satisfaction decreases (see Table 2). This may assume that higher-educated employees have higher expectations of their jobs and these are not met.

Based on the characteristics of the job, the main findings were that the degree of job satisfaction gradually increases as the level of the position in the hierarchy increases and that employees in the administration are the most satisfied employees in a hotel, while employees in the housekeeping department are the least satisfied. The degree of job satisfaction does not vary significantly in terms of years of service, nor whether they work on a permanent or seasonal basis (see Table 3).

Human relationships, i.e., “Relationships with colleagues” but also “Relationship with the supervisor”, the “Recognition at work”, and the “Feeling of accomplishment” were directly correlated with the overall job satisfaction. As overall job satisfaction decreases, so does satisfaction in these factors. For example, those employees who declared overall job satisfied with the highest grade (5) on average declared the factor “Recognition at work” with a score of 4.62, while employees who declared overall satisfied with a score of 2, the recognition at work factor was rated with only 2.45 (Table 4).

Table 2 Degree of overall job satisfaction based on the characteristics of the employees

	Satisfaction score	STDEV
Sex	(1–5)	
Female	3.42	0.88
Male	3.68	0.88
<i>Age</i>		
Up to 29 years old	3.65	1.06
30–49 years old	3.47	0.85
50 years and over	3.78	0.83
<i>Education</i>		
Secondary schools graduates	4.17	0.98
Post-secondary schools and colleges	3.60	0.82
University degree	3.52	0.94
Post-graduates	3.36	0.78

Table 3 Degree of job satisfaction based on the characteristics of the job

	I feel overall very satisfied with my work	
Position in the hierarchy	Score	STDEV
Assistant employee	3.39	0.95
Experienced employee	3.49	0.82
Chief/head of department	3.63	0.88
Director	4.00	0.82
<i>Duration of employment</i>		
Seasonal employees	3.55	0.98
All year's employees	3.52	0.81
<i>Experience in years</i>		
0–3 years	3.50	1.03
3–9 years	3.74	0.81
9–15 years	3.44	0.65
Over 15 years	3.48	0.99
<i>Hotel department</i>		
Administration	3.60	0.84
F&B department	3.59	0.79
Sales—reservation	3.58	0.81
Reception	3.44	1.00
Housekeeping	3.29	1.25

Table 4 Overall job satisfaction in relation to human relationships, recognition, and fulfillment

Overall job satisfaction	Relations with the supervisor	Relationships with colleagues	Recognition at work	Feeling accomplished
5	4.54	3.85	4.62	4.31
4	3.92	3.77	3.82	3.59
3	3.32	3.41	3.03	2.86
2	3.00	2.82	2.45	2.18
Total	3.68	3.54	3.48	3.26

6.2 Results About the Level of Employee’s Job Satisfaction in Correlation to Quality

As part of the research, it was investigated the correlation of the hotel quality level with employee satisfaction indicators. The results on this question are presented in the following Tables 5 and 6.

Based on the data in Table 5, it is observed that the level of hotel quality is directly correlated with many employee job satisfaction factors. In particular, as the quality of the hotel increases, the “Overall satisfaction”, the “Satisfaction of the relationship with the supervisor”, the “Recognition at work”, and the “Feeling of

Table 5 Level of hotel quality in relation to human relations, recognition, and fulfillment

Level of hotel quality (mean = 3.85)	Overall job satisfaction	Relations with the supervisor	Relationships with colleagues	Recognition at work	Feeling accomplished
5	4.37	4.11	3.58	4.21	3.84
4	3.60	3.77	3.70	3.51	3.21
2–3	2.82	3.21	3.21	2.93	2.96
Mean	3.53	3.68	3.54	3.48	3.26
Correlation	1.00	0.99	0.75	1.00	0.96

Table 6 Employee’s job satisfaction factors in relation to the quality level of the hotel

Level of hotel quality (mean = 3.85)	Salary in relation to the job offered	Working conditions	Opportunities for promotion or advancement	Independency to apply own ideas/methods	Agree with the company’s policy
5	3.42	3.84	3.5	3.63	3.79
4	3.21	3.51	3.1	3.51	3.40
2–3	2.56	2.85	3.0	2.96	2.56
Mean	3.05	3.37	3.15	3.36	3.22
Correlation	0.97	0.99	0.93	0.95	0.99

accomplishment” increase proportionally. Conversely, satisfaction with relationships with colleagues does not seem to correlate with the quality of the hotel.

Also, the Job satisfaction factors given in Table 6 seem to have a direct correlation with the quality of the hotel. Especially, the factors “Salary in relation to the job offered”, “Working conditions”, “Opportunities for promotion or advancement”, “Independency to apply own ideas/methods” and “Agree with the company’s policy”, are directly related to the level of hotel quality.

6.3 *Employee’s Satisfaction in Relation to the Training and Support Provided by the Hotel.*

The implementation of internal training is an important parameter, not only for the quality delivery of services, but also for the satisfaction of employees, increasing their skills, the level of self-confidence, but also reducing work stress. In total, 13% of respondents stated that the hotel does not provide them with a special training program, while hotels that provide internal training apply “Training on the job” as a training method at a rate of 83.9%. In total, 34.5% stated the “Mentoring/Coaching” method as the training method, while 21.8% stated the “e-Learning/Video-Based training” method. In a much smaller percentage, “Case Studies” are applied by 6.9%.

Overall, satisfaction in relation to the training provided was assessed moderately with an average of 2.96. Specific questions about the training provided were evaluated at approximately the same levels, for example, the “Effectiveness” by 3.03, the “Methods” by 3.11, and the “Post-training support” by 3.07 (Table 7).

Table 7 Employee’s job satisfaction with the internal training provided

Satisfaction with training provided	Effectiveness of training	Effectiveness of training methods	Satisfaction with the support provided after the training
2.96/5.0	3.03/5.0	3.11/5.0	3.07/5.0
STDEV: 1.1	STDEV: 1.13	STDEV: 1.03	STDEV: 1.05

Table 8 Quality of services delivery in relation to staff

Quality of service delivery (mean = 4.0)	Staff education background	Staff adequacy	Satisfactory training	Support provided after training
5	3.72	3.62	3.16	3.19
4	3.32	3	3.06	3.22
3–2	2.22	2.26	2.33	2.47
<i>Mean</i>	<i>3.18</i>	<i>3.01</i>	<i>2.93</i>	<i>3.06</i>
Correlation	0.98	0.99	0.94	0.88

Finally, the quality of the services provided was correlated with various employment factors, such as education, staff adequacy, satisfactory training, and post-training support. The quality of the services provided was evaluated by the employees themselves to a very high degree and even with 4.0/5 and the above correlation showed high correlation markers. In particular, the quality of the services provided is directly related to the adequacy of staff, but also to the educational level of the staff, to the satisfactory training provided by the company, but also to the support after the provision of training (Table 8).

7 Conclusions and Suggestions

In this paper, the results of a survey of hotel employee professionals in Greece were presented, regarding job satisfaction factors in relation to various parameters. Summarizing the results of the survey, job satisfaction assessed at satisfactory levels, with an average score of 3.53 out of 5, highlighting a positive work environment and a good sense of professional pleasure.

The highest satisfaction rates were recorded by the statements “At work, I have the opportunity to do things for other people” with 3.94, “At work, I have the opportunity to use my qualifications” with 3.92. The relationships with the supervisor and the colleagues were evaluated also with high satisfaction rates. The lowest satisfaction scores were obtained by job satisfaction factors regarding the salary they receive in relation to the job they offer (with a score of 3.05) but also the opportunities for promotion or advancement offered by the company with a score of just 3.22.

Based on demographic characteristics, it is observed that men employees have a higher satisfaction score than female hotel employees, while based on age, older employees (over 50 years old) are more job satisfied.

The above findings of the survey are in line with the conclusions of the Fair Work Convention (2022) and especially regarding the low wages, the unsatisfactory opportunities for advancement in the sector, and the inequalities between male and female employees.

The effect of demographic characteristics is highlighted in other studies, for example that of Radic et al. (2019), who found that age can be a factor of job satisfaction among hotel employees, with older employees having a higher level of satisfaction compared to younger ones. In addition, research by Ghiselli et al. (2001) found that gender may play a role in hotel employees' job satisfaction, as women were found to have higher overall job satisfaction than men. Gender differences in this survey also appeared to influence prospects for training and quality of services.

The present research also showed that as the level of education of the employee increases, the degree of satisfaction at work decreases. On the contrary, the degree of satisfaction increases gradually as the position at the level of the hierarchy increases. The most satisfied employees in a hotel are those who work in the administration, while the employees in the housekeeping department are the least satisfied.

The quality of hotel services was evaluated by employees at very high levels with an average price of 4.0 out of 5, while the overall quality of hotels was evaluated by employees high with an average of 3.85/5. Subsequently, a significant correlation was found between hotel quality and employee job satisfaction. The quality of a hotel is also reflected in employee satisfaction. Hotels with higher quality have more satisfied employees, especially in terms of overall satisfaction, satisfaction with the relationship with the supervisor, recognition of work, but also a sense of accomplishment.

The correlation of service quality delivery, with factors such as staff education background, staff adequacy, satisfactory training on behalf of the hotel, but also support provided after training, showed extremely high correlations, concluding that staff adequacy and Staff education background are almost completely correlated.

Besides, these findings are also found in the relevant literature. Examples include the work of Huang and Wang (2011), who found that employee job satisfaction has a significant impact on service quality in the hotel industry, and the work of Nikolova and Ivanova (2017), who examined the relationship between education and development and quality of hotel services in Bulgarian hotels. Their findings suggest that employees who received appropriate training and development opportunities were more likely to provide better quality of service, leading to higher customer satisfaction.

The specific research question on the satisfactory training provided and its link with the quality of the services provided, showed that 13% of the participants do not receive any special training program at the hotel where they work. Overall satisfaction in relation to the training provided is not particularly high and was rated with 2.96/5 and slightly higher the support provided after the training with 3.06. The effectiveness of the training programs is also moderate, with an average value of 2.98 out of 5, (2.63/5) making it necessary to review and improve the offered training programs to better meet the needs of employees and contribute to the improvement of hotel services.

Based on the above results, it is concluded that job satisfaction and quality of services are closely related. Hotel management needs to focus on better understanding the needs and expectations of their employees in order to achieve a balanced approach improving services, job satisfaction, and quality. Possible initiatives that can be taken include improving salaries, based on the work provided by the employees, promoting the professional development of employees through the provision of training opportunities, creating attractive working conditions and improving communication between management and employees regarding hotel policy. In addition, the implementation of reward programs for employees offering high quality services and the acknowledgment of employee's contribution can increase job satisfaction and encourage continuous improvement of service quality.

Overall, improving job satisfaction, training and service quality is a strategic goal for hotels, as these factors are closely linked and can have a positive impact on the competitiveness and sustainability of hotels in the competitive hospitality industry. Investing in staff development and improving working conditions, as well as tailoring

training programs to the needs and expectations of employees and customers, can be key initiatives contributing to hotel success and guest satisfaction.

This paper can be the basis and framework for conducting wider research with the participation of a larger number of employees with different characteristics, but also for a wider statistical analysis. At the same time, based on the results obtained from this research, there are several proposals for future research in this area:

- Investigation of the factors that affect job satisfaction in more categories of hotels (e.g., boutique hotels, family hotels, luxury hotels, etc.) and hotels in different geographical areas in Greece.
- Understand employees' needs and preferences regarding education and training programs, as well as develop tailored programs to meet their requirements.
- Identify best practices for human resource management in the hospitality sector and explore strategies to improve job satisfaction, the provision of high-quality services, and the effectiveness of training programs.

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Crisis Leadership, Group Dynamics, and Change Management: A Literature Review and Future Perspectives



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Abstract Over the past 10 years, humanity has been witnessing a plethora of serious crises, such as financial, the COVID-19 pandemic, and climate crisis. As a result, these crises have caused several problems in the global market, especially in the tourism and hospitality industry. Hence, crisis leadership, group dynamics, and change management are becoming more well-known in the academic community. However, research in this field remains fragmented, as there are very few empirical reviews on this topic. In addition, existing reviews seem to approach this subject from a subjective approach without the proposal of a theoretical and practical model that can measure the connection between the variables of crisis leadership, group dynamics and change management. The aim of the current study is to investigate the influence of crisis leadership on group dynamics/change management and the proposal of several tools so as to measure the above relationships. The methodology that is used in this paper is a literature review that synthesizes theoretical insights and empirical findings.

Keywords Crisis leadership · Group dynamics · Change management · Literature review · Hospitality industry

JEL Classifications M10 · M12

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225

1 Introduction

In today's rapidly changing and unpredictable business environment, effective leadership is critical for organizations to navigate through crises and manage change successfully (Belias et al., 2023a, 2023b, 2023c). The roles and responsibilities of leaders have evolved significantly over the years, with increasing emphasis on crisis management, team dynamics and change management. To understand and address the challenges and complexities associated with these areas, extensive research is required (Van Wart & Kapucu, 2011). It is important to mention that in recent years there have been many crises that have appeared and affected not only the way organizations behave in such situations, but overall they have affected the way people behave and adopt in such difficult situations (Hayes, 2023). To name just a few of these crises, they are the financial crisis that shook the markets in the last decade, the COVID-19 crisis, the climate crisis, and the most recent Russian invasion of Ukraine and its consequences (Rossidis et al., 2021a, 2021b).

The above crises have also increased research and interests in issues related to dealing with such crises (Belias & Trihas, 2022a, 2023b). Therefore, the relationship between change and crisis management has been examined from various perspectives, such as measuring the level of success of a change management process during a crisis (Belias & Trihas, 2022b) and the integration of change in an organization during of a crisis. (Belias & Trihas, 2023a, 2023b). However, there is a need to generate further knowledge on various issues of change management, crisis leadership and how they can be managed within of organizations, including group dynamics (Bagga et al., 2022).

There are several reasons why research on crisis leadership, team dynamics, and change management is essential in the current business landscape. First, organizations operate in an increasingly volatile, uncertain, complex, and ambiguous (VUCA) environment. Consequently, leaders face unprecedented challenges in managing crises, leading diverse teams, and implementing change. Research can help identify best practices, provide evidence-based recommendations, and develop theoretical frameworks that can guide leaders in effectively addressing these challenges (Fleming & Millar, 2019). Second, the COVID -19 pandemic has highlighted the criticality of crisis leadership, team dynamics, and change management. The pandemic has forced organizations to quickly adapt to new ways of working, overcome logistical and operational barriers and manage the mental well-being of employees. Studying leadership approaches used during the pandemic can provide valuable insights into crisis management, virtual teamwork, and implementing change in times of extreme uncertainty (Junnaid et al., 2020). In addition, organizations increasingly recognize the importance of employee well-being, collaboration, and innovation. Effective crisis leadership, team dynamics, and change management help create a positive work culture, enhance employee engagement, and drive business success. Research in these areas can shed light on strategies leaders can adopt to promote employee well-being, collaboration, and innovation during crises and

change initiatives (Lewa et al., 2022). Finally, the field of leadership and management is dynamic and evolving. New theories, models, and approaches are constantly emerging. Conducting research on crisis leadership, team dynamics, and change management will help leverage existing knowledge, challenge hypotheses, and generate new knowledge that can further enrich the field. By staying current with the latest research, leaders can improve their understanding of effective leadership practices and stay ahead in a competitive business environment (Stern, 2013).

This research will focus on the hospitality sector. According to Belias and Trihas (2022a, 2022b, 2022c, 2022d, 2023a, 2023b), the hospitality industry in Greece but also on a global scale has experienced dramatic changes not only due to the COVID-19 crisis but overall due to the changing trends in tourism. This has created the need for further research into issues related to change management in the hospitality sector. For this reason, the focus of this chapter is on the hospitality sector. Overall, the need for research on crisis leadership, team dynamics and change management is evident in today's complex and ever-changing business landscape. By studying these areas, researchers can provide valuable insights and evidence-based recommendations to leaders, enabling them to navigate crises, foster positive team dynamics, and effectively manage organizational change.

For this reason, the authors of this paper investigate the relationships between the above variables and aim to answer to the following objectives/questions:

Q1: Is Crisis Leadership fully or partially related to Group Dynamics?

Q2: Is Crisis Leadership fully or partially related to Change Management?

Q3: Is the variable Group Dynamics fully or partially related to Change Management?

Eventually, this literature review aims to contribute to the existing body of knowledge by exploring the current state of research, identifying research gaps, and highlighting future perspectives in these critical areas of leadership and management, while exploring potential research tools that can be used in such future research. Regarding the structure and overall approach of this chapter, since the aim is to provide preliminary information on a new concept, the first stage will be to define the variables under consideration but also to provide an overview of how they can be measured. The second part will be a literature review to examine existing research and what their findings are.

2 Theoretical Background

2.1 Crisis Leadership

2.1.1 Definition of Crisis Leadership

Crisis leadership refers to the ability of leaders to effectively manage and guide their organizations through times of significant disruption, uncertainty, and adversity. A crisis can arise from a variety of sources, such as natural disasters, economic downturns, public health emergencies, or organizational scandals. In such challenging circumstances, leaders play a critical role in making critical decisions, mobilizing resources, inspiring confidence, and maintaining organizational stability. Crisis leadership requires a unique set of skills and strategies to navigate the complexities and mitigate the impact of crisis on the organization and stakeholders of (Mitroff, 2001).

Crisis leadership involves leadership in situations characterized by high levels of risk, ambiguity and urgency. It requires leaders to be proactive, decisive, and adaptive in their approach. Crisis leaders must demonstrate strong communication skills, strategic thinking, emotional intelligence, and the ability to inspire and motivate others in times of uncertainty and stress (Stern, 2013).

2.1.2 Types of Crisis Leadership

In addition, to defining what constitutes crisis leadership, it is important to study leadership styles and how they can be applied during a crisis. Indeed, different leadership styles can be observed during a crisis, each with its own strengths and limitations. The choice of leadership style depends on the specific context, the nature of the crisis and the characteristics of the leader. Here are some commonly observed leadership styles during a crisis (DuBrin, 2013):

1. **Directive Leadership:** Directive leadership involves providing clear instructions, guidance, and specific instructions to followers. This style is often used in situations where immediate action is required to ensure the safety and survival of the organization. Leaders who use this style take charge, make decisions quickly, and direct others on what needs to be done. While directive leadership can provide clarity and a sense of direction during crises, it can also limit the autonomy and creativity of workers (DuBrin, 2013).
2. **Transformational Leadership:** Transformational leaders inspire and motivate others through a compelling vision, charisma, and the ability to cultivate trust and confidence. They focus on empowering and developing their followers, promoting collaboration, and encouraging innovative thinking. Transformational leaders during a crisis are able to create a sense of purpose, rally people around a common mission, and adapt their leadership approach to meet emerging

- challenges. This style can be extremely effective in building commitment and resilience within organization (DuBrin, 2013).
3. **Servant Leadership:** Servant leaders prioritize the needs of their followers and focus on serving their interests, growth, and well-being. They show empathy, actively listen to others and provide support in difficult times. Servant leaders aim to create a nurturing and inclusive environment where individuals can thrive and contribute their best. During a crisis, servant leaders prioritize the well-being of their employees by offering support, resources, and guidance. This style promotes a caring culture and fosters trust and loyalty among followers (DuBrin, 2013).
 4. **Adaptive Leadership:** Adaptive leadership emphasizes the ability to adapt to rapidly changing circumstances, think creatively, and find innovative solutions. Adaptive leaders embrace uncertainty, challenge the status quo, and encourage experimentation. They promote a learning mindset and encourage their teams to think outside the box and adapt quickly to new realities. During a crisis, adaptive leaders are flexible, open to new ideas, and willing to take calculated risks. They cultivate a culture of agility and resilience within it organization (DuBrin, 2013).
 5. **Authentic Leadership:** Authentic leaders are genuine, self-aware, and transparent in their actions and communications. They build trust through their integrity, consistency and ethical behavior. Authentic leaders during a crisis stay true to their values, provide honest and open communication, and show empathy. They create authentic connections with their followers, fostering a sense of trust and unity in difficult moments (DuBrin, 2013).

It is important to note that effective crisis leadership often involves a combination of leadership styles, as leaders must adapt their approaches based on the evolving nature of the crisis and the needs of their organization and stakeholders. Flexibility and situational awareness are key characteristics of successful crisis leaders (Wu et al., 2021).

Overall, crisis leadership is a complex and demanding role that requires leaders to navigate uncertainty, make difficult decisions and inspire confidence in times of crisis. Different leadership styles can be observed during a crisis, each with their own strengths and limitations. Directive leadership provides clarity and immediate action, while transformational leadership inspires and motivates others. Servant leadership focuses on the well-being of followers, adaptive leadership emphasizes agility and innovation, and authentic leadership builds trust and unity. Effective crisis leadership often involves a combination of these styles, as leaders adjust their approaches based on evolving circumstances (Muffet-Willet & Kruse, 2009).

To excel in crisis leadership, leaders must possess a variety of skills, including effective communication, strategic thinking, emotional intelligence, and the ability to inspire and motivate others. They must also be flexible, adaptable and able to make decisions under pressure. By understanding different leadership styles and their applications, leaders can better navigate crises, inspire their teams, and mitigate the impact of crisis on their organizations and stakeholders (Stern, 2013).

As the business landscape continues to evolve, the need for effective crisis leadership remains paramount. Through continued research and analysis of successful crisis leadership practices, scholars and practitioners can further enhance our understanding of this critical leadership role. By developing and refining crisis leadership strategies, organizations can better prepare for and respond to future crises, ensuring their resilience and long-term success (Forster et al., 2020).

2.1.3 The Crisis Leadership Self-assessment Questionnaire

The Crisis Leadership Self-Assessment Questionnaire is a tool designed to assess an individual's abilities and skills in crisis management and leadership. Its purpose is to help individuals reflect on their strengths and weaknesses in crisis situations, identify areas for improvement, and develop strategies to enhance their crisis leadership skills. It is important to mention that there is no consensus on the development of a well-accepted instrument for crisis leadership. There are some attempts to develop such a tool, such as by Mitut (2011). For the purposes of this chapter, the authors developed a combination of variables that can be used to assess the quality and effectiveness of crisis leadership.

The specific questions and format of the questionnaire may vary, but generally it covers various aspects of crisis leadership. Here are some common areas that can be assessed on a basic basis their Mitut (2011), Van Wart and Kapucu (2011) and McNulty et al. (2021):

1. **Decision-Making:** Assessing the ability to make quick and effective decisions under pressure, taking into account the impact on stakeholders and assessing the risks and benefits of different courses of action.
2. **Communication:** Assessment of communication skills to deliver clear, timely and empathetic messages to different audiences during a crisis, including employees, customers, the media and the public.
3. **Adaptability:** Assessing the ability to adjust and adapt strategies and plans in response to evolving crisis situations, taking into account new information and changing circumstances.
4. **Resilience:** Assessment of personal resilience and ability to cope with stress, uncertainty and setbacks during a crisis while maintaining focus and a positive mindset.
5. **Team Leadership:** Assessing the ability to lead and motivate teams, encourage cooperation, delegate tasks effectively, and create a sense of unity and purpose among team members.
6. **Problem Solving:** Assessing the ability to analyze complex problems, identify root causes, and develop innovative solutions in high-pressure situations.
7. **Stakeholder Management:** Assessment of the ability to identify and prioritize stakeholders, understand their concerns and effectively manage relationships, including addressing their needs and expectations.

8. Learning and improvement: Assessing willingness to reflect on past crisis experiences, learn from mistakes, and continuously improve crisis management skills and strategies.

It is important to mention that the specific questions and scoring system may vary depending on the purpose and design of the questionnaire. It is also worth noting that these assessments are often used as a tool for self-reflection rather than a definitive measure of crisis leadership ability.

2.2 Team Dynamics

2.2.1 Definition of Group Dynamics

Group dynamics refers to the patterns of interaction and relationships between individuals within a group setting. It involves the study of how individuals within a group influence and are influenced by one another and how these interactions shape the overall functioning and behavior of the group. Understanding group dynamics is essential to various fields such as psychology, sociology, organizational behavior, and group therapy. In this essay, we will explore the concept of team dynamics, its components, theories and factors that influence it.

One of the key elements of team dynamics is team structure. Group structure refers to the formal and informal roles, rules, and patterns of communication within the group. Formal roles are defined positions, such as leader or facilitator that have specific responsibilities and authority. Informal roles emerge spontaneously within the group, such as the role of mediator or joker. Norms, on the other hand, are the shared expectations and rules that guide behavior within the group. These rules can be explicit or implicit and shape how members interact and behave. Communication patterns within the group determine how information is shared, decisions are made, and conflicts are resolved. Another important aspect of team dynamics is team cohesion. Group cohesion refers to the degree of unity, mutual liking and bonding among group members. Cohesive groups tend to have higher levels of trust, cooperation, and commitment among their members. Cohesion can be affected by a number of factors, including shared group goals, interpersonal attraction between members, the degree of similarity or dissimilarity within the group, and the level of external threat or competition the group faces (Forsyth, 2018).

Power dynamics also play an important role in group interactions. Power refers to the ability to influence or control the behavior and decisions of others. Within a group, power can come from various sources, such as expertise, position, formal authority, or social influence. Power dynamics can shape the distribution of influence, decision-making processes, and overall group functioning (Farnsworth & Boon, 2010). It is important to note that power within a group can be either centralized, with a few members having significant influence, or decentralized, with power distributed more evenly among members. Conflict is another important element of

team dynamics. Conflict occurs when there are differences in interests, perspectives, or goals among group members. It can be positive and negative, depending on how it is managed. Healthy conflict can lead to innovation, better decision-making, and increased cohesion if resolved effectively. However, unresolved or poorly managed conflict can lead to tension, division and reduced team performance. Effective conflict resolution strategies include open communication, active listening, negotiation, and compromise (Forsyth, 2018).

Several theories explain and provide insights into group dynamics. One such theory is Bruce Tuckman's team development model, which suggests that team's progress through stages: forming, storming, setting, executing, and adjourning. During the formation stage, members get to know each other and create initial impressions. In the storm stage, conflicts and power struggles emerge. In the normalization stage, group norms and cohesion are developed. The execution stage represents the mature functioning of the team, where tasks are effectively accomplished (Forsyth, 2018). Finally, in the adjournment stage, the group disbands or moves into a new phase. Social identity theory, proposed by Henri Tajfel and John Turner, emphasizes the role of social identity and intergroup dynamics in group behavior. The theory suggests that individuals derive their sense of self and self-worth from group membership. They seek positive social identity and tend to favor in groups over outgroups. This can lead to intergroup bias, stereotyping, and in-group favoritism. Understanding social identity processes is crucial to managing diversity, promoting inclusion, and minimizing intergroup conflict within groups (Hogg, 2016).

Various factors affect team dynamics. Group size, for example, affects communication patterns, decision-making processes, and the level of member participation. Larger groups may face challenges in coordinating and reaching consensus, while smaller groups may have more cohesive and intimate interaction. Another influencing factor is the level of diversity within the team. Diversity in terms of age, gender, ethnicity, and expertise can bring diverse perspectives and enhance creativity, but it can also lead to conflicts and challenges in communication and decision-making. Leadership styles and behaviors significantly influence team dynamics (Peterson et al., 2003). Different leadership approaches, such as authoritarian, democratic or laissez-faire, can shape the functioning, cohesion, and satisfaction of its group members (Zaccaro et al., 2001). Effective leaders understand the needs of their team members, provide direction, encourage open communication, and facilitate collaboration (Hoyt et al., 2003).

In conclusion, group dynamics includes the patterns of interaction, relationships, and behaviors within a group. It includes the study of group structure, cohesion, power dynamics, conflict, and various influencing factors. Understanding team dynamics is critical to promoting effective teamwork, managing conflict, and optimizing team performance. By understanding the complexity of team dynamics, individuals and organizations can create environments that facilitate collaboration, innovation, and growth.

2.2.2 The Group Development Questionnaire (GDQ)

The Group Development Questionnaire (GDQ) is a widely used assessment tool developed by Susan Wheelan to measure the stages of team development within organizational teams. The GDQ provides valuable insight into a team's dynamics and functioning, helping organizations understand the team's current stage of development and identify areas for improvement. In this analysis, we will explore the key features of the GDQ, its benefits and limitations. The GDQ is designed to align with the four stages of team development proposed by Bruce Tuckman: form, storm, set, and execute. It consists of a set of statements that reflect various aspects of group functioning, including communication, decision-making, cohesion, and conflict resolution. Respondents rate their agreement or disagreement with each statement on a Likert scale, which allows quantitative analysis of the results (Jacobsson & Wilmar, 2019).

One of the key strengths of GDQ is its ability to provide a snapshot of a group's stage of development. By evaluating the responses, organizations can determine whether the team is in the initial forming stage, experiencing conflict and power struggles during the storming stage, establishing rules and cohesion in the normalizing stage, or achieving high performance in the executing stage. This information allows leaders and team members to better understand team dynamics and tailor interventions accordingly. The GDQ also helps identify specific areas for improvement within the team. By examining responses to individual statements, organizations can identify strengths and weaknesses in communication patterns, decision-making processes, and conflict resolution strategies. This knowledge enables targeted interventions and the development of action plans to improve team dynamics and overall performance. Another strength of the GDQ is its ability to promote self-awareness and reflection among team members. By participating in the questionnaire, team members are encouraged to think critically about their own behaviors, attitudes, and contributions to the team. This self-reflection encourages a deeper understanding of group dynamics and fosters personal growth and responsibility (Gren et al., 2020).

However, GDQ has some limitations that should be considered. First, it is a self-report questionnaire, based on individuals' perceptions of group dynamics. This subjective nature can introduce bias, as individuals may have different interpretations or experiences within the group. Therefore, it is important to combine questionnaire results with other forms of data, such as observation or feedback from multiple sources, to gain a more comprehensive understanding of group dynamics. Second, the GDQ focuses primarily on the stages of team development and may not capture all aspects of team dynamics. Although it provides information about the group's progress through the stages, it may not delve into other factors that affect group functioning, such as power dynamics, cultural influences, or external factors. Organizations should consider supplementing the GDQ with additional assessments or qualitative methods to gain a more holistic view of team dynamics (Rubin et al., 2010).

In conclusion, the Group Development Questionnaire (GDQ) is a valuable tool for assessing and analyzing team dynamics within organizational teams. It helps organizations understand the stage of team development, identify areas for improvement, and promote self-awareness among team members. While the GDQ offers many advantages, it is important to recognize its limitations and supplement the assessment with other forms of data to gain a more complete understanding of group dynamics. By using the GDQ effectively, organizations can improve teamwork, communication, and performance within their teams.

2.3 Change Management

2.3.1 Definition and Analysis of Change Management

Change management refers to the structured approach of moving individuals, groups and organizations from their current state to a desired future state. It involves planning, implementing and monitoring change to effectively manage the impact on people, processes and systems. Change is inevitable in today's dynamic business environment, and organizations that can navigate and adapt to change successfully are more likely to thrive. In this essay, we will delve into the concept of change management, its importance, key principles and strategies for successful implementation. This concept is crucial because it helps organizations respond effectively to external pressures such as market changes, technological developments, or regulatory changes. It also enables internal improvements such as process optimization, cultural transformations or mergers and acquisitions. By managing change effectively, organizations can minimize resistance, enhance employee engagement, and increase the likelihood of achieving desired outcomes (Lauer, 2010).

A key principle of change management is understanding the need for change. This includes identifying the drivers and reasons behind change, such as competitive threats, customer demands or internal inefficiencies. Clear and compelling reasons for change help create a sense of urgency and provide the basis for communication and stakeholder engagement. Another important principle is effective communication. Transparent and consistent communication is vital in times of change. It helps employees understand the reasons for the change, the desired future state, and their role in the process. Communication should be ongoing, addressing concerns, providing updates and reinforcing the vision for change. Different channels and forms of communication should be used to effectively reach all stakeholders (Lauer, 2010). Stakeholder engagement and participation is also a critical aspect of change management. Stakeholders include employees, managers, customers, suppliers, and other individuals or groups affected by the change. Involving stakeholders from the start encourages a sense of ownership, increases buy-in and ensures that their perspectives and concerns are taken into account. Stakeholder engagement through feedback mechanisms, participation in decision-making and clear expectations help create a collaborative and supportive environment. Therefore, a comprehensive change

management plan is essential for successful implementation. This plan describes the goals, scope, timeline, resource requirements, and key activities for the change initiative. Identifies potential risks and mitigation strategies, as well as the roles and responsibilities of the individuals involved. A well-defined plan provides a road map for executing and monitoring the change, ensuring that the necessary resources and support are in place (Daft, 2021).

Dealing with resistance to change is a major challenge in change management. Resistance can arise from fear of the unknown, loss of control, or concerns about personal repercussions. It is important to recognize and address resistance proactively. This can be done through open dialogue, involving employees in the change process, addressing concerns and providing support and training. Leaders should foster a supportive culture that values employee feedback and encourages experimentation and learning. Change management also requires building change capabilities within the organization. This includes developing a culture that embraces change, encouraging continuous learning and building resilience. Adaptability includes skills such as adaptability, problem solving, and agility. Organizations that cultivate a learning mindset and provide opportunities for growth and development are better equipped to effectively navigate future change (Daft, 2021). Measuring and evaluating the impact of change is crucial to assessing its success and making necessary adjustments. Key performance indicators (KPIs) should be established to monitor progress and measure results. This may include metrics related to employee satisfaction, productivity, customer satisfaction, financial performance or other relevant indicators. Regular evaluation helps identify areas for improvement, ensures that change is aligned with desired outcomes, and allows for course correction if needed (Belias & Koustelios, 2014a, 2014b).

Change management strategies may vary depending on the specific context and nature of the change. Some common strategies include:

1. **Creating a Compelling Vision:** Clearly articulating the desired future state and the benefits of change to inspire and engage stakeholders.
2. **Building a Guiding Coalition:** Forming a group of influential people who can advocate for change, provide support and drive implementation.
3. **Empowering Employees:** Giving employees the autonomy and resources to contribute to the change process, fostering a sense of ownership and responsibility.
4. **Provide Training and Support:** Equip employees with the necessary skills and knowledge to adapt to change and provide ongoing support during the transition.
5. **Pilot Implementation and Learning:** Implement small-scale pilots or experiments to test the change before full-scale implementation, allowing for learning and adjustments based on feedback and insights.
6. **Celebrating Successes:** Recognizing and celebrating milestones and achievements throughout the change journey to maintain motivation and momentum (Cameron & Green, 2019).

In conclusion, change management is a critical process that enables organizations to navigate and adapt to the evolving business environment. By understanding the need for change, communicating effectively, engaging stakeholders and building capacity for change, organizations can successfully implement change initiatives. Strategies such as creating a compelling vision, empowering employees, and providing support and training are key to managing change effectively. By embracing change as an opportunity for growth and continuous improvement, organizations can enhance their agility, competitiveness, and long-term success.

2.3.2 Change Management Measurement

Regarding how to measure change management, there are many different approaches, such as how to measure resistance to change (Belias & Trihas, 2022c), the success of change (Belias & Trihas, 2022b), the resistance to change (Belias & Trihas, 2022d), and many other approaches.

An interesting approach that is widely used and accepted (Belias & Trihas, 2022b) is the questionnaire used by Zand and Sorensen (1975), who have developed a 5-point Likert scale to estimate the success of a change. The Likert scale ranges from 1: “This sentence accurately depicts what is happening” to 5: “This sentence depicts exactly the opposite of what is happening”. Based on this, the questionnaire has developed a set of nine questions that are favorable to the powers influencing the course of change and nine corresponding questions. It examined the variables involved in the success of change (favorable/adverse forces for unfreezing, favorable/unfavorable forces for movement, favorable/unfavorable forces for refreezing. In addition, Belias and Trihas (2022b), and Muneeba (2019) used the questionnaire successfully while both researches showed that it is a reliable research tool and can bring valuable conclusions to the topics examined.

3 Literary Criticism

3.1 *Crisis Leadership and Team Dynamics in the Hospitality Industry*

The hospitality industry is no stranger to crises. From natural disasters and terrorist attacks to pandemics and economic downturns, this sector faces numerous challenges that can have a significant impact on business operations and reputation. In times of crisis, effective leadership and strong team dynamics are critical to navigating through uncertainty, minimizing damage, and building resilience (Shukla et al., 2022).

Group dynamics in crisis situations can be complex. Tensions and emotions can be high and conflicts can arise due to the high stress nature of the situation. However, a skilled crisis leader can take advantage of this dynamic to create a cohesive and

resilient team. Open channels of communication, active listening, and cultivating a culture of trust and collaboration are vital. Leaders should encourage team members to voice concerns, share ideas, and engage in constructive problem solving. By appreciating different perspectives and fostering a sense of psychological safety, leaders can tap into the collective intelligence of their teams and make better informed decisions (Senbeto & Hon, 2021).

In the hospitality industry, crisis leadership and team dynamics extend beyond internal teams. Collaboration with external stakeholders such as local authorities, suppliers, and the community is vital. Effective crisis leaders proactively engage with these stakeholders, build strong relationships and ensure open lines of communication. By collaborating, sharing information, and coordinating efforts, leaders can leverage the collective resources and expertise of the larger community to mitigate the impact of the crisis (Senbeto & Hon, 2021). In this case, important evidence comes from Cronin and Parry (2014) who used a Grounded Theory approach to examine how crisis leadership and team dynamics interact during a hospitality crisis. Their research was conducted with 12 interviews among Thai hotel workers who have experienced the 2010 red shirt protest crisis in Thailand. Empirical evidence from this research showed that training and preparedness are key elements for crisis leadership and team dynamics in the hospitality sector. Organizations in the hospitality industry should invest in comprehensive crisis management plans, regular exercises, and training programs to prepare their teams for various scenarios. By simulating crisis situations and testing response protocols, leaders can identify gaps, improve coordination, and build the confidence and resilience of their teams. The same research also showed that transformational leadership can support employees and promote cohesion and team dynamics during such a difficult time. Furthermore, the same research showed that crisis leadership and team dynamics should not be limited to reactive measures. Preventive measures such as risk assessment and mitigation strategies can help minimize the impact of potential crises. Leaders should foster a culture of continuous improvement where team members are empowered to identify and address potential risks and vulnerabilities in their day-to-day operations.

Another important research was done by Alzoubi and Jaaffar (2020) who did an extensive literature review to create a conceptual framework that will enable research in this field. Based on this model, the Donbak et al. (2022) conducted an empirical investigation on a sample of hotel managers from Adiyaman, Turkey, in order to examine which leadership styles were used to deal with the COVID-19 crisis but also how it affected team dynamics within the organization. The research was based on Alzoudi and Jaaffar's model which produced a qualitative research with semi-structured interviews conducted with 4 and 5 star hotel managers from Adiyaman, accompanied by a systematic literature review. Research has shown that indeed, crisis management requires the best possible kind of leadership. The research that was made by them Donbak et al. (2022) showed that transformational leadership can promote team dynamics and capitalize on the functioning of teams within the organization to leverage its ability to cope with a crisis.

In conclusion, crisis leadership and team dynamics are critical components of effective crisis management in the hospitality industry. Competent leaders, often

adopting the transformational leadership style, who can inspire, communicate, and make sound decisions under pressure are invaluable in times of crisis. By cultivating a culture of trust, collaboration, and open communication, leaders can harness the collective intelligence and resilience of their teams. Collaboration with external stakeholders further enhances crisis management efforts. Finally, investing in training, preparedness and preventive measures can enhance the overall resilience of hospitality industry organizations in a crisis.

3.2 Crisis Leadership and Change Management in the Hospital Industry

Determining the “best” crisis leadership style for managing change in the leisure industry based on empirical evidence can be challenging (Belias et al., 2023d). Leadership effectiveness may vary depending on the specific context, the nature of the crisis or change, and the unique characteristics of the organization. Different studies may yield different results because of the complexities involved in measuring the impact of leadership in real-world scenarios.

However, empirical research has shown that certain leadership styles tend to be more effective in specific situations:

1. **Transformational Leadership:** Transformational leadership has been widely studied and is often associated with positive outcomes, such as increased employee satisfaction (Belias & Koustelios, 2014a, 2014b), higher motivation and improved performance (Belias et al., 2022). The study by Kim et al. (2021), which was conducted on a sample of 36 hotel managers in the US using a 7-item Likert scale questionnaire on transformational leadership along with many other questions about change management and quality of work, found that transformational leaders can effectively inspire and motivate their teams in times of change. Research by Kim et al. (2021) showed that transformational leadership can be particularly effective in situations where a clear and compelling vision is needed to guide the organization through a major transformation.
2. **Servant Leadership:** Servant leadership has also shown promising results in various industries, including the leisure industry. Studies such as Linuesa-Langreo et al. (2016) suggest that servant leaders can create a positive work environment that enhances employee engagement and commitment. Irfan (2021) conducted a quantitative survey among 231 employees from 4- and 5-star hotels in Erbil, Turkey. The researcher has developed his own survey instrument to measure the impact of servant leadership on change management. Research has shown that in the context of change management, servant leaders can build trust and support among employees, which can be vital to the successful implementation of new initiatives.
3. **Adaptive Leadership:** Adaptive leadership has gained attention as a valuable style in navigating complex and uncertain environments, although there is quite

limited research. One of the rare investigations is done by Glover et al. (2002) and Rescalvo-Martin et al. (2021) in their literature review state that in the leisure industry, which faces constant changes due to external factors, adaptive leaders can respond effectively to face challenges and adjust strategies as needed. Research shows that adaptive leadership can enhance an organization's ability to adapt and thrive in dynamic environments.

While these leadership styles have shown promise in different contexts, it is important to note that leadership effectiveness is not solely determined by a particular style. Rather, it is influenced by a combination of factors, including the leader's abilities, the organization's culture, the specific challenges faced, and the receptivity of team members to change (Belias et al., 2022). In addition, the success of change management initiatives also depends on other factors, such as communication, organizational support, and resource availability. Leaders who can effectively combine elements of various leadership styles and adjust their approach based on the situation are more likely to achieve positive results (Irfan, 2021).

In summary, empirical evidence suggests that transformational, servant and adaptive leadership styles can be effective in managing change in the leisure industry. However, there is no one-size-fits-all solution, and the best approach may vary depending on the specific circumstances and unique characteristics of the organization. Leaders should continually assess the needs of their teams and the challenges they face to determine the most appropriate leadership style to effectively manage change.

3.3 Group Dynamics and Change Management in the Hospitality Industry

Change management is a critical aspect of organizational development and its success is greatly influenced by the team dynamics within an organization. Group dynamics refers to the interactions, relationships, and behaviors of individuals within a team or group. Understanding how team dynamics affect change management efforts is essential for leaders and managers seeking to implement successful organizational change. Belias and Trihas (2023a, 2023b) conducted a quantitative survey on a sample of 372 hotel employees using the Zand and Sorenson (1975) questionnaire. Among the many findings of this research was that team dynamics have a significant impact on change management. This occurs through the positive impact team cohesion has on change success, while team dynamics can ensure effective communication between the various change agents and organizational structure. Additionally, based on Miranda and Bostrom (1993), research based on an extensive literature review has pointed out that team dynamics can cause both constructive and destructive conflict during change management. While constructive conflict can lead to better decision-making and innovation, destructive conflict can hinder change efforts.

Overall, the relationship between team dynamics and change management is complex and multifaceted. Empirical evidence strongly supports the idea that team cohesion, effective communication, leadership style, and conflict management are critical factors influencing the acceptance and implementation of change. Understanding and leveraging team dynamics can enhance the success of change management initiatives within organizations. Leaders and managers must proactively address team dynamics, build cohesive teams, promote open communication, demonstrate transformational leadership, and effectively manage conflict to create a supportive environment for successful change implementation. By incorporating these insights from the literature and empirical evidence, organizations can navigate change challenges more effectively and achieve desired outcomes (Table 1).

4 Conclusions

The hospitality sector is no stranger to crises and effective crisis leadership, team dynamics, and change management are essential to the industry's resilience and success (Ntalakos et al., 2023a, 2023b, 2023c; Rossidis et al., 2020). This literature review explored the interplay between crisis leadership, team dynamics and change management, shedding light on their importance and possible future perspectives for the hospitality sector. The intersection of crisis leadership, team dynamics and change management has enormous potential for the continued growth and resilience of the hospitality industry. To thrive in an increasingly volatile and competitive landscape, organizations should strive to seamlessly integrate these dimensions. Proactive crisis planning that takes into account team dynamics and change management strategies can enhance an organization's ability to successfully navigate crises. Leaders should also foster a culture of learning that values adaptability, continuous improvement and innovation, enabling the hospitality sector to stay ahead of evolving consumer demands and market disruptions.

The chapter showed that there is a lack of research in this area. The research is quite limited and therefore requires significant research in this area. In conclusion, the literature review highlights the critical importance of crisis leadership, team dynamics, and change management in the hospitality industry. Based on empirical evidence, it emphasizes the need for leaders to be adaptive, collaborative and proactive in their approach. By embracing these principles and integrating them coherently, the hospitality sector can enhance its ability to overcome challenges, seize opportunities and thrive in an ever-changing environment. As the industry continues to evolve, future prospects should prioritize cultivating resilient leaders, cohesive teams and agile strategies, fostering a culture of innovation and adaptability that ensures sustainable success in the face of crises and dynamic market conditions.

Table 1 Examination of existing literature research regarding the relationship between crisis leadership, group dynamics and change management

Authors	Methods used	Conclusions	Area of research
Belias and Trihas (2023a, 2023b)	Quantitative research on 372 hotel employees in Greece	Team dynamics have a significant impact on change management	Team dynamics and change management
Donbak et al. (2022)	Empirical research on 4 and 5 star hotel managers from Adiyaman, Turkey	Transformational leadership can promote team dynamics	Transformational leadership and team dynamics
Irfan (2021)	Quantitative Research on 231 employees from 4 and 5 star hotels in Erbil, Turkey	In the context of change management, servant leaders can build trust and support among employees, which can be vital to the successful implementation of new initiatives	Servant leadership, trust and support
Kim et al. (2021)	Quantitative research on 36 hotel managers working in the USA	Transformational leadership can be particularly effective in situations where a clear and compelling vision is needed to guide the organization through a major transformation	Transformational leadership
Senbeto and Hon (2021)	Qualitative research on 12 Thai hotel employees	Training and preparedness are key elements for crisis leadership and team dynamics in the hospitality industry	Crisis leadership and team dynamics
Rescalvo-Martin et al. (2021), Glover et al. (2002)	Literature review	Adaptive leadership can enhance an organization's ability to adapt and thrive in dynamic environments	Adaptive leadership, dynamic environment
Shukla et al. (2022)	Literature review	Effective leadership and team dynamics are critical to navigating through uncertainty, minimize damage	Leadership and group dynamics
Miranda and Bostrom (1993)	Literature review	Team dynamics can cause both constructive and destructive conflict during change management	Team dynamics and Change management

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Labour Mobility and Tourism. Challenges and Opportunities for Decent and Sustainable Work in the Tourism Sector. The Case of Greece



Ioanna C. Chatzopoulou

Abstract Travel and Tourism industry plays a key role in economic growth and job creation across the world. The travel sector offers employment opportunities particularly to women, young people and migrant workers, who represent a large share of the industry workers. Despite its important contribution to employment, local and national economic growth and prosperity, the tourist labour sector faces decent work challenges and occupational safety and health risks, largely due to the dominance of informal work in the sector. The article aims to present the positive aspects of the labour mobility in the tourism sector and its implications for the social and economic life of migrant labourers. Furthermore, it refers to the inequalities in the tourism labour market, which affect disproportionately women, young people, migrants and workers in the informal economy, to the deficits in social and health protection, that workers face and to the gender-based violence and harassment in the tourism labour sector. Particular focus will be placed on policies, strategies, good practices and on the relevant European and Greek protective legislation, towards a decent, fair and sustainable work in the tourism sector.

Keywords Migration · Tourism · Workforce mobility · Labour · Inequality · Resilience

1 Introduction

The tourism sector is an important employer and a pivotal factor for economic growth. Globalization, digitalization, demographic developments and climate change have had an impact on the tourism labour market, contributing to creation of new jobs and innovative forms of employment, to poverty reduction and economic development, but also, in some cases to a considerable uncertainty regarding applicable workers' rights and working conditions and to inequalities and deficits in social and health

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245

protection, affecting mainly migrants, youth and women workers (ILO, *The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID—19 pandemic*, n.d.).

In this evolving tourism labour market, there is an urgent need for the promotion of inclusive, fair, socially responsible and decent working conditions in the tourism sector.

2 The Economic and Employment Impact of Travel and Tourism Sector

Travel and Tourism sector is one of the largest economic sectors globally, having a significant importance for prosperity, job creation, local, national and global economic development and diversification. Travel and Tourism has also indirect benefits through supply chain linkages to other economic sectors, like food services, retail, agriculture and transport (World Travel and Tourism Council, *Travel and Tourism*, n.d.). It plays a major role in boosting prosperity in the regions of destination, including coastal, rural and remote communities, by providing opportunities for developing and fostering regional integration (ILO, *The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID—19 pandemic*, n.d.).

In particular according to the World Travel and Tourism Council's research, which has been quantifying the global economic and employment impact of the Travel and Tourism sector for nearly 30 years, in the pre COVID-19 era, 1 in 5 new jobs created across the world during 2014–2019 has been in Travel and Tourism. The fastest growing region was Asia Pacific with 5.5% growth, and the second one Middle East with a 5.3% growth.

Moreover according to the 2019 annual research, which covers 185 countries and economies, and 25 regions of the world, in 2019 Travel and Tourism represented 10.3% of global gross domestic product (GDP) (US\$ 10 trillion) and 10.4% of total employment (334 million jobs), while international visitor spending amounted to US\$ 1.9 trillion.

WTTC's latest annual research reveals that in 2022, the Travel and Tourism sector represented 7.6% of global GDP; an increase of 22% from 2021 and only 23% below 2019 levels. Moreover, in 2022, 22 million new jobs have been created, representing a 7.9% increase on 2021, and only 11.4% below 2019 (World Travel and Tourism Council, *Economic Impact Research*, n.d.).

The tourism sector is an important employer for women, who represent 54% of the total number of the workers of the sector, compared to 39% of employers in the wider economy (ILO, *ILO guidelines on decent work and socially responsible tourism*, n.d.).

The sector of tourism also occupies many young people, the majority of whom are under the age of 35, as well as migrants who contribute to the workforce to a

large extent (ILO, *ILO guidelines on decent work and socially responsible tourism*, n.d.).

3 Inequalities Affecting Tourism Workforce

Despite its high potential for job creation and economic growth, the tourism sector and its workers are exposed to decent work challenges and inequalities, like excessively long working hours, low wages, deficits in health protection, gender-based discrimination, inadequate social security coverage, income inequality and poor working conditions, inequality of opportunity and treatment, violence, exploitation, stress and sexual harassment, which affect disproportionately women, young people, migrants, low-skilled and unskilled workers and workers in the informal economy. The high incidence of informality in the sector is due in part to its seasonality, temporary employment, weak regulation, enforcement and labour organization (ILO, *The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID—19 pandemic*, n.d.).

Besides shift and night work, as well as non-standard forms of employment (NSFE), including irregular working hours, unpredictable shifts, part-time, seasonal and casual employment and an increasing rate of outsourcing and subcontracting, are common in tourism. The recent pandemic crisis led to a worsening of working conditions, affecting mainly young, own account workers, migrants and women workforce, due, as for the latter, to the sector's pre-existing gender inequalities and the fact that women predominate the sector's workforce (ILO, *The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID—19 pandemic*, n.d.).

More specifically, as far as the disparity in the tourism sector is concerned, it is worth mentioning that despite the fact that women represent the majority of tourism workforce, yet they are, by and large, occupied in lower-level positions in the sector, while their representation in senior management and their recruiting into high-level employment is low, also due to the lack of women's high-level and soft skills training needed to ensure their career progression. Moreover, women in tourism earn 14.7% less than men for equivalent work, while women in broader economy earn 16.8% less. However, the gender wage gap is narrower in tourism compared to the one in the broader economy at the global level, while wages in the tourism sector are comparatively lower for both men and women than average wages across the broader economy (UNWTO, *Global Report on Women in Tourism—Second edition*, n.d.).

4 Initiatives, Strategies, Good Practices and Legal Instruments Towards a Decent, Fair and Sustainable Work in the Tourism Sector

4.1 *International Initiatives and Policies*

4.1.1 ILO's International Labour Standards and Guidelines

International labour standards are legal instruments created by the ILO's constituents (governments, employers and workers) and establishing basic principles and rights at work. They take the form either of Conventions (or Protocols), which are legally binding international treaties, that may be ratified by member states, or of Recommendations, which contain non-binding guidelines. International Labour Standards cover a variety of issues related to, inter alia, occupational safety and health, equality of opportunity and treatment, decent earnings, ensuring safe working conditions, providing social and maternity protection and safeguarding workers' rights, including the rights of migrants, women's and youth employment related Conventions and Recommendations are among others: Discrimination (Employment and Occupation) Convention, 1958, Occupational Safety and Health Convention, 1981 (No. 155) the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up (1998), the ILO Declaration on Social Justice for a Fair Globalization (2008), the Tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy (MNE Declaration) (adopted in 1977, revised in 2000, 2006 and 2017); the Working Conditions (Hotels and Restaurants) Convention, 1991 (No. 172), and Working Conditions (Hotels and Restaurants) Recommendation, 1991 (No. 179) (ILO, *Conventions and Recommendations*, n.d.; ILO *ILO guidelines on decent work and socially responsible tourism*, n.d.).

Aside from legal binding instruments, the ILO has put forward some beneficial guidelines—"Guidelines on Decent Work and Socially Responsible Tourism"—which can be implemented by governments, as well as by employers and workers. These guidelines aim to promote the sustainability of tourism enterprises, investment in skills related to productive tourism and enhancement of workers' rights.

ILO Sectoral guidelines are based on international labour standards and other sources (e.g. Declarations, Codes of Conduct, etc.) (ILO, *ILO guidelines on decent work and socially responsible tourism*, n.d.).

Furthermore, in order to promote productive employment and decent work, the ILO has created an agenda for the community of work, namely the ILO's Decent Work Agenda, whose four pillars are the following: Supporting employment creation, extending social protection, safeguarding rights at work and promoting social dialogue. The above-mentioned pillars are embedded in the new 2030 Agenda for Sustainable Development (ILO, *Decent work*, n.d.).

4.2 *United Nation's Initiatives that Promote Decent Work in the Tourism Sector and Socially Responsible Tourism*

4.2.1 The New 2030 Agenda for Sustainable Development

The 2030 Agenda for Sustainable Development was launched by a UN Summit in New York on 25–27 September 2015. The main purpose of this agenda is to have achieved a frame of work by 2030 by promoting equal rights for both men and women, as well as decent work conditions based on inclusive and creative policies which will support the growth of smaller enterprises.

Tourism is viewed as a highly important issue on the 2030 Agenda for Sustainable Development as it is included in specific goals and targets of the agenda, namely in target 8.9 (“By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”), target 12.b (“Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products”) and target 14.7 (“By 2030, increase the economic benefits to Small Island Developing States and least developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism”) (ILO, *ILO guidelines on decent work and socially responsible tourism*, n.d.).

Furthermore, UNWTO has introduced “Global Report on Women in Tourism, second edition,” in collaboration with UN Women, the German Development Agency GIZ, World Bank and Amadeus. This report looks into the role of tourism in the implementation of the Sustainable Development Goal 5 whose aim is to accomplish gender equality and women and girls empowerment (UNWTO, *Global Report on Women in Tourism—Second edition*, n.d.).

4.3 *European Initiatives and Instruments Towards a Decent, Fair and Sustainable Work in the Tourism Sector*

The EU through legal binding and non-legal binding documents and other initiatives strives to promote decent work for all, full and productive employment and poverty reduction across the EU. According EU's ambitious targets regarding employment and training by 2030, at least 78% of the population aged 20–64 should be in employment by 2030, while at least 60% of all adults should be participating in training every year by that year (European Commission, *The European Pillar of Social Rights Action Plan*, n.d.). In this context, worth mentioning are, inter alia, the following:

Article 31 of the legal binding Charter of Fundamental Rights of the EU (EUR—Lex, *Charter of Fundamental Rights*, n.d.), which provides that “every worker has the right to working conditions which respect the worker's health, safety and dignity, which limit the maximum number of working hours, to daily and weekly rest periods

and to an annual period of paid leave” (EUR—Lex, *Transparent and predictable working conditions in the EU*, n.d.),

The European Pillar of Social Rights which establishes 20 key principles and rights in order to secure fair and decent working conditions and workers’ social protection and inclusion (European Commission, *Employment, social affairs and inclusion*, n.d.).

The Directive (EU) 2019/1152 on transparent and predictable working conditions in the European Union, whose scope is to improve working conditions by promoting more transparent and predictable employment while ensuring labour market adaptability. Moreover, the Directive introduces minimum rights and updates the rules on the information to be provided to workers concerning their working conditions (EUR—Lex, *Transparent and predictable working conditions in the EU*, n.d.).

The Directive 2003/88/EC of the European Parliament and of the Council of 4 November 2003 concerning certain aspects of the organization of working time.

(European Commission, *Employment, social affairs and inclusion*, n.d.).

The EU Gender Equality Strategy 2020–2025.

Over the last decades, the EU has undertaken significant actions in the field of gender equality, such as introducing equal treatment legislation, integration of the gender perspective into all other policies and promoting women empowerment through the adoption of specific measures. However, taking into account that gender-based inequalities still exist, the EU has introduced the “Gender Equality Strategy 2020–2025,” which sets out policy objectives and actions, so that significant progress will be achieved by 2025 towards a gender-equal Europe. The key objectives of the Strategy are, inter alia, abolishing gender gaps in the labour market; ensuring equal participation across different economy sectors; confronting the gender pay and pension gaps (European Commission, *Gender Equality Strategy*, n.d.).

Furthermore, in the field of safety and health at work, EU has adopted, in order to ensure a high level of protection, relevant European safety and health legislation—including mainly the Directive 89/391—OSH «Framework Directive», with its wide scope of application, and further directives regulating specific aspects of safety and health at work—but also relevant non-legal binding documents, including EU guidelines (such as Council Recommendations, European Commission Communications, EU Social partners agreements and others), EU standards and OSH strategies, contained in the EU Strategic Framework on Health and Safety at Work 2014–2020 (European Agency for Safety and Health at work, *European directives on safety and health at work*, n.d.; European Agency for Safety and Health at work, *European guidelines*, n.d.; European Agency for Safety and Health at work, *OSH strategies*, n.d.).

Furthermore, the European Commission has launched the Strategic Framework on Health and Safety at Work 2021–2027, which provides strategic priorities and actions for improving workers’ health and safety (European Agency for Safety and Health at work, *EU Strategic Framework on Health and Safety at Work 2021–2027*, n.d.)

4.4 Greece's Initiatives Towards Decent and Fair Working Conditions

In the year 2022 was issued the Presidential Degree 80/2022, which codifies all the relevant labour law provisions related to employment contracts, occupational safety and health, fostering of innovative forms of work, wages and working time issues, like the ensuring of adequate minimum wages and of maximum working hours and paid leaves. Furthermore, the codification establishes principles and rights for workers that relate to dignity, equality, access to social and maternal protection and training, fair and equal treatment regarding working conditions, gender parity, workers' protection from harassment, gender-based violence and inequalities.

Apart from the above-mentioned general protective law provisions, special rules have been issued, applicable to tourism workforce, defining specific principles, obligations and rights at work, such as the reemployment right for those occupied in seasonal hotel enterprises (Law 1346/1983) and the provision of the hotel staff with a health booklet and a professional card (Law 1454/1985).

Furthermore, working conditions in the tourism sector, such as minimum wages and salaries, benefits, working hours, workers' and employers' duties and responsibilities, are regulated by Labour Collective Agreements (LCAs), negotiated through collective bargaining by the contracting parties (workers and employers' trade union organizations, of the tourism sector/occupation, enterprise), like the recent Labour Collective Agreement from 15 December 2022, regulating working conditions of hotel enterprises workforce across the country.

According to Greek Law 1876/1990 Labour Collective Agreements are binding workers and employers, who are members of contracting trade unions of the sector or occupation, unless these are declared universally binding, by decision of the Minister of Labour and Social Affairs. Moreover, enterprise-level labour collective arrangements are applicable to all workers of the enterprise (Hellenic Republic, Ministry of Labour and Social Affairs, *Collective Bargaining*, n.d.).

Besides working terms and conditions of third country nationals in Greece (i.e. outside the EU) are regulated by Law 4251/2014 "Immigration and Social Integration Code and other provisions," and from 1 January 2024 by the new Immigration Code (Law 5038/2023) (Hellenic Republic, Ministry of Labour and Social Affairs, *Work for third country nationals in Greece*, n.d.).

In the field of gender equality, Greece meeting the key objectives of the European Strategy for Gender Equality and the requirements of the Council of Europe Convention on Action against Violence against Women and Domestic Violence (Istanbul Convention) has introduced the new National Action Plan for Gender Equality 2021–2025 (Hellenic Republic, Ministry of Labour and Social Affairs, *Gender equality*, n.d.).

In particular, the National Action Plan for Gender Equality 2021–2025 was launched by the Greek Ministry of Labour and Social Affairs in order to ensure women's equal and free participation in the social and political life of the country, as

well as their equal access to work, by introducing interventions aiming at the reduction of the gender discrimination in the workplace, the women's representation in senior management and their recruiting into high-level employment and their access to training, further education and lifelong learning (Hellenic Republic, *National Action Plan for Gender Equality 2021–2025*, <https://isotita.gr/wp-content/uploads/2023/04/National-Action-Plan-for-Gender-Equality-2021-2025.pdf>).

Also, National Documentation Centre (EKT) following the guidelines of the European Institute for Gender Equality and the national policy on the issue of gender equality has developed its gender equality plan, which provides actions towards the promotion of equal opportunities for women and men. The plan is structured around five (5) Priority Axes, of which Priority axis 1 focuses on work–life balance and organizational culture, while Priority axis 3 refers to gender equality in recruitment and career progression (EKT, *National Documentation Centre's Gender Equality Plan*, n.d.).

Furthermore, Greece supports the principles of gender equality through relevant protective legislation (Law 4604/2019 on “Promoting gender equality, preventing and combatting gender-based violence—Regulations for the granting of citizenship—Provisions related to Local Government elections—Other provisions.” According to Art. 21 of the above-mentioned Law, enterprises which promote gender equality, through equal pay policy, equal representation of women and men in senior management, compliance with law provisions related to maternal protection, parental leaves and protection against gender-based violence and harassment are awarded the “Equality Label”).

Last but not least, Greece promotes workers' protection and social security through the technology use.

In particular in December 2020, the Greek Ministry of Digital Governance has launched a Digital Transformation “bible” for the years 2020–2025 outlining a holistic digital strategy.

The Action Plan of the strategy provides the implementation of more than 400 projects in the following sectors: Economy, Development and Innovation, Foreign Policy, Education, Culture, Sports, Employment and Social Affairs, Health, Environment and Energy, Justice, Public Administration, Transformation of Cities and Communities, Transportation, Maritime Affairs and Insular Policy, Tourism, Migration and Asylum Policy (Greek News Agenda, *The Digital Transformation “bible” of Greece (2020–2025)*, n.d.).

The Bible's scope as far as the sector “Employment and Social Affairs” is concerned, to support decent living conditions of employees, to develop their skills, as well as to confront unemployment, through the implementation of 37 digitization projects.

More specifically, projects that are expected to be completed within the next six months in the field of Labour and Social Affairs are, inter alia, the following: Digitization of single-parent household certificates, Single Digital Access Portal to Social Protection, Digital mechanism for data collection and extraction of the Legal Minimum Wage, Digitization of Social Protection Services, Development of a new financial, procurement and HR management system, Development of a new

Integrated Information System for the management of employment and unemployment policies, Integrated Information System for the Management of Vocational Training Programs (Training Management System-TMS), Information system for matching labour supply and demand using artificial intelligence, Development of digital services with extensive use of interoperability for the direct benefit of citizens and businesses (Smart e-services), Integrated Information System for Health and Safety at Work, Single Information Portal of Ministry of Labour for all programs across the country for work and the fight against unemployment, Code Harmonization and Restoration of a Single Flow of Employment and Insurance Data, Digitization of Working Time. Automation and Capture of Working Time Changes (Hellenic Republic, *Digital Transformation Bible 2020–2025. Labour and Social Affairs*, n.d.).

5 Final Considerations

As already mentioned above, during the last years, significant actions have been undertaken at international, European and national levels towards the promotion of socially responsible tourism and of an inclusive economic growth in the tourism sector. Nevertheless, in order to maximize the sustainable growth potential of the sector and to ensure the transition towards a just and inclusive labour market for all workers, more tourism policies and interventions are necessary, like fostering innovating forms of employment, investing in workers' job satisfaction, motivation and in the development of skilled tourism workforce, through targeted education and training, especially for migrants, youth and women employers, promoting sustainable tourism enterprises, encouraging business development, by adopting of a conducive legal framework, especially for women's and youth entrepreneurship, introducing supportive policymaking, like visa, job and occupational facilitations, raising awareness by promoting social dialogue and strengthening controls and law implementation. However, addressing labour-related opportunities and policies towards an inclusive and sustainable economic growth of the tourism sector requires a new development vision as well as the engagement and the collaboration of governments, local and regional authorities and communities, employers' and workers' organizations and other tourism stakeholders, along with social partners, the civil society and the academic community.

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Building Resilient Hotel Workforce in the Era of Uncertainties: A Literature Approach



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Abstract The global tourism sector faces an array of challenges that can significantly impact its stability. Within this sector, the hospitality subsector stands out due to its inherent vulnerabilities, largely stemming from its structural characteristics. Hotel business concepts suffer overreliance on external industries and favorable environmental factors. This heightened vulnerability underscores the importance of formulating practical strategies within the industry to not only predict and manage disturbances but also to effectively adapt to them. The realm of tourism literature has witnessed the introduction of various theories and empirical studies aiming to bolster the concept of resilience. Central to most of these theories is the contribution of the employees who work in those organizations. Workforce resilience has been considered to be a developable and trainable skill. However, there has not been a consensus on to what extent individual resilience contributes to overall organizational resilience. The problem was made clearer by the recent disruptions brought about by the COVID-19 pandemic. To delve into this matter, the paper employs a systematic literature review, to dissect various theories and interrogate the place of the workforce in the whole resilience construct. The paper's conclusions emphasize the need for further exploration, proposing the execution of empirical studies. Particularly, there is a pressing need for research in Africa, where data on tourism resilience, specifically within the hotel subsector, is lacking. By conducting such studies, the paper envisions shedding light on the intricate dynamics between employee resilience and the overall resilience of organizations within the tourism sector.

Keywords Workforce resilience · Organizational resilience · Africa · Tourism · Hotels · Hospitality

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257

1 Introduction

The tourism sector all over the world is susceptible to a myriad of disruptions (Calgaro et al., 2014). These multiple stressors disrupt destination livelihoods significantly (Rosselló et al., 2020). Some of the outlined changes include climate change, economic crises, political unrest, terrorism scares, (Calgaro et al., 2014) climate change (Atzori & Fyall, 2018), new competition, changing customer needs, and recent health pandemics, e.g., COVID-19 that reduced hotel occupancies significantly (Senbeto & Hon, 2018). Forecasts indicate that the prevalence of pandemics is anticipated to increase in the coming times (World Economic Forum, 2019).

The larger tourism sector demonstrates immense vulnerability in part due to its over-dependence on auxiliary industries (Atzori & Fyall, 2018), its dependence on the natural and built environment, and the overall goodwill. It is paramount that the industry develops mechanisms to build resilient hotels as resilient organizations contribute to the resilient communities they belong to (Prayag, 2019). Disruption is considered as any critical, mostly unpredictable, event that results in an organizational imbalance (Calgaro et al., 2014). Hotels are important subsets of the larger tourism industry and important to note is that, while many authors have researched tourism organizational resilience, the definition of hotel resilience is still not universally accepted (Schroeder & Pennington-Gray, 2018). If hotel organizations are unable to respond to change, the communities that surround them will equally suffer (Calgaro et al., 2014). Research relating to tourism disasters, specifically the lodging sector and more precisely the hotels, has attracted very many authors in the last three decades, however, the preparedness of these hotels for the disruptions does not seem to grow in tandem (Michael et al., 2017). Whereas there are several measurements of organizational resilience in tourism businesses (Chen et al., 2021; Usher et al., 2020), the extant literature needs to be expanded to better understand the role of the workforce during a crisis (Lim et al., 2020), particularly within the hotel subsector, highlighting significant susceptibility. An integrative review of the COVID-19 and tourism literature by Luthans et al. (2005) outlined employee resilience and leadership as potential areas of research. Most resilience researchers concur that organizational resilience is a dynamic construct and therefore there exists a need to research its antecedent factors (Williams et al., 2017). Resilience literature contends that workforce resilience effects during major crises require more empirical studies (Xie et al., 2023).

The objective of this paper is to comprehensively grasp the contextual aspects of diverse methodologies introduced within the realm of tourism organizational resilience literature, and their specific application in framing the involvement of the hotel workforce. A systematic review of the literature will not only consolidate the findings of the empirical underpinnings but also guide future researchers to focus on the specifics of workforce resilience in the hotel sector. With the overarching goal of addressing the present research gap, this paper endeavors to respond to the below fundamental questions:

- (1) *What role does workforce resilience play in the development of organizational resilience in hotels?*

(2) *What are the antecedent factors of workforce resilience in a hospitality context?*

2 Literature Review

2.1 *Definition and Context of Workforce Resilience*

The concept of resilience is not new and has been researched extensively in various disciplines including Earth sciences, biology, engineering, psychology, and ecology (Williams et al., 2017). The concept has garnered heightened interest within academic spheres, partially due to the heightened frequency of various natural disasters encountered by humanity. As more disruptions, disasters, scares, and pandemics are expected, companies need to develop the capacity to cope in unstable and uncertain times (McCann & Selsky, 2012). In the workplace, some individual employees have demonstrated a higher capacity to cope in uncertain situations than others, this has been considered to be resilience (Winwood et al., 2013). Fundamentally resilience includes two concepts, the existence of a perturbation or disruption, and the ability of the individual to positively adapt as a result (Winwood et al., 2013). The resilience of the employees could be taken as a necessary trait for an organization enabling it to suppress adversities (Lim et al., 2020).

Hotel settings induce stress primarily for two reasons. Firstly, hotels function continuously, encompassing all hours of the day, every day of the week, and throughout the entire year (Brown et al., 2017) and secondly, there are ever-evolving demands of clientele and shifts in technology which contribute to this stress (Sembeto & Hon, 2021).

Authors have looked at resilience at work (RAW) as a developable capability or skill that can be rehearsed and taught and refrained from looking at it as a genetic construct (Rodriguez-Sanchez et al., 2021). Employee resilience has shown connections to various favorable results within the hospitality industry, such as improved financial performance and decreased turnover rates. Notably, empirical research has illustrated that the capacity for resilience among hotel employees significantly bolsters the quality of their service delivery (Xie et al., 2023). It has also been found to moderately reduce the effects of job insecurity caused by the devastating effects of COVID-19 (Aguilar-Quintana et al., 2021). Näswall et al. (2015) viewed employee resilience as the capacity of the workforce to use the resources they have to adapt and prosper amidst disasters and crises. Kuntz et al. (2016) however opine that resilient employee behaviors can be developed and enacted in most work environments, even when there are no disruptions. This paper adopts the definition of workforce resilience from Winwood et al. (2013) to encompass the process of navigating, handling, and adjusting to substantial stressors or traumatic experiences.

2.2 *Workforce Resilience in Tourism*

Resilience literature has provided a number of key dimensions of achieving tourism resilience that focus on the individual level (Jiang et al., 2019a, 2019b). The ability to anticipate, manage, and adapt to both manmade and natural hazards is a current concern of governments, communities, and organizations (Teng-Calleja et al., 2020). Researchers have termed resilient individuals as the cornerstone of organizational resilience (Wang & Ritchie, 2010). Resilience research in tourism demonstrates a clear connection between employees and the organization (Mao et al., 2021). The human factor has been outlined as a major contributor to organizational resilience and can be enhanced by organizational practices (Luthans et al., 2005). The concept of employee resilience has become a topical issue among HR and tourism but has received limited scholarly inquiry (Cooke et al., 2019). Cooke et al., in their analysis, observed that supportive leadership and co-worker support directly influenced employee resilience (Cooke et al., 2019). However, hotel employees are often unprepared to face uncertainties that potentially affect their organizations. Whenever a disruption occurs, a hotel's management and its workforce must be able to assess the possible and associated risks to the business, guests, and the environment and develop capabilities to survive (Brown et al., 2017). This is however not the case in many destinations, including more developed ones. In a study made by Brown et al. in (2017), staff members were found to be lacking information on disaster practices and hotels failed to carefully assess their risks. Astoundingly, the findings of that study concluded that many of the challenges faced by hoteliers after Hurricane Gustav were connected to human resource factors (Lamanna et al., 2012). As noted by (Sonia et al., 2008) building resilient organizations is complicated by the inability to co-join resilient building measures to day-to-day organizational operations including employee development practices. The ability to plan for and manage disruptions should be embedded in management training for tourism professionals (Wang & Ritchie, 2010).

The resilience of tourism organizations, e.g., hotels, is principal to the resilience of tourism destinations, yet there remains a conspicuous scarcity of tourism resilience literature (Chowdhury et al., 2018). Workforce management systems play a crucial role in cultivating essential knowledge, skills, abilities, and additional attributes to develop concepts from the resilience theories on how tourism organizations can become more resilient (Lengnick-Hall et al., 2011). Organizations harness these capabilities, routines, and processes to orient themselves in the face of disruptions. Lengnick-Hall et al. (2011) propose that these elements stem from a fusion of individual-level employee knowledge, skills, abilities, and other attributes (KSAOs), systematically developed and integrated through the organization's human resource management system. These behavioral components can be deliberately cultivated by forming habits and behavioral readiness that prove indispensable during times of disruption (Lengnick-Hall & Beck, 2005). Organizational resilience is built when employees feel free to take risks, in asking questions, make mistakes, and graciously accept and give feedback. Resilient individuals are distinguished by their ability to

forge relationships with others who could share key resources (Lengnick-Hall et al., 2011). Resilience literature has underscored the functions of organizations' workforce in developing a resilience capacity. For instance, Lepak et al. (2004) developed a model that links, human management principles, systems, and employee contributions to develop a capacity for resilience. They suggest, that there is a relationship between a company's strategies and workforce resilience. Similarly, it's posited that particular management policies give rise to distinct reactions and behaviors among the workforce. Each individual business strategy requires a tailored and distinct array of responses from employees, mirroring the intricate relationship between organizational strategy and human capital. Within this framework, the intricacies of a given business strategy exert specific demands on various personnel across different levels and departments within an organization. This dynamic interplay highlights that not only is the alignment of HR policies with the strategic objectives imperative, but also that these policies need to be uniquely molded to cater to the diverse requirements of different employee groups (Lepak et al., 2004). Desired employee contributions are used to mean various employee attitudes, norms, and deliverables that enable organizations to achieve their set objectives (Lepak et al., 2004). These have been outlined as actions and interactions that enrich social and resource networks within and beyond the organization. Specifically, contributions include agile thinking, information sharing, and decision-making (Lengnick-Hall et al., 2011). HR policies, systems, and employee contributions could create a capacity for resilience that transforms individual employee actions into this collective organizational capacity for resilience (Lengnick-Hall et al., 2011). This level of preparedness gives the ability to an organization to spot opportunities that other firms without them, will most likely miss (Annarelli & Nonino, 2016).

Different authors agree the organizational capacity for resilience is a sum total of individual inputs. Organizations that deliberately develop organizational resilience are more responsive to crises and this could be termed as a competitive advantage (Guillén Mondragón et al., 2022). They point to the important role of individual and team resources in organizational resilience (McCann & Selsky, 2012). Several studies have taken a correlational approach between employee capabilities, e.g., skills, work performance, and linking them with organizational resilience (Kim, 2020). This has been confirmed by other studies, e.g., (Lee, et al., 2013). While there is no shortage of studies validating the role of employees in developing resilience (Nyaupane et al., 2021), few studies offer a systematic and holistic approach linking the two constructs.

2.3 Behaviors of Leaders and Colleagues and Employee Resilience

Leadership has been identified as a key issue in developing resilience for tourism organizations and has been recommended to be investigated further (Zopiatis et al., 2021). The behaviors exhibited by leaders have shown to have a positive impact on the

employees, further from the official rewards structure. The characteristics of leaders become particularly crucial when an organization encounters an unexpected crisis. Similar views were recorded by other researchers, especially after the COVID-19 pandemic (Yang et al., 2021). During a crisis, employees need to have the ability to foresee and anticipate the changes (Situational awareness), react positively to those changes, and adapt. (Lee et al., 2013). Different leadership styles could affect the capacity of employees to deal with crises (Shelton et al., 2022). Positive leadership behaviors include promoting feedback giving and receiving, asking for help, proactiveness, and quick decision-making. Recent research on hotels, during the early stages of COVID-19 highlighted a positive correlation between resilient leadership behaviors (vision sharing, leadership of tasks, and change management) enhanced both employee and organizational resilience (Prayag et al., 2023). This was further confirmed in a study by (Senbeto & Hon, 2021) that demonstrated crisis leadership efficacy to strongly mediate the relationship between technological disruptions and employee resilience.

In addition, the support provided by colleagues in the workplace has been demonstrated to yield a positive impact on employee engagement (Nagoji & Mackasare, 2023). When an employee perceives support from their peers, they are more likely to exhibit agility, take calculated risks, make prompt decisions, and offer and seek assistance (Lepak et al., 2004). Support from co-workers facilitates the seamless exchange of knowledge, consequently enhancing performance and competitiveness within the hospitality sector (Rao et al., 2021). The absence of effective knowledge sharing could significantly hinder the transformation of individual resources into organizational assets. Organizational resilience is often an outcome of the cumulative impact of individual practices (Nyaupane et al., 2021).

2.4 Digital Technologies and Employee Resilience

Every facet of technology-enhanced collaboration is poised to become an indispensable component of post-pandemic production systems. Emerging digital methodologies have the potential to expedite the process of skill development and empower employees to cultivate new skills. These innovative techniques include several approaches, ranging from the remote dispensation of training through e-learning platforms to the integration of virtual/augmented reality technologies, designed to acquaint operators with novel responsibilities (Ambrogio et al., 2022). Research focusing on understanding employee resilience in hospitality is limited, specifically regarding technology on employees (Senbeto & Hon, 2021). The technology used in the hospitality industry is changing at a rapid rate and the tourism industry post COVID-19 will involve increasingly depending upon automation technologies (Arsalam et al., 2022). The adept utilization and adaptation of these tools could engender forward-looking systems, capable of proactive response rather than mere reaction, thereby fortifying them against the tumultuous impact of unforeseen disruptions (Ambrogio et al., 2022). The hospitality literature acknowledges the importance

of digital technologies to improve hotel processes (Arsalam et al., 2022), as the hotel organization's attitude and openness to digital technologies could be taken as a dynamic capability for resilience (Hussain & Malik, 2022). Furthermore, the capability of employees to use the available resources, e.g., digital technologies in the hotel, to work even amidst crises and disruptions is considered to be a key ingredient to resilience (Kuntz et al., 2016). The ongoing global circumstances have compelled enterprises around the world to swiftly embrace and implement remote work structures. This transformative shift not only necessitates technological solutions but also underscores the pivotal role of technology-driven cooperation in shaping the future landscape of production and workforce dynamics (Ambrogio et al., 2022). Nambisan et al. (2019) suggest that without this positive attitude and openness to digital technologies, organizations will not realize their full potential or even convert them into key resources. Employee resilience can be considered to be a cognitive ability in which individuals tend to adopt or resist technology (Senbeto & Hon, 2021). To advance this thought, it could also mean the use of technology to share and store information valuable during a crisis.

3 Factors Affecting Workforce Resilience

3.1 Psychological Capital

Psychological capital includes self-efficacy, hope, resilience, and optimism (Lorenz et al., 2016) that have been substantiated as profoundly significant, particularly in the face of workplace disruptions (Mao et al., 2021). Recognized as a crucial resource for organizational effectiveness, psychological factors hold substantial importance (You, 2016). Empirical investigations have demonstrated that the psychological capital possessed by employees substantially impacts their general work attitudes, work-related behaviors, and overall performance (Newman et al., 2014). Adopting a resource-based perspective, the psychological capital of employees emerges as a pivotal asset, capable of influencing their cognitive readiness to anticipate and effectively respond to disruptions, essentially encapsulating employee resilience. When contextualizing these psychological resources within the framework of employee resilience, self-efficacy pertains to an individual's confidence in navigating uncertain environments. Hope involves the ability to persist and remain goal-oriented. Resilience, in this context, encompasses the capacity to endure disruptions, while optimism signifies the anticipation of a brighter future (Pathak & Joshi, 2021).

3.2 Diversity (Age, Gender, Education Levels)

Diversity is understood as the dispersion of individual characteristics within the workforce. In uncertain situations similar to those of the hospitality industry, younger employees have shown higher levels of resilient qualities, such as family enrichment, job satisfaction, and vitality, when compared with their older counterparts. Conversely, the older workforce has demonstrated resilience in areas such as job insecurity and other related factors (Mauno et al., 2013). Having a diverse workforce could make an organization more resilient during uncertainties due to the complementarity of skills and behaviors (Kim et al., 2021). Research has found a potential positive link between diversity and organizational resilience enhancement through the development of various capabilities among teams (Liang & Cao, 2021).

3.3 Skills

Resilience can be defined as the capacity to effectively utilize accessible resources, which encompass acquired skills, for the purpose of navigating and addressing challenges. Presented within a framework for the post-COVID-19 Hospitality and Tourism workforce, Martins et al. (2020) delineated vital competencies, including transferable and interpersonal skills that hold significant relevance amid crises. Consequently, empirical research becomes imperative, in order to assess the nature and extent of their impact on workforce resilience. Social, problem-solving skills, and relational skills have been linked to positivity in coping with uncertain situations in everyday life (De Almeida Santos & Benevides Soares, 2018). Leadership skills, especially self-efficacy, have been seen to play a vital role in turbulent times (Holmberg et al., 2016). Evidence suggests that skills that increase employees' adaptability to organizational changes contribute to building resilient organizations (Amherst et al., 2017). Organizations that equip employees with the right skills to cope with future crises demonstrate higher levels of resilience (Teng-Calleja et al., 2020).

3.4 Length of Service

A research made by Sull et al. (2015) measuring resilience and exploring how work-related demographic factors contribute to employee resilience, an analysis of correlations revealed no discernible link between the length of service and resilience. However, tenure has been observed to hold a notable association with various aspects of satisfaction (Jalal Sarker et al., 2003). Furthermore, job satisfaction has been proven to exert an influence on employees' behavior, consequently, it would be judicious to investigate whether both the cumulative length of service and organization-specific tenure bear any impact on the resilience of the workforce.

4 Vulnerability of the Hospitality Industry in Africa, Kenya's Coast

The International Finance Corporation has singled out the private sector, including the hospitality subsector, as a vital player in advancing climate adaptation and resilience building (Bari & Dessus, 2022). In 2022, the world recorded a total of 387 disasters, 97 of which were in Africa (CRED, 2023). In Africa, droughts and floods are the two major profound natural disasters in terms of social and economic disruption (CRED, 2023). Droughts affected 88.9 million people in Africa and resulted in 2,465 deaths in Uganda, making it the second-deadliest disaster event in 2022 after the European heat waves. The continent of Africa has demonstrated immense vulnerability to the consequences of climate change effects such as floods and droughts largely because of its overreliance on natural resources and minimal adaptive capacity (Bari & Dessus, 2022). IFC has recommended adequate adaptation investments to protect its resources including the workforce. The human and economic impact of disasters is relatively higher in Africa given its substantial requirements for adaptation and the limited financial abilities of most African governments to adapt and build resilience to climate and disaster risks (Bari & Dessus, 2022). In Mombasa, Kenya the flooding experienced in 2006 affected approximately 60,000 people (Awuor et al., 2008). All these, together with the disruption caused by health scares make the tourism industry very vulnerable. There is a need, therefore, to explore how this subsector needs to be resilient as well as its greatest resource, the human capital.

The COVID-19 pandemic brought devastating effects on the Kenyan hospitality sector (Tourism Research Institute, 2020). Like in most destinations' hotels were considered to be non-essential services and were closed or used as quarantine centers. Hotels especially in the Kenyan coastal region have been noted to be more vulnerable than those in Nairobi (Maranga, 2021). After the COVID-19 pandemic, the tourism industry along the Kenyan coast faces strong competition from neighboring regions. For example, Zanzibar, a coastal destination in Tanzania that offers a similar tourism experience to Mombasa attracts 265 visitors per kilometer of coastline in a month, whereas Kenya only manages to attract 158 tourists in the same stretch of coastline. Important to note, is that Kenya's coastal tourism product remains largely underdeveloped compared with international peers (G.O.K, 2022). Previous government policies contend that the hospitality establishment along the Kenyan Coastal Line is characterized by old and dilapidated infrastructure, plummeting revenues, dismal security standards, erratic occupancies, and below-average levels of service (Maranga, 2021). The COVID-19 pandemic could be seen to expose more on the destination vulnerability. Kenya's tourism sector lost approximately 631,000 direct full-time jobs and billions of shielings as workforce income, as a result of the COVID-19 pandemic (Tourism Research Institute, 2020). Mombasa County, the home of the most vibrant city in the region, boasts a flourishing tourism sector, with Mombasa itself accounting for 70% of the total tourism activity along the Kenyan coast (G.O.K, 2022). The endurance of its tourism enterprises, particularly hotels, is crucial for

upholding this essential component of the local economy and employment opportunities. Beyond economic risks, Mombasa also faces glaring climate change risks, for instance, a sea level rise of 0.3 m could submerge most of the Mombasa land mass (Awuor et al., 2008). An increase in ocean levels has the potential to impact the hotel industry significantly, given that a majority of tourism endeavors occur along the coastlines. The combination of unchecked urban expansion exacerbates the already substantial susceptibility in Mombasa to heightened flooding (Awuor et al., 2008). Additional repercussions of climate change encompass the deterioration of cultural heritage and the impairment of the assets that draw tourism to Mombasa.

5 Methodology

This study uses a systematic literature review, to examine the components of organizational resilience and investigates the contributions of the individuals employed within these organizations to this framework. To support these assertions, the study draws upon insights from various authors who have explored organizational resilience within the context of the tourism industry, as found in the existing literature. For the review, the authors utilized databases including PUBMED, ScienceDirect, and Google Scholar. The researchers conducted searches for papers using keywords like ‘resilience in tourism workforce,’ ‘resilience in hotel workforce,’ ‘influencing factors on workplace resilience,’ ‘resilience of employees,’ and ‘organizational resilience in tourism.’ A total of 95 papers were discovered, with publication dates ranging from 2004. Notably, among these, 69 articles were published from 2018 to 2023, highlighting the significant surge in research concerning resilience development within the tourism subsector during the latest years. This interest was also fueled by COVID-19 disruptions that affected the tourism industry globally. The inclusion criteria to select the articles included (1) Language: English, (2) Papers that include topics on tourism industry resilience including workforce and their antecedents.

The researchers further concentrated on the papers that linked the resilience of tourism firms and more specifically hotels to the workforce as summarized in Table 1. The table provides an overview of diverse theories and measures of resilience that have evolved over time. The paper endeavors to deconstruct these theories, scrutinize the role of employees in fostering resilience, identify commonalities, and explore areas of convergence.

6 Conceptual Model

The below conceptual model illustrates the linkage between organization resilience and workforce resilience as well as its antecedents. Figure 1 shows the conceptual model developed by the researchers from the extant literature, where resilient employee actions have been linked to three organizational enablers: leadership

Table 1 Measures of organizational resilience from several theories

Author(s)	Measures/Dimensions of tourism organizational resilience	Role of the workforce (employee)
Brown et al. (2017)	<ul style="list-style-type: none"> • Systems • Organizations • Economics • Communities 	The workforce is part of the system, and they belong to the community
Melián-Alzola et al. (2020)	<ul style="list-style-type: none"> • Strategy • Change • Hotel resilience • Performance 	The employees execute the strategy
Usher et al. (2020)	<ul style="list-style-type: none"> • Vulnerability, • Business planning and operations • Preparedness and recovery planning • Communications • Workforce 	The workforce is central to this dimension and central to the overall organization's preparedness
The Hotel Resilience Initiative	<ul style="list-style-type: none"> • Buildings • Systems • Management 	They are the custodians of the systems as well. Management is also part of the overall workforce
Chen et al. (2021)	<ul style="list-style-type: none"> • Capital resilience • Strategic resilience • Relationship resilience • Cultural resilience • Learning resilience 	The employees build the relationship required They are the custodians of learning
Sonia et al. (2008)	<ul style="list-style-type: none"> • Situation awareness • Management of keystone vulnerabilities • Adaptive capacity 	The workforce develops the agility to adapt during a crisis
Michael et al. (2017)	<ul style="list-style-type: none"> • Individual resilience (people) • Systems resilience (processes) • Supply chain resilience (partnerships) 	This theory highlights the role of individual employees' resilience
Jiang et al., (2019a, 2019b)	<ul style="list-style-type: none"> • Operational routines • Use of slack resources and capabilities • Relationship between dynamic capabilities and slack resources • Tourism organization's demographics affect resilience 	Operational routines by the employees Employees developing relationships

(continued)

Table 1 (continued)

Author(s)	Measures/Dimensions of tourism organizational resilience	Role of the workforce (employee)
Chen et al. (2021)	<ul style="list-style-type: none"> • Capabilities • Routines • Practices and • Processes by 	Employee capabilities, routines, and practices develop the capacity for resilience
Lengnick-Hall et al. (2011)	<ul style="list-style-type: none"> • Psychological safety • Respectful interactions • Diffused power and accountability • Broad resource networks and relationships 	Employee relationships and networks
Lepak et al. (2004)	<ul style="list-style-type: none"> • HR systems • HR policies • Desired employee contribution 	The employee’s individual contribution to the overall resilience capacity
Duchek et al. (2020)	<ul style="list-style-type: none"> • Anticipation stage • Coping stage • The adaptation stage 	How employees anticipate, cope, and adapt to disruptions
Amherst et al. (2017)	<ul style="list-style-type: none"> • Economic resources • Social and political resources • Human resources • Natural and physical resources • Visitor resources 	Human resources as a building block in a destination resilience framework
Sharma et al. (2021)	<ul style="list-style-type: none"> • Government response • Technology innovation • Local belongingness • Consumer and employee confidence 	Employee confidence is at the core of the resilience framework

Source Author’s elaboration

(supportive supervision), learning culture, and a supportive work environment (supportive team and organization) (Kuntz et al., 2016). The conceptual model presented below serves as a visual representation that illuminates the intricate interplay existing between the resilience of an organization and the resilience of its workforce, along with the foundational factors that contribute to these constructs. Figure 1 serves as a visual embodiment of the conceptual framework that has been meticulously formulated by researchers who have drawn upon the existing body of literature in this field. This framework aids in comprehending the dynamics that underscore the correlation between organizational resilience, workforce resilience, and the factors that precede and facilitate these concepts. The researchers, by amalgamating insights from the wealth of existing scholarly works, have effectively devised this visual model to encapsulate their understanding. At its core, the model underscores the interdependency between the ability of an organization to withstand and recover

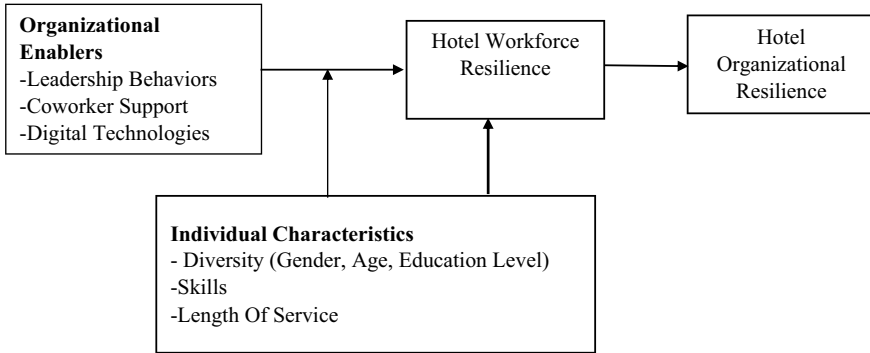


Fig. 1 Interplay between organizational resilience, workforce resilience, and their underlying factors. *Source* Author’s elaboration

from adversities, and the capacity of its workforce to exhibit similar resilience. It becomes evident that these two elements are intricately linked, where the strength of one can significantly impact the other and vice versa. The heart of this model lies in the identification and exploration of the antecedents that contribute to both organizational and workforce resilience. Notably, the researchers have identified three pivotal factors that act as enablers for cultivating resilient employee behaviors within the organization. The first is effective leadership, characterized by a supervisory approach that is supportive in nature. This implies leaders who not only guide and direct but also provide encouragement and a sense of safety, fostering an environment where employees feel valued and supported.

The second enabler is the establishment of a learning culture within the organization. This denotes an environment that encourages continuous learning, adaptation, and growth. Such a culture fosters the acquisition of new skills and the enhancement of existing ones, thereby equipping the workforce to better navigate challenges and uncertainties.

Lastly, the third enabler revolves around creating a supportive work environment. This encompasses both team-level and organizational-level support structures. The presence of strong teams that collaborate, share responsibilities, and offer mutual assistance becomes a cornerstone of resilience. Simultaneously, an organization-wide support network ensures that employees can rely on resources and assistance beyond their immediate teams, enhancing their overall capacity to withstand disruptions. The theoretical underpinning for these enablers draws from the extensive study conducted by Kuntz et al. (2016), who not only conceptualized these factors but also substantiated their influence through empirical research. Thus, the conceptual model aptly captures the intricate web of relationships between organizational resilience, workforce resilience, and the antecedent factors that collectively contribute to the adaptability and fortitude of both the organization and its employees.

7 Discussions and Conclusion

Through an intentional exploration of existing literature, a clear and intrinsic connection between the cultivation of organizational resilience and the engagement of its workforce becomes evident. As the number of disasters is predicted to grow, building resilience, understanding the factors that result in resilience, and dissecting the constructs are paramount. This literature discussion scrutinizes how resilience is built particularly within the dynamic context of the tourism sector, with a specific focus on its application to the hotel subsector.

By developing a theoretical framework, linking workforce and organizational resilience, and discussing implications for further research, this paper lays the groundwork for upcoming empirical investigations. A significant aspect of this endeavor is to assess the extent to which the workforce contributes to the overall organizational resilience and to elucidate the factors that underpin workforce resilience. This focus is particularly pertinent within the context of hotels, and even more so within the African setting, where a dearth of comprehensive data and evidence prevails. Hence, academic empirical research on the relationship between workforce resilience and organizational resilience potentially provides interesting and useful insights into effective resilience management. As the paper uncovers the nexus between these two critical dimensions, it opens up avenues for further exploration, offering a vantage point from which to develop more resilient systems and practices, not only within the tourism sector but across various industries facing escalating challenges.

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Tell Me Where You Are From and I Will Tell You How Much You Get: The Role of Internal Marketing in the Tourism Industry



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Abstract In the tourism industry, employees from different countries and cultures are invited to work together as an integrated team, while the enterprises try to convert this multicultural environment to corporate culture. The main objective of this research is twofold, firstly, to investigate whether the race of an employee in a tourism business is a decisive factor in determining his remuneration, and as well as, what is the role of internal marketing in mitigating, or not, to this discrimination. In order to accomplish these research goals a structured questionnaire was created and distributed to employees and executive managers in the tourism sector. The results support that there are racial discriminations and, indeed, the majority of employees has perceived that there are these discriminations both in salary and job positioning. Moreover, the results show the moderating effect of internal marketing and its importance in fostering culture co-creation, a role that seems to be missing.

Keywords Tourism sector · Racial discrimination · Internal marketing · Wage differentials · Job discrimination · Income inequality

JEL Classification J31 · M31 · M14

1 Introduction

The tourism industry is multicultural, where workers from diverse backgrounds interact with people from different cultures and beliefs. Nevertheless, there is some evidence that employment in the tourism industry is segmented both horizontally and vertically along an ethnicity and racial discrimination line. The conflict theory examines many reasons for wage and racial discrimination. In some cases, there is hiring discrimination, and wage-setting mechanisms have also been held responsible for the pay gap in tourism (Santos & Varejão, 2007). On the other hand, internal marketing

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policies are used to avoid such discrimination or to make employees perceive that it does not exist.

The question of whether the race of a tourism employee is a determinant factor in their remuneration is becoming increasingly topical and attracting research attention. Although some scattered evidence on wage and income discrimination in tourism is available, very little representative evidence exists. This research will explore the issue of racial and wage discrimination in the tourism industry and examine if the race of tourism employees is a determinant factor of their pay. The research will highlight the role of internal marketing and will reveal the importance of fair pay practices and the benefits of a diverse and inclusive workplace. Overall, this research provides a clear and concise overview of conflict theory in sociology and the views of various sociologists on the relationship between race, economic competition, and class conflict.

2 Literature Review

Micro, small, and medium-sized enterprises hold the largest share of the tourism sector and its employees, while also being key drivers of employment (ILO, 2022). The tourism industry relies on a diverse and global workforce and employs migrant workers to fill the skills gap (Grobelna, 2015). Therefore, a significant percentage of the tourism workforce is multicultural and consists of workers of various nationalities. Given that 19.5% of tourism workers in the United States are foreign-born and they are the majority users of temporary work visas in Australia (Australia, 2014). While some migrant workers are either well-qualified or overqualified, many of them are more likely to remain in lower-paid positions (ILO, 2022). The demand for migrant labor can also lead to a “brain drain” of skilled workers from developing countries. However, migrant workers can also gain valuable skills and experience through work abroad that they can use to benefit their home countries (ILO, 2021). Although not all migrant workers in tourism are vulnerable, they are more likely to be in such situations, often working in the informal economy, in poor working conditions, and subjected to exploitation and abuse in recruitment (ILO, 2022).

Fair pay practices are essential in ensuring that all workers, regardless of their race, receive equal compensation for their work. This not only promotes social justice and equality, but it also has several benefits for the workplace and the economy as a whole. A diverse and inclusive workplace can lead to increased creativity, innovation, and productivity, as workers from different backgrounds bring unique perspectives and ideas to the table (Bond et al., 2018). Additionally, fair pay practices can help to attract and retain top talent, reduce turnover and absenteeism, and improve employee morale and motivation (Santos & Varejão, 2007). The principle of equal pay for equal work is recognized as a fundamental human right by the United Nations International Labor Organization (ILO). It is crucial that this principle is upheld in the tourism industry and beyond. In a globalized and interconnected world, the tourism industry plays a significant role in promoting cultural understanding and building bridges between

people from different backgrounds. By ensuring fair pay practices, the industry can lead by example and set the standard for other industries to follow.

Conflict Theory

Although conflict theory is largely inspired by the work of Marx, it also had many other sources, such as the works of sociologist Georg Simmel (Simmel, Conflict and the web of group affiliations, 1908/1955) (Simmel, 1950), Louis Coser (Coser, 1956), Randall Collins (Collins, 1975, 1990), and Eric Olin Wright (Wright, 1985, 2000). While Marx's theory focuses on class struggle, many modern sociologists consider that conflicts are not limited to social classes, but exist between a multitude of groups and interests, between different religions and races, between consumers and producers, taxpayers, and benefit recipients, between southern and northern US states, between inner-city residents and suburbanites, between young and old, etc. (Hudges & Kroehler, 2014; Wells, 1979).

According to this theory, the main source of conflict in human societies is the inadequacy of social and material resources. Power the ability to exercise control over one's behavior and against one's will is what distinguishes winners and losers (Lasswell, 1936). Power also determines which group will succeed in imposing its own standards of behavior (its values). Proponents of conflict theory are interested in how certain groups manage to gain power, dominate other groups, and impose their will on human affairs. They also examine who are the winners and losers of how society is organized (Hudges & Kroehler, 2014).

Marxist school theorists added another element to the conflict approach. They argue that exploitation and racial prejudice emerged in the Western world with capitalism (Geschwender, 1978) and work in favor of capitalists in four ways. First, ideologies of racial superiority legitimize in the eyes of white colonialism and racist practices. Second, racism is profitable because it allows capitalists to underpay minority workers. Third, racist ideologies cause divisions in the working class, pitting whites against other workers. Fourth, capitalists use minority workers as a reserve army that they can fire in times of economic stagnation and rehire in times of prosperity.

Contrary to Marxists, who regard capitalism as the cause of racism, sociologist Edna Bonacich (Bonacich, 1975; Cheng & Bonacich, 2021) argues that tensions between ethnic groups are due to economic competition that develops in binary markets work. The binary labor market is an economic field within which large differences occur in the price of labor of the same professional level. According to Bonacich (1975), when a group sells its labor at prices far below what it is charged, the higher-paid working class feels threatened. Since the cheapest labor comes from a different racial or ethnic group, class rivalry takes the form of racism (Hudges & Kroehler, 2014).

Internal Marketing Practices

Internal marketing is a managerial philosophy with activities that create a bond between the company and its employees (Li & Ko, 2021). A common view in marketing states that a firm must have satisfied employees to be able to satisfy its

customers (Qiu et al., 2022). Employees have a decisive role in providing excellent customer service and determine whether the service meets the customer's expectations (Gounaris, 2008). In line with above, the long-term success of service firms is dependent on employees' satisfaction and motivation (Zampetakis & Moustakis, 2007). Internal marketing practices are used to attract, motivate, and retain skilled employee by using different job tools that can satisfy employees' needs (Berry & Parasuraman, 1992).

The study of internal marketing is examined in three phases: workers' satisfaction, consumers' orientation, and strategy changes' implementation (Chasanah et al., 2021). The initial phase mainly concerns issues related to employee motivation and satisfaction, due to the fact that employee satisfaction is considered a fundamental factor that directly affects customer satisfaction (Rafiq & Ahmed, 2000). In second phase is mentioned the interactive marketing practices. Interactions between a consumer and a business not only influence purchase and repurchase decisions, but more importantly, they influence building a bond that will give a higher market share to the business. To obtain this opportunity, it requires employees who are both market-oriented and sales-oriented (Grönroos, 1982). Therefore, internal marketing objectives in this phase motivate employees to convey the company's philosophy and orientation to its customers (Chasanah et al., 2021). A significant number of researchers considered internal marketing as a means of implementing strategy (Rafiq & Ahmed, 2000), an element that is part of the third phase.

According to Piercy and Morgan (1991), the role of internal marketing as a strategy implementation tool is key to resolving any conflicts between employees and the employee with the business. The importance of internal marketing is found in improving internal communication (Chasanah et al., 2021), reducing isolation between departments, reducing friction between functions in the organization (Li & Ko, 2021), reducing resistance to change and developing employees through training programs, while internal marketing is also applied in the context of change management (Martin, 1992). Research carried out in the hotel sector by Belias et al. (2020) concluded that workers should be well-equipped and trained, with tourism enterprises providing them with training programs to improve workers' skills and knowledge.

Education, communication, perceived benefits, and self-efficacy are the main internal marketing factors on which its practices are based (Back et al., 2011). These dimensions in internal marketing could be broadly categorized into.

- Vision—culture, management style, and leadership
- Communication—formal and informal communication
- Reward systems—compensation and pay and perceived benefits
- Development—training and personal development.

Roberts-Lombard (2010) focuses on the importance of internal communication, including internal discussions, social media and newsletters, and employee self-efficacy, which ultimately increases job satisfaction and self-esteem (Gibbs et al., 2015). Moreover, the direct impact of these incentives on the level of employees' morale and whether enhancement of incentive schemes can retain them in the organization were examined. A well-defined reward and compensation system is crucial

for successful enterprises (Baker et al., 1988). Research has found that training and development can greatly enhance the service and product employees delivered (Back et al., 2011; Berry & Parasuraman, 1992). Investment in training can, thus benefit an organization in different ways, including increasing business performance and enhancing service quality.

3 Methodology

As mentioned above, the rapid increase in tourist demand creates new vacancies that need to be filled immediately. Although tourism does not discriminate, tourism enterprises do not offer the same work environment around the world. The aim of this paper is twofold. Firstly, it examines and compares the characteristics (such as gender, age, education, and country of origin) that tourism companies are using for employees remunerations, in order to understand if they are subject to racial discrimination and impacts on their hospitality career and secondly the role of internal marketing in order to manage these discriminations.

Research Procedure

In order to accomplish the objectives of this study, a questionnaire was used to obtain data from employees in tourism industry. The questionnaire consisted of two parts and adopted from the work of Kaye and Alexander (1995). The first section of the questionnaire examined the respondents' work environment and investigated the respondents' opinion on the role of internal marketing, while the second section described the demographics of the participants. All scales were measured on a five-point Likert scale. To ensure the validity of the questionnaire, a pilot survey was carried out where five people participated. During feedback the participants stated that there were no questions or expressions in the questionnaire that created confusion or ambiguity.

The data were collected by using the Google Forms platform and were distributed through social media (Instagram, Facebook, LinkedIn), and through emails. In addition, with this method of distribution, there was the possibility of reaching employees from different countries and races. In this way invalid answers were eliminated, and the environmental footprint of this work was minimized, as it was not required to print the questionnaire.

The survey took place on winter 2022–23 and data collection yielded a final usable sample of 112 responses. According to Hair (2009), the necessary sample to validate data in multivariate data analysis should be calculated with at least 5 respondents for each independent variable. With a questionnaire of 14 independent items, the minimum of respondents would be 70, meaning the research achieved a very satisfying number of participants.

Sampling Method

The population of this research is considered the workers in tourism. Due to limited time and the need for participants who are tourism employees, it was decided to apply the non-probability sampling technique of purposeful sampling. As defined by Bougie and Sekaran (2019), purposeful sampling is the technique of selecting information-rich participants who could have been selected because of age, gender, status, or experience with the phenomenon. For this reason, the purposeful sampling technique in which the researchers found participants who worked in the tourism sector was essential to obtain the information needed to design an accurate survey (Halikias & Lalou, 2015; Nova-Kaltsouni, 2006). The reliability and validity of the analysis methods that were applied in this research were maintained by the fact that they were used in researches with similar objectives. The design of the questionnaire was based on validated questionnaires.

4 Results

Briefly, the profile of tourism employees is presented below. The main workers in the tourism sector are males and their age (81%) is between 25 and 44 (25–34:52%, 35–44: 29%). The majority of the respondents has an education level after high school, especially a bachelor's degree (38.03%), college graduate (15%), and master's degree (19%). Regarding race, almost 50% of the respondents are Caucasian or white, 20% are Asian, 10% are Black or African American, and all the others are multiracial or other race, whereas their country of work is Greece, United Arab Emirates, UK, Spain, France, Barbados, India, Serbia, Turkey, etc.

In terms of income, most of them (34%) work receiving more than \$3201 per month. However, it is interesting that 31% of respondents receive \$801 up to \$1700 per month. Both of these income categories consisted of employees who work more than 40 h per week (82%), even if they have a contract for fewer hours (50%). The majority of repliers (57%) get two days-off per week, as they have agreed at their contract.

Analysis of Income

Multivariate analysis of variance (MANOVA) was used to examine the effect of income on employees' race. Tests of Pillai's Trace, Wilks Lambda, Hotelling's Trace and Roy's Largest indicated that income was significant dependent on the employees' race. To determine how the dependent variable differs for the independent variables, it was needed to look at the Tests of Between-Subjects Effects table. It was revealed that race had a statistical significant effect on income ($F: 533.42$ sig. 0.000), working hours ($F: 1577.94$, sig. 0.000), and type of employment (574.73 sig. 0.000).

In order to identify the race in which the income differs, Pearson correlation was conducted. There were significant positive correlations of income with Caucasian or

White race ($r = 0.211, p < 0.01$) while Asian, black, or African American, Hispanic or Latino and multiracial were not significantly correlated with income.

		Sig
Asian	- 0.068	0.478
Black or African American	- 0.093	0.329
Caucasian or white	0.211	0.026
Hispanic or latin	0.071	0.457
Multiracial	- 0.04	0.963

A regression analysis was conducted in order to identify the factors that affect the income variable. Considering the variable “Income” as the dependent variable, it was found that the independent variables can explain it in a percentage of 36.5%. According to ANOVA findings, the model was statistically significant with $F = 7051$ and Sig. 0.000. The results show that race/ethnicity ($0.105, p < 0.01$), experience level ($0.277, p < 0.01$), working hours ($0.256, p < 0.01$), day offs ($0.181, p < 0.01$), and type of employment ($- 0.301, p < 0.01$) influence the income statistical significant, while all the other variables, including gender, age, and education did not influence the income. Thus, Hypothesis 1 is supported.

Analysis of Internal Marketing

Internal marketing practices for wage discrimination minimize employees’ perception that they are paid less than workers of other ethnicities. Internal marketing played a dual role in the initial model. Adding internal marketing in the initial model, it not only improved significantly the overall explanation power of model (increase R^2 from 36.5 to 40.5% and F from 7.051 to 10.508, $p < 0.01$), but acted as a moderation factor in income perception ($- 0.273, p < 0.01$). Internal marketing had a directly negative ($- 0.211, p < 0.01$) effect on income.

Thus, as the results reveal, managers when dealing with workers’ income pay greater attention not only to ethnicity but also to experience level, working hours, and day offs. Considering that more attention is needed on the type of employment (permanent or seasonal) and internal marketing practices, which affect income but have negative effects, less important factors seem to be the other demographic characteristics.

5 Discussion

The fair and equal treatment in the workplace is a crucial aspect of social justice and human rights. This study has made a contribution by exploring the effects of racial discrimination on the wage gap in the tourism industry and decomposes it into two parts: one due to differences in the attributes of the employees and the working

conditions and the other, not explained by those differences, which are attributed to enterprises' internal marketing.

An analysis of the contribution of each characteristic to the proportion of the income gap in tourism shows that 40% of the total is due to job and worker characteristics. On the worker's side, experience level and ethnicity are the most relevant sources of wage differences, and on the employer's side, working hours, day offs, type of employment, and internal marketing practices are the most relevant sources.

A comparison of wage discrimination in tourism with what is observed in the rest of the economy shows that wage and racial discrimination in tourism is almost a quarter of it and takes on for the whole of the other industries in Greece (Statistics.gr, 2023). This is because there is minimum wage legislation, which protects low-wage workers of all nationalities. However, the results of this research suggest that the protection afforded by minimum wage legislation to low-wage workers in industries such as tourism may be more effective than equal pay provisions, which can easily be overridden by contracts.

The results of the present study could provide marketing managers of the tourism industry with valuable information for their internal marketing policies. The findings show that internal marketing practices have a direct influence on the employees' income and moderate the relationship between ethnicity and income. Thus, knowing the driving forces that determine the perception of their income could communicate fair labor standards, provide training and education opportunities, and promote collective bargaining.

It is important for governments, employers, and industry organizations to take steps to improve working conditions and protect the rights of tourism workers, especially in non-developed countries, where tourism employees may lack access to benefits such as health insurance and retirement plans or have limited opportunities for professional development and advancement. It is the responsibility of governments to enforce and implement laws and regulations that guarantee the protection of workers' rights, including those in the tourism industry. This includes adhering to international labor standards, such as ratified ILO Conventions, and ensuring that these rights apply to all workers, regardless of their employment status, including those in both formal and informal economies with unstable employment (ILO, 2022).

Even though the research has been developed on a rich theoretical background, as in any research project, this study has several limitations that need to be mentioned. The origin of the sample constitutes a major limitation. Studies of larger samples and in many other countries are needed in order to validate the present findings and generalize the results. More research is needed, to examine the complexity and the specific practices of internal marketing. Studies have found that the behavior of firms can change depending on the complexity of the industry. Therefore, future research should investigate racial and wage discrimination, and whether the results obtained in this study differ if applied only to specific sectors of tourism, such as hospitality, transportation, etc.

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To Stay or to Go! Exploring the Impact of Turnover Intention, Retention Strategies and Employee Surveys on Tourism Employee Retention in Zimbabwe



Barbara Mutadzakupa, Magdalena Petronella Swart, and Ciné van Zyl

Abstract This paper discusses the importance of employee retention in Zimbabwean hotels. The paper argues that work experience and a conducive work environment are not enough to ensure employees stay in their jobs. Tourism employees prefer places of work that offer exclusive, attractive work-life balance policies that are inclusive of retention strategies. This paper, therefore, examines the relationship dynamics among the dimensions of turnover intention, retention strategies, and employee surveys. A cross-sectional survey was conducted on a purposive sample of 443 hotel employees in selected Zimbabwean hotels. A confirmatory factor analysis (CFA) and structural equation modeling (SEM) was employed to analyze the quantitative data. The study found that talent management strategies, hotel employee behavior, and the antecedents thereof in the workplace are important for enhancing retention at the workplace. The study delivered an empirically tested tourism employee retention (TER) model for enhancing retention at the workplace. Practical interventions for organizational and industrial purposes in terms of the model were recommended. The paper contributes to the body of knowledge on employee retention in the tourism industry and highlights the importance of adopting human resources (HR) practices that attract better applicants, retain productive employees, and reduce work-life conflict to enhance customer satisfaction experience and organizational performance.

Keywords Tourism employee retention · Turnover intention · Job satisfaction · Employee surveys

JEL Classification Z39 Tourism · Other/Z31 Tourism · Industry Studies

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1 Introduction

Employee turnover in the hospitality industry is a critical issue that has far-reaching implications on recruitment, training, productivity, and sales (Kerzner, 2018; Silzer & Cober, 2018). To remain competitive, hotels need to attract and retain high-performing employees who understand how to meet customer expectations (Kandampully et al., 2018). However, many hotels only focus on retention when employees show signs of leaving, which is not a sustainable retention strategy in the long run (Silzer & Cober, 2018). To reduce staff turnover, hotel leaders must work with the human resources (HR) department to establish effective retention processes and programs (Silzer & Cober, 2018).

Research studies on hotel employee retention have shown a range of factors that influence employee retention, including fair treatment, job satisfaction, pay and benefits, work-life balance, supportive organizational cultures, trust, employee engagement, working conditions, and professional development opportunities (El Boghdady & Elsayed, 2019; Gursoy et al., 2018; Kim & Lee, 2020; Koomson & Agyekum, 2018). Additionally, a Price Waterhouse Coopers (PwC's) report on the hospitality industry in Africa identified low salaries, limited career growth opportunities, and poor working conditions as contributing factors to high employee turnover rates (PwC, 2019).

Hospitality businesses that fail to address the challenges of employee retention risk losing skilled employees and struggle to remain competitive. Thus, retaining top-performing employees requires creating fair and supportive work environments, offering opportunities for professional development and growth, ensuring competitive pay and benefits, and fostering employee engagement (Gursoy et al., 2018; Kerzner, 2018; Kim & Lee, 2020; Koomson & Agyekum, 2018).

Based on the literature review of various studies on employee retention in the hospitality industry, it is evident that turnover intention, retention strategies, and employee surveys have an impact on tourism employee retention pronouncements. Hotels need to focus on people, customer satisfaction, society, and key performance results to remain competitive (Almeida & Ribeiro, 2019; Kerzner, 2018). Thus, hotel leaders must take proactive measures to retain high-performing employees, work with the HR department to establish effective retention processes and programs and address the challenges of low salaries, limited career growth opportunities, and poor working conditions to retain skilled employees.

In this study, tourism employee retention (TER) is explained from an employer's perspective as the employee's intrinsic drive is reflected in staying on the job within Zimbabwean hotels. This research defines the three dimensions of TER as unique attributes undertaken by an employer are linked to motivating employee retention. The paper commences with the literature of TER to inform the design of the proposed framework. This is followed by the method as applied in the design, the results thereof, and reaching valuable conclusions.

2 Literature Review

Retaining top talent is a significant concern in the hospitality industry, where a shortage of skilled employees is predicted (Kim & Lee, 2020). Employee retention refers to an organization's ability to retain its employees, and many consider it a strategy to retain their workforce (Olaleye & Afolayan, 2021). Employers can decrease the associated costs of high turnover by improving retention rates through lessons learned from organizational behavior concepts (Sturges & Guest, 2019). However, positive turnover, whereby only high-performing employees are retained, is also a strategy some employers employ (Olaleye & Afolayan, 2021).

The literature on employee turnover is vast, and factors that cause employees to quit have been identified (Sturges & Guest, 2019). However, factors that compel employees to stay are less understood (Sturges & Guest, 2019). Cost related to replacing an employee can be 50–60% of the employee's annual salary, while total costs to the organization can reach 90–200% of the employee's annual salary (Kim & Jogaratnam, 2010).

Earlier studies on retention analyzed why employees leave, while later studies focused on factors that influenced employees to stay. Attitude and behavioral changes of employees toward work and work relationships were found to predict turnover (Fishbein & Ajzen, 2010; Güntay & Güntay, 2018; Kim & Lee, 2020). Expectations of employees from the company were also found to be a significant factor (Kusluvan et al., 2010). The retention of tourism employees involves a holistic approach based on talent management and training. It is necessary to develop and test a model of retention strategies for hospitality employees specifically in Zimbabwe to understand whether there are differences according to the background of the hotel (Güntay & Güntay, 2018; Kusluvan et al., 2010; Peña & Villasalero, 2010).

Tourism Employee Retention Dimensions

Therefore, three dimensions were identified for the measurement of the tourism employee retention construct, namely, *turnover intention* (Güntay & Güntay, 2018; Kato & Mynard, 2019; Kuria et al., 2012; Medina, 2012; Pak & Kim, 2019), *retention strategies* (Choi et al., 2020; Lee et al., 2018; Pak & Kim, 2019; Zhang et al., 2019), and *employee surveys* (Choi, et al., 2020; De Jonge & Peeters, 2019; Kapoor & Manthiou, 2018; Ng et al., 2020; Scarlett, 2011). The identified dimensions are shown graphically in Fig. 1.

Turnover Intention

Employee turnover is a critical problem in the hospitality industry due to its reliance on the "human factor," and it can have significant financial and moral impacts. Researchers have studied the causes of employee turnover, which vary based on the context of the organization, such as work umbrage, unfavorable working conditions, stress, long working hours with minimal wages, and poor training programs (Kuria et al., 2012). Efforts to retain employees should focus on valuable and contributing employees, but employee turnover is also the result of deeper issues, such as low

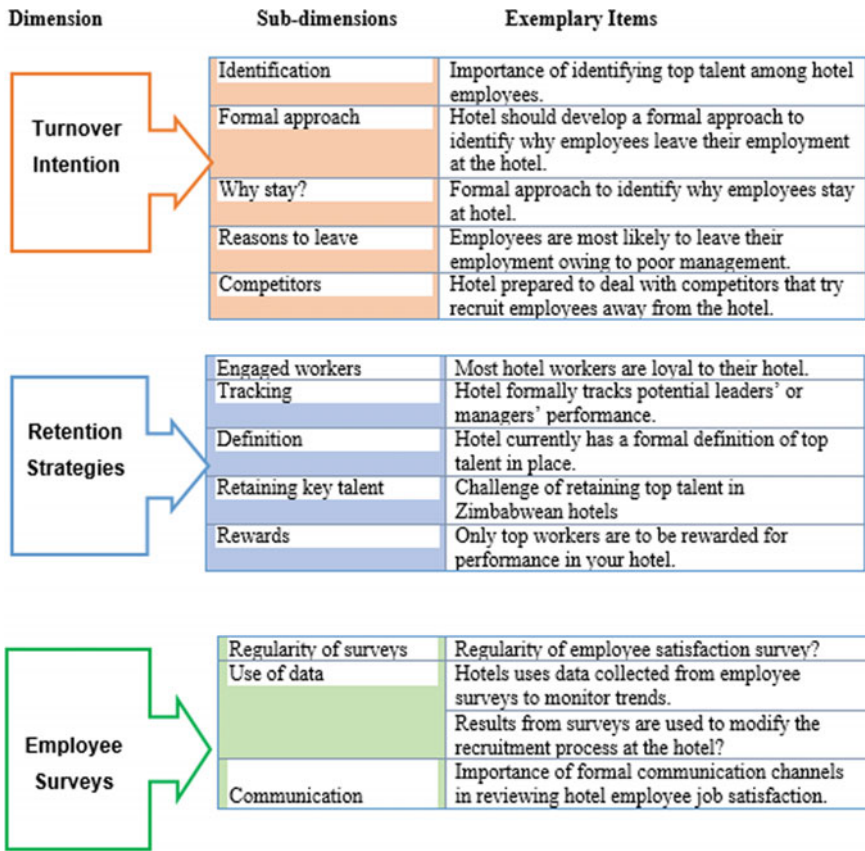


Fig. 1 Proposed tourism employee retention construct. Adapted from Choi et al. (2020), De Jonge and Peeters (2019), Guntay and Guntay (2018), Kapoor and Manthiou (2018) Kato and Mynard (2019), Kuria et al. (2012), Lee et al. (2018), Medina (2012), Ng et al. (2020), Pak and Kim (2019), Scarlett (2011), Zhang et al. (2019)

morale, lack of recognition, or poor employee-manager relationships (Blomme et al., 2010). Although pay is typically believed to play a significant role in turnover, it is not always the primary factor (Mitra et al., 2011).

The intention to quit typically starts when the employee experiences an unfavorable situation or lacks job opportunities (Choi et al., 2020). Training and developing personnel, retaining talent, and enhancing work performance to improve company performance are daunting tasks for most hotel managers (Frolick & Ariyachandra, 2006). Employee turnover can impede customer service quality, reduce morale, and weaken a business's reputation, and managing involuntary turnover can lead to job insecurity and status changes (Sturges & Guest, 2019). Identifying top talent, formal approaches to identifying turnover, and understanding the reasons why employees

stay or leave are critical to managing employee retention (Güntay & Güntay, 2018; Kato & Mynard, 2019; Kusluvan et al., 2010).

Turnover intention is a vital element of the TER, and investigating its sub-dimensions, such as *identification*, *formal approach*, *why stay*, *reasons to leave*, and *competitors* as postulated in Fig. 1 can help resolve turnover (Mak & Sockel, 2019; Medina, 2012; Pak & Kim, 2019). These strategies can be applied to the Zimbabwean context (Lam & Ozorio, 2012).

Retention Strategies

Inopportunately, Zimbabwe's perceived depressed economic cycle negatively impacts hospitality entities' ability to engage in full-scale retention strategies that require substantial financial investment, including top-performer profiling, career pathing, employee engagement, and competitive compensation (Kim & Lee, 2020; Sturges & Guest, 2019). Instead, retrenchments have become common practice in hospitality board meetings, although alternative programs such as employee surveys, top-performer profiling, morale-boosting, and competitive compensation are implemented to retain critical employees (Jepngetich & Njue, 2013).

A crucial aspect of corporate strategy is incorporating retention strategies for high-performing talent, as employee turnover can be costly and disruptive. These strategies may include top-performer profiling, morale-boosting, competitive compensation, and non-monetary reward and recognition to increase employee value (Kapoor & Manthiou, 2018; Kim & Lee, 2020). Job satisfaction is positively related to employee retention, while job dissatisfaction may lead to employee turnover (Jepngetich & Njue, 2013). Providing work-life balance (WLB) policies, such as flexible working hours, training, breaks, and support can contribute to retention (Güntay & Güntay, 2018; Kusluvan et al., 2010; Maxwell et al., 2004). Training quality is also positively related to training satisfaction, job satisfaction, and intention to stay (Chiang et al., 2005). Overall, investing in retention strategies can benefit both employees and the organization.

According to Choi et al. (2020) and Sturges and Guest (2019), the sub-dimension of *engaged workers* accounts for over 75% of the hotel's total talent and is more productive than their disengaged counterparts. Furthermore, *tracking* potential leaders' performance, is achievable through efficient performance management systems implemented within the organization (Zhang et al., 2019). Other sub-dimensions that support investigating retention strategies for TER include *defining top talent*, *retaining key talent*, and *rewarding employees* (Lee et al., 2018; Pak & Kim, 2019) as outlined in Fig. 1.

Employee Surveys

Employee surveys are a valuable tool for measuring competencies, and job satisfaction and identifying issues that employees may be facing in the hospitality industry (Choi et al., 2020; De Jonge & Peeters, 2019). Regular surveys are important for developing retention strategies, and face-to-face and telephone surveys may produce the most accurate insights (Kapoor & Manthiou, 2018). An independent third party

conducting the survey can promote candid responses from employees. However, there has been criticism regarding the personnel conducting exit interviews (De Jonge & Peeters, 2019). Despite this, the implementation of employee attitude and customer satisfaction research has led to the establishment of brand standards for service and operational measures in hotels (Güntay & Güntay, 2018; Kato & Mynard, 2019).

Regularity of surveys, use of data, and communication are sub-dimensions that support the investigation of employee surveys (Choi et al., 2020; Kapoor & Manthiou, 2018; Ng et al., 2020; Scarlett, 2011). Communication is essential to correct any issues identified in the surveys (Choi et al., 2020; Scarlett, 2011). It's important to obtain quality data for factual-based decision-making concerning retention strategies (De Jonge & Peeters, 2019; Ng et al., 2020).

Therefore, the researcher proposes that the subject under discussion has sufficient theoretical evidence to formulate the hypothesis below which is to be tested empirically:

H₁: Turnover intention, retention strategies, and employee surveys inform the development of a tourism employee retention model.

3 Research Methodology

This study employed a quantitative research approach using a constructivist paradigm where the emphasis is on the process of creating knowledge and recognizing the co-construction of research findings by the researcher and participants in studies that explore participants' interpretations and meanings. The research instruments were designed using a mixed methods approach, which included quantitative components. This approach was chosen to overcome limitations associated with solely using qualitative or quantitative methods to address research objectives. The study followed a nine-step approach developed by Creswell and Plano-Clark (2011) to ensure rigorous research methods were employed (Creswell & Plano-Clark, 2011).

To carry out the research, a communication-based study employing self-administered questionnaires was conducted in a field setting (Hameed, 2020). The study sample consisted of hotel employees who had worked for more than three years in 25 hotels across ten provinces of Zimbabwe, estimated to be a population of 11,500. Probability sampling was used, and inferential statistics were employed to ensure the sample met the analysis requirements, with a minimum of 440 responses needed for reliable inferential data. The measurement scale used comprised 88 items (Hair et al., 2018).

Before the distribution of questionnaires, all necessary permissions and ethical clearances [2016_CEMS_ESTTL_001] were obtained from the university (Unisa), the Ministry of Tourism, the Hospitality Association of Zimbabwe (HAZ), and respondents. Confirmatory factor analysis (CFA) and structural equation modeling (SEM) were used to analyze statistics and explore the relationships between the three dimensions. International Business Machines (IBM), Statistical Package for

the Social Sciences (SPSS) Version 28.0, and AMOS V28 were used to analyze the data.

4 Results

The profile of respondents of this study was made up of 56.6% male, between the ages 22–36 years with an undergraduate qualification, working in the food and beverage department. These respondents are non-managerial employees and hail from Harare. Results obtained from the study indicate the high correlations between the items which support the presentation of TER as a single construct. This model, therefore, supports the rationale from a theoretical perspective CFA, confirming that TER can be reliably and validly measured. The standardized regression weights for TER factor loadings are reported in Table 1.

The study conducted a confirmatory factor analysis to test the convergent validity and reliability of the TER scale (Hair et al., 2018). The final scale had five items with standardized loadings of 0.48 (E5) and 0.49 (E6), which were acceptable (Hair et al., 2018). The convergent validity was confirmed, with an average variance extracted (AVE) of 0.31 (below the recommended 0.50 threshold) and composite reliability (CR) of 0.69 (acceptable, but slightly higher than the recommended 0.60 thresholds) (Choi et al., 2020; Fornell & Larcker, 1981; Hair et al., 2018; Mak & Sockel, 2019; Sturges & Guest, 2019). While the AVE suggested model modification was needed, since the CR was within acceptable limits, the study concluded that TER had adequate reliability (Hair et al., 2018; Malhotra & Dash, 2011). Descriptive statistical techniques were applied to analyze the data at the construct level, and Table 2 summarized the model fit statistics (Kapoor & Manthiou, 2018; Lee et al., 2018; Pak & Kim, 2019; Wilson & Hogarth, 2013; Zhang et al., 2019).

Table 1 Standardized regression weights—second-order CFA for TER

Items		Construct	Standardized estimate (β)
E11: How often does your hotel perform employee satisfaction surveys?	<--	TER	0.50
E8: Do you feel that your hotel currently has a formal definition of top talent in place?	<--	TER	0.59
E7: Does your hotel formally track potential leaders' or managers' performance	<--	TER	0.69
E6: In your opinion, do you agree that most hotel workers are loyal to their hotel?	<--	TER	0.49
E5: How prepared is your hotel in dealing with competitors that try recruiting your employees away from your hotel?	<--	TER	0.48

Key TER Tourism Employee Retention

Table 2 TER scale measures of global fit for CPA

Acceptable	CMIN	df	p-value	CMIN/df	GFI	AGFI	NFI	TLI	CFI	RMSEA	SRMR	AIC
			> 0.05	3–5	> 0.90	> 0.90	> 0.90	> 0.90	0.90–0.95	0.06–0.08	0.08–0.10	Min
<i>Baseline—1st order CFA TER model</i>												
	538.7	77	0.00	6.99	0.83	0.76	0.48	0.42	0.51	0.12	0.10	594.8
<i>2nd order CFA TER model</i>												
	6.34	5	0.28	1.27	0.99	0.98	0.98	0.99	1.00	0.03	0.02	26.3

Notes: *n* = 443; *CMIN* Chi-square goodness of fit; *df* Degrees of freedom; *CMIN/df* Relative chi-square; *GFI* Goodness of fit index; *AGFI* Adjusted goodness of fit index; *NFI* Normed fit index; *TLI* Tucker-Lewis index; *CFI* Comparative fit index; *RMSEA* Root mean square error of approximation; *SRMR* Standardised root mean squared residual; *AIC* Akaike information criterion

Table 2 shows the summaries of the TER scale measures of global fit for the 2 CFA models:

The convergent validity was confirmed as $AVE = 0.31$ (<0.50) and $CR = 0.69$ (Hair et al., 2018). Though CR's is acceptable at 0.70, it was bigger than 0.6 to achieve convergent validity (Hair et al., 2018:760), the AVE's however, are below 0.50 (Fornell & Larcker, 1981; Hair et al., 2018) suggesting model modification to adhere to the convergent validity for the TER to be acceptable.

Therefore, since the AVE is a more conservative measure and the convergent reliability is within acceptable limits, it can be concluded that CR for TER is adequate (Hair et al., 2018; Malhotra & Dash, 2011). This model therefore supports the rationale from a theoretical perspective and CFA, confirming that TET can be reliably and validly measured (H_1).

5 Conclusions

The study constructed the retention scale and used SEM to test the reliable and valid development of the tourism employee retention model. From the analysis, the scale retained five items and showed acceptable reliability. Since there was no previous research on the retention scale's validity, this study provided a unique contribution to the field. The findings supported hypothesis (H_1), but with specific reference to the following:

1. competitors (Mak & Sockel, 2019) found in the general tourism business;
2. engaged workers found in general talent management (Choi, et al., 2020; Sturges & Guest, 2019) studies;
3. tracking found in general talent management (Zhang et al., 2019) studies; and
4. definition found in general human resource (Lee et al., 2018; Pak & Kim, 2019) studies; and
5. regularity of surveys (Kapoor & Manthiou, 2018), all formed the final retention scale.

The results of the study affirm the findings of previous research by Kersley et al. (2020) that highly engaged talent is more likely to remain in their job or employment. Additionally, it clarifies the divergent views regarding loyalty as reported in Wilson and Hogarth (2013). By combining these factors, the study provides a more nuanced understanding of TER and emphasizes the need for a supportive working environment to retain talented employees, as well as the importance of developing various retention strategies (Kapoor & Manthiou, 2018).

Contributions of the Study

Significant contributions made to the body of knowledge are three-fold; theoretically, the study provides a comprehensive overview of the key issues related to talent management in the hospitality industry in Zimbabwe.

Methodically, this study contributed to the development of a questionnaire that extensively and reliably investigates tourism/hotel employees and TER.

Practically, it represents a significant contribution to this field of study and can assist in shaping the conversation concerning effective talent management strategies in the hospitality industry.

Implications

Implications for the practitioners and the industry are to help tourism HR professionals choose and implement talent management strategies that enhance organizational growth and success.

Further to, tourism entities that manage to restrain the drain of talent from their businesses to other local and global players will certainly increase job satisfaction and have better motivated and engaged employees that generate better business results. This study will assist tourism players by ensuring that the talent management strategies help to increase value of the organization and preserve its sustainable competitive advantage.

Possible Limitations

Some of the limitations of the study are that the study's reliability and validity may be limited due to a lack of prior research in the field of Zimbabwe's tourism industry.

Additionally, the study's theoretical evidence remains limited due to a lack of preliminary studies in the area of study.

Moreover, the participation of respondents in the study was voluntary, which means that not all respondents may have participated throughout the study. Hence, the respondents who took part in the study might not be entirely representative of the population.

Recommendations for Future Studies

The recommendations for future studies should investigate the different dimensions of the constructs examined in this study, including employee commitment from the management's perspective. Further research could also focus on developing more specific strategies to address talent attrition in the tourism and hospitality industry and assess the impact of these strategies on job satisfaction and employee retention. Implementing these strategies can lead to a competitive advantage for tourism entities.

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The Current State of Business Environment in Slovakia and Its Impact on Tourism Enterprises



Lubica Sebova, Tomas Sokologorsky, and Radka Marcekova

Abstract The business environment is constantly changing. It is mainly influenced by political, economic, technological, and environmental factors. It is therefore necessary to constantly monitor and adapt to the current situation. If there is a good business environment in a country, the country's competitiveness increases, and the market economy grows. The business environment affects all sectors of the national economy, the impact is two-sided. It creates a competitive environment for business and, given the right conditions, attracts foreign investors. The business environment is influenced by several internal and external factors, which are constantly changing. The paper focuses mainly on the political, economic, technical, social, legal and environmental factors (PESTEL analysis) that influence the business environment, with an emphasis on tourism. Although several studies deal with the business environment, almost none of them identify the tourism sector. The object of study are tourism enterprises in Slovakia. The subject of the study is the current business environment in tourism in Slovakia. The aim of the paper is to examine the current state of the business environment in tourism in Slovakia and to define possible opportunities for its further development.

Keywords Business environment · Tourism · Tourism enterprise

JEL Classification L83 · Z32

1 Introduction

The business environment affects and is affected by all sectors of the national economy. It creates a competitive environment for business and, given the right conditions, attracts foreign investors. The business environment is influenced by

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297

number of internal and external factors which are constantly changing. The business environment is examined at a global level through various studies, resulting in indices assessing the quality of the business environment. The most well-known are the World Economic Bank's Doing Business, the Global Competitiveness Index and the World Economic Forum's Tourism Competitiveness Index. In Slovakia, the Business Alliance of Slovakia conducts regular surveys focusing on entrepreneurship of small and medium-sized enterprises in Slovakia, but not especially in the field of tourism. Although several studies deal with the business environment, almost none of them identifies the tourism sector. Therefore, we decided to investigate this area. In this paper, we focus mainly on political, economic, technical, social, environmental and legislative factors (PESTEL analysis) that influence the business environment, with an emphasis on tourism enterprises.

2 Literature Review.

In the literature review, we characterize the internal and external factors affecting the business environment and indices that assess the state of the business environment in different countries based on established parameters.

The business environment is the sum of all external and internal factors that together influence entrepreneurship (Rocha, 2012). It varies from place to place, region to region and country to country. It includes factors and forces such as customers, competitors, suppliers, government and social, cultural, political, technological and legal conditions (Walmsley, 2019). The business environment is dynamic in nature that means, it is constantly changing (Vogel, 2021).

The growth and development of any enterprises and especially of small and medium-sized enterprises, which are typical for the tourism sector, depend on an eligible business environment (Civelek et al., 2016; Meyer & Meyer, 2016). Business activities depend on the business environment, which includes the conditions under which businesses operate and develop their activities (Rozsa et al., 2019). The business environment has a major impact on competitiveness and business growth opportunities of any enterprises (Khan et al., 2019; Kolková, 2020).

The external business environment consists of two areas: the micro-environment and the macro-environment. The micro-environment can be influenced by the enterprise, but the macro-environment is influenced by factors acting in a way that the enterprise cannot control them (Hamilton & Webster, 2015). The micro-environment is anything in the immediate environment including suppliers, customers, competitors and stakeholders. A stakeholder can be considered as any government or other regulatory body.

Monitoring the macro-environment is very important for business entities. It provides important information for the formulation of corporate strategy. The macro-environment is made up of several components: the economic, political, technological, social, legislative, demographic and ecological environment. In the literature,

Fig. 1 PESTEL analysis

the analysis of these factors is most frequently encountered under the names of PEST, PESTEL, PESTLE, STEP, etc. (Fig. 1).

The economic environment is the most important component of the business environment (Dvorský et al., 2022). It is made up of factors that are the result of the country's economy and directly affect the activities of the enterprise. Any change in the economy at the global, international or national level will affect the economic operation of the business. Economic factors include areas such as inflationary tendencies, interest rate trends, the general availability of credit and other means of financing the business, the population's saving of money, the tendency to spend money, etc.

The technological environment is changing and evolving very rapidly. Technology is the foundation of any successful business in modern society. The business that we have today requires the entrepreneur to take note of the ever-evolving technology and keep up. Technology is not only made up of machines, but also scientific thinking that are used to solve problems and promote progress. It consists not only of the knowledge and methods needed to carry out and improve the production and distribution of goods and services, but also of entrepreneurial expertise and professional know-how. Technology includes invention and innovation (Rigelský et al., 2021).

The social environment affects the business environment indirectly. It consists of a range of factors such as social values, culture, beliefs, traditions and conventions, social attitudes, social institutions, class structure and pressure groups. It also includes demographic changes, which are important and can be used as leading indicators in certain areas such as health care and education (Ridderstaat & Croes, 2020). Social values and lifestyles also change over time, and the most important of these, directly or indirectly, leave an impact on the business environment.

The political environment is closely linked to the economic environment and shapes legislation. It is the basis of the laws and regulations within which business manages its affairs. This environment is made up of government agencies, laws and

pressure groups that influence and constrain various organizations and individualistic society. In the business environment, the government acts as a regulator, supplier, competitor and consumer. It has legislative, executive and judicial power in shaping, directing, developing and controlling business activities. The stability of government also greatly influences business and related activities. It sends a signal of strength and confidence to various interest groups and investors.

Legal environment states the legal conditions for doing business (Virglerova et al., 2020). A negative phenomenon of tourism law is the frequent change of legislation. This is the result of a lack of cooperation between lawyers and economists, but also of frequent changes of government parties. Consequently, entrepreneurs are unaware of all and regular changes, thus creating a barrier in the business environment.

Environmental factors include ecological and environmental aspects such as weather, climate, environmental offsets and climate change which may especially affect industries such as tourism, farming, agriculture and insurance. Furthermore, growing awareness of the potential impacts of climate change is affecting how companies operate and the products they offer. This has led to many companies getting more and more involved in practices such as corporate social responsibility and sustainability.

The internal environment is an element of the business environment that consists of the various elements present within an organization that can influence or be influenced by the organization's choices, actions, and decisions. Factors that influence the internal environment of a business include value system, vision, mission and goals, organizational structure, human resources, physical resources and technological capabilities.

The quality of the business environment is assessed by various indices. In the field of tourism, the most used global indices are the World Economic Bank's Doing Business Index, the Global Competitiveness Index and the World Economic Forum's Travel and Tourism Competitiveness Index. In Slovakia, the Business Alliance of Slovakia examines the business environment.

3 Methodology

The paper focuses mainly on the political, economic, technical, social, legislative and environmental factors (PESTEL analysis) that affect the business environment, with an emphasis on tourism. Although several studies deal with the business environment, almost none of them identify the tourism sector. The object of investigation are tourism enterprises in Slovakia. The subject of the study is the current business environment in tourism in Slovakia. The aim of the paper is to examine the current state of the tourism business environment in Slovakia.

We have divided the objective thus stated into two sub-objectives:

SO₁: To examine the business environment in tourism in Slovakia.

SO₂: To monitor and evaluate indices that measure the quality of the business environment in Slovakia.

We start by characterizing the internal and external factors affecting the business environment and the indices that assess the state of the business environment in different countries based on the established parameters. We then process the data on the current state of the business environment in Slovakia, which we obtain from the results of the questionnaire survey. The questionnaire survey is carried out by the research in tourism enterprises. Based on the answers of the respondents, we identify positive and negative factors influencing the business environment in tourism. Next, we present data obtained from selected indices assessing the business environment.

We use the relevant information we obtain from secondary and primary sources to meet our objectives. Primary data were obtained by using the questionnaire method. The means of processing primary data was questionnaire, which was distributed via email communication to tourism enterprises in Slovakia in the spring 2022. We make the output data from the questionnaire more transparent by using descriptive statistics. We summarize the responses obtained by the questionnaire survey in Microsoft Office Excel. The purpose of the questionnaire was to find out how entrepreneurs perceive the current situation in the tourism business in Slovakia.

From the secondary sources we use mainly resources from domestic and foreign authors, scientific articles and journals, proceedings, legislation of the Slovak Republic and Internet sources that are suitable for the purposes of the topic. Data on the measured indices were obtained from published reports of the relevant institutions on their official websites. We focus on World Economic Bank's Doing Business Index (<https://archive.doingbusiness.org>, 2023a), the Global Competitiveness Index (<https://www.weforum.org/reports/the-global-competitiveness-report-2020>, 2023b) and the World Economic Forum's Travel & Tourism Competitiveness Index (<https://www.weforum.org/reports/travel-and-tourism-development-index-2021>, 2023c). Based on the data collected, we compare the data over the span of 2018 to 2021. We apply the methods of analysis and synthesis, deduction and induction to process the data and data from primary and secondary sources.

4 Results

We have divided the results into two parts, each of them is corresponding to stated sub-objectives. First one is dealing with the current state of the business environment of tourism enterprises in Slovakia according to the results of our primary research (SO₁) and the second one is evaluating the business environment using selected indices (SO₂).

The Current State of the Business Environment of Tourism Enterprises in Slovakia

To find out the characteristics of current business environment in tourism in Slovakia, we conducted a questionnaire survey (spring 2022), in which 68 respondents took

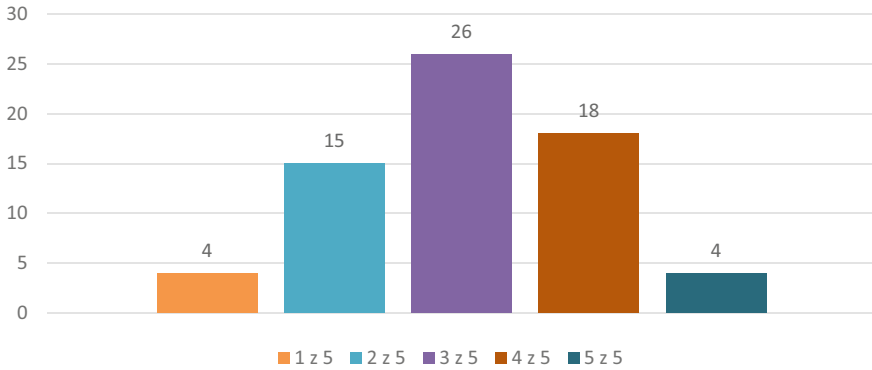


Fig. 2 Satisfaction with starting a business in Slovakia. *Source* Own elaboration, 2022

part. We addressed the tourism businesses. Twenty hospitality establishments, eighteen accommodation establishments, one tourism distribution system company, seven travel agencies, one transport enterprise, five cultural establishments and five spa and wellness establishments, six sports and recreation establishments, and five tourist information establishments were among the respondents. Most enterprises are micro (44.8%), small (43.3%) or medium-sized (7.5%) enterprises. Three large enterprises (4.5%) also responded (one accommodation facility, one sports and recreation facility and one spa and wellness facility).

The results of the survey are shown and interpreted in the charts and tables below (Fig. 2).

Satisfaction with starting a business was rated based on the number of stars from 1 to 5. Based on the survey, only 4 (6%) tourism enterprises were very satisfied with the conditions for starting a business in Slovakia, twenty-six enterprises (38.8%) were moderately satisfied and four enterprises (6%) were very dissatisfied. Tourist information centres and cultural establishments were very dissatisfied with starting a business. When looking at current conditions, as many as fifty-two respondents (77.6%) indicated that they were not satisfied with the current conditions in the tourism industry in Slovakia.

In the survey, we looked at the factors that most affect the business environment. We asked about 29 factors (staff level, staff education, wage level, financial resources of the enterprise, inflation, bank interest rates, management level, marketing level, organizational structure of the enterprise, relations with suppliers, relations with customers, competitive environment, political stability, safety at work, cooperation with local government, city and municipality, transport infrastructure in the place of business, tax and insurance contributions, government support for entrepreneurs, administration, regulation and bureaucracy, legislation, law enforcement and judiciary, innovation and new technologies, technical equipment, lifestyles of citizens, environmental approach, family support, communication with authorities, availability of information for entrepreneurs and use of euro funds) that businesses

indicated whether they were very good, good, bad, very bad or neutral for their business. Neutral responses mean that the factor is partially or not at all relevant to the business (Fig. 3).

We have also prepared a table to better display the results of the survey. The answers are varied, so we cannot specify which factor is more positive and which is more negative for a certain type of tourism business (Table 1).

The questionnaire responses on factors affecting the tourism business environment were categorized according to the PESTEL analysis.

For political factors, we included political stability, cooperation with local government, city, municipality, transport infrastructure in the place of business, tax and

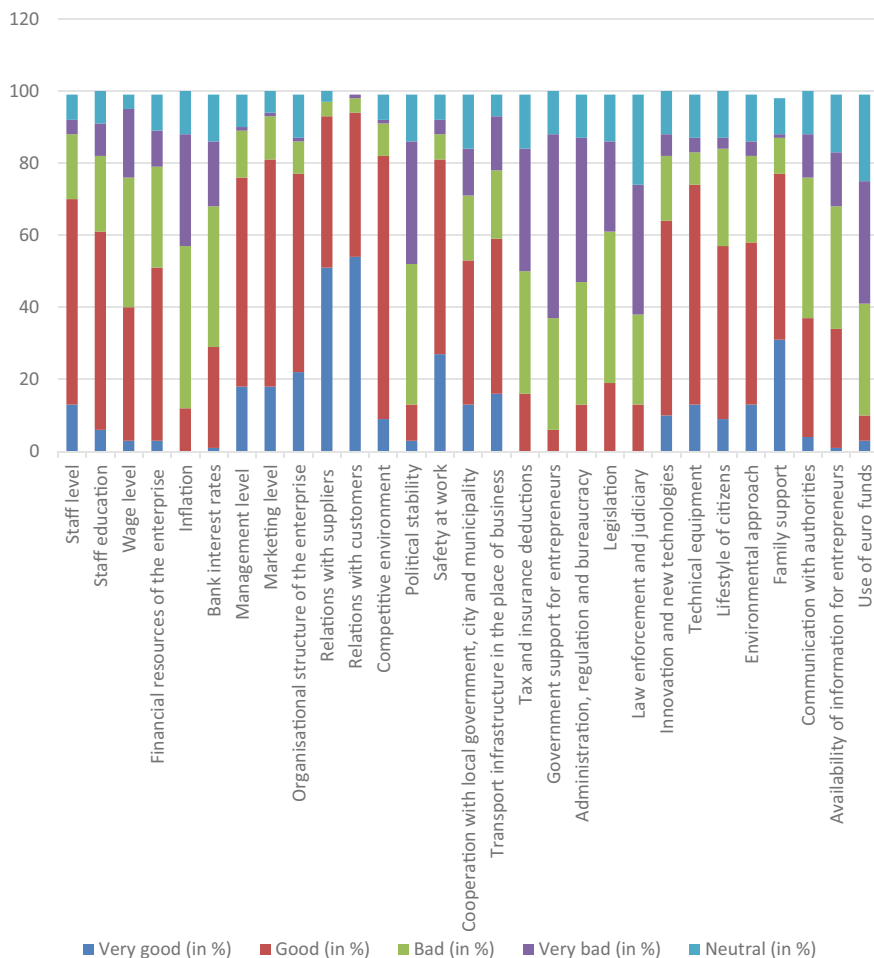


Fig. 3 Factors influencing tourism business in Slovakia. Source Own elaboration, 2022

Table 1 Factors influencing the business environment in Slovakia

Factor/Evaluation	Very good (in %)	Good (in %)	Bad (in %)	Very bad (in %)	Neutral (in %)
Staff level	13	57	18	4	7
Staff education	6	55	21	9	9
Wage level	3	37	36	19	4
Financial resources of the enterprise	3	48	28	10	10
Inflation	0	12	45	31	12
Bank interest rates	1	28	39	18	13
Management level	18	58	13	1	9
Marketing level	18	63	12	1	6
Organizational structure of the enterprise	22	55	9	1	12
Relations with suppliers	51	42	4	0	3
Relations with customers	54	40	4	1	0
Competitive environment	9	73	9	1	7
Political stability	3	10	39	34	13
Safety at work	27	54	7	4	7
Cooperation with local government, city and municipality	13	40	18	13	15
Transport infrastructure in the place of business	16	43	19	15	6
Tax and insurance deductions	0	16	34	34	15
Government support for entrepreneurs	0	6	31	51	12
Administration, regulation and bureaucracy	0	13	34	40	12
Legislation	0	19	42	25	13
Law enforcement and judiciary	0	13	25	36	25
Innovation and new technologies	10	54	18	6	12
Technical equipment	13	61	9	4	12
Lifestyle of citizens	9	48	27	3	13
Environmental approach	13	45	24	4	13
Family support	31	46	10	1	10
Communication with authorities	4	33	39	12	12
Availability of information for entrepreneurs	1	33	34	15	16
Use of euro funds	3	7	31	34	24

Source Own elaboration, 2022

insurance levies, government support for entrepreneurs, administration of administration, regulation and bureaucracy, legislation, law enforcement and judiciary and environmental access. Among the political factors, respondents consider cooperation with local governments, transport infrastructure to the place of business and green approach of business as the most positive factors. 49 respondents (73%) consider political stability as a negative factor and only 9 businesses (13%) rate it positively. 27 respondents (40%) reported cooperation with local government as good, 9 (13%) reported it as very good and 19 businesses (31%) reported it as poor or very poor. Transport infrastructure is good according to 29 respondents (43%), 11 (16%) consider it very good and 13 respondents (19%) consider it in bad condition. Other factors have a very negative impact on tourism business. Tax and insurance levies, government support for entrepreneurs, administration, regulation and bureaucracy, legislation and law enforcement, and the judiciary are the worst ranked of all the factors examined. Considering legal environment legislation is perceived positively by only 13 respondents (19%).

The economic factors included the level of wages of employees, financial resources of the company, inflation, interest rates of banks, management level, marketing level, relations with suppliers, relations with customers, competitive environment and the use of EU funds. The most negative factors are the level of wages, inflation and bank interest rates. For 38 respondents (37%) the level of wages is good, for 24 (36%) it is bad, and 13 enterprises (19%) rated the level of wages as very poor. Only 2 businesses (3%) reported very good wage levels, which are a large accommodation establishment and a small spa and wellness establishment. 32 respondents (48%) indicated that their business' financial resources were good, and 26 respondents (38%) indicated that their financial resources were poor or very poor. Inflation is a major concern for businesses. 51 businesses (76%) reported the inflation factor as bad or very bad for their business. There was also no satisfaction with bank interest rates, where most businesses said that bank interest rates were bad or very bad for their business, 38 businesses (56%). 19 respondents (28%) rated banks' interest rates as good. The competitive environment in the tourism sector in Slovakia is at a good level. 49 respondents (73%) rated it as good, 6 (9%) as very good and only one accommodation business (1%) as very poor. The level of marketing and business management has a positive impact on business. Most enterprises rated these factors at good or very good level. Only one enterprise (1%) of the sports and recreation facility indicated that their level of marketing and management was at a very poor level. The factor of the use of EU funds is rated negatively. Tourism enterprises do not have sufficient access to the use of EU funds, or there are no projects set up to use EU funds, which can help mainly small and medium-sized enterprises. 44 respondents (65%) reported this factor as bad or very bad. 16 respondents (24%) were undecided.

Among the social factors, we examined factors such as employee level, employee training, organizational structure of the enterprise job security, family support and lifestyle of the residents. Most of the enterprises rated the training and level of employees at a good level. Only 4 respondents (6%) reported the training of their employees as very good and 6 (8%) as very poor. 32 respondents (48%) considered

the lifestyle of residents in Slovakia to be good and 18 (27%) considered it to be poor. Family support in business is very important. 52 respondents (77%) have sufficient support from family regarding their business, in 7 cases (11%) they reported this factor as poor. The state is also responsible for regulations associated with occupational health and safety. Their role is to protect employees at work, eliminating workplace accidents and the occurrence of occupational diseases. 50 respondents (81%) said that occupational safety in enterprises is at a good to very good level.

Among the technological factors we included innovation and new technologies, communication with authorities, availability of information for entrepreneurs and technical equipment. Technological environment for tourism businesses is at a good level according to our respondents. 36 businesses (54%) reported that innovation and new technologies are at a good level and 7 (10%) at a very good level. Only 4 businesses (6%) reported innovation as very bad for their business. Also, 41 respondents (61%) reported that their technical equipment was good and 9 (13%) as very good. 3 businesses (4%) have very poor technological equipment. Communication with the authorities and the availability of information for entrepreneurs is bad. 22 respondents (33%) consider communication with the authorities as good, 26 (39%) as poor and 8 (12%) as very bad. The availability of information for entrepreneurs is considered good by 22 respondents (33%), bad by 23 (34%) and very bad by 10 (15%). Considering environmental environment 30 businesses (45%) consider the environmental approach to business to be good, 9 (13%) very good and 16 respondents (24%) bad.

Seven businesses classified in the travel agencies category participated in the survey. These businesses rated their start-ups with three to five stars, meaning that start-up conditions were average to very good. Although the enterprises are ranked in one category their views on the business environment differ. Similarly, half of the respondents representing travel agencies and tour operators said they were satisfied with the current conditions in the tourism business (three out of seven) and half said they were not satisfied (four out of seven). The top ranked factors are customer and supplier relations, staffing levels and staff training. The worst factors were inflation and interest rates (poor and very poor six out of seven businesses). All enterprises were unanimous in their view of government support, which all enterprises rated as poor and one enterprise as very bad.

The tourism distribution system is represented by one enterprise in the survey, which is classified as a micro enterprise. This enterprise commented on average satisfaction with conditions when starting a business (3 out of 5). It rated factors such as organizational structure of the enterprise, relations with suppliers and competitive environment, job security, cooperation with local government, lifestyle of residents, and innovation and technology as the best. He ranked the worst factors as inflation, wage level, political stability, government support, cooperation with local government and availability of information for entrepreneurs.

We received eighteen responses to the questionnaire from accommodation establishments. Seventeen responses were from micro, small and medium enterprises and one large enterprise. The majority rated the start of their business with three stars out of five. Only three of the eighteen respondents are satisfied with the current conditions of tourism business. Accommodation businesses rated inflation, bank interest

rates, political stability, government support for business, administration, regulation and bureaucracy, legislation, communication with authorities and use of EU funds as the worst factors affecting their business environment. They rated these factors as bad or very bad. Factors such as organizational structure, relations with suppliers and customers, competitive environment and family support received the best ratings. Other factors were rated as good in influencing their business.

Hospitality establishments commented on thirteen factors out of twenty-nine that these factors were poor or very poor with respect to their business. There was a split in opinion on two of the factors, namely the business financial resources and wage levels factor, where half of the businesses rated this factor as good, and half of the businesses rated this factor as bad. This response is not dependent on the size of the enterprise. The worst rated factors were inflation, political stability, cooperation with local government, city, municipality, all political factors (tax and insurance levies, government and business support, administration, bureaucracy regulation, legislation and law enforcement and judiciary), communication with authorities, availability of information for entrepreneurs and use of EU funds. Factors, such as relations with suppliers and customers, competitive environment and level of marketing are perceived as the best. Job security, family support, transport infrastructure, technological equipment, innovation and new technologies are also positively rated factors.

We also had response from one small transport company, which rated the start of its business with three stars out of five. The company representative considers the level of wages, the financial resources of the company, inflation and political stability to be very bad regarding his business. He did not cite any factor as very good. The factors he rated as good were bank interest rates, management level, organizational structure, supplier and customer relations, competitive environment, job security, cooperation with local government, technological factors and family support. He rated the other factors as poor.

Cultural establishments expressed that they are not satisfied with the current conditions for tourism business. They were also not satisfied with the conditions to start a business. Only one business was maximally satisfied with the conditions for starting a business, the other four were not satisfied at all (rated one or two stars out of five). Negative factors influencing their businesses include wage levels, financial resources, inflation, political stability, transport infrastructure, all political factors, innovation and technology, technical equipment and the use of EU funds. Factors such as staffing levels, management levels, marketing levels, organizational structure, relationships with suppliers and customers and family support were positively commented on.

Two out of five respondents of spa and wellness establishments are satisfied with the current conditions for doing business in tourism. Likewise, two businesses were satisfied with the conditions for starting their business. Factors that badly affect the business in spa and wellness establishments are inflation, government support for entrepreneurs, administration and administration and the use of EU funds. The positive factors included the level and training of employees, the level of wages, the financial resources of the enterprise, the level of marketing, the organizational

structure of the enterprise, relations with suppliers and customers, the competitive environment and work safety.

Sport and recreation establishments were neither satisfied nor dissatisfied with the conditions for starting a business; also, five out of six respondents said that they were not satisfied with the current conditions for doing business in the tourism industry. They consider the best factors for their business to be the level of marketing, relationships with suppliers and customers, competitive environment, job security, cooperation with local governments, innovation and new technologies and family support. Factors that are bad for business are: level and training of employees, wage levels, inflation, interest rates and political factors.

Tourist information centres were largely dissatisfied with the conditions for starting a business. Three out of five businesses were satisfied with the current conditions for doing business in tourism. Considering their business activity, they perceive the level of wages, inflation, government support for entrepreneurs, legislation, communication with the authorities and the use of EU funds as negative factors. Positive factors are the level of employees, the level of marketing, relations with suppliers and customers, safety at work, competitive environment, cooperation with municipalities, transport infrastructure, innovations and new technologies, technical equipment and availability of information for entrepreneurs.

Assessment of the Business Environment Using Selected Indices

We assess the business environment in Slovakia through selected indices of doing business, global competitiveness index and tourism competitiveness index (Table 2).

According to doing business index Slovakia is ranked 45th (score 75.6) of 190 global economies in 2020. As we can see in Table 3, Slovakia achieved the best score in the field of international business. This activity considers the time and costs associated with the logistical process of exporting and importing goods. It measures

Table 2 Doing business index of Slovakia in the years 2018–2020 (score)

Activity/Year	2018	2019	2020	Ranking in 2020
Starting a business	82.0	82.0	84.8	118
Dealing with the building permit	59.3	59.3	59.4	146
Getting electricity	83.2	83.2	83.3	55
Registering property	90.2	90.2	90.2	8
Getting a loan	70.0	70.0	70.0	48
Protecting minority investors	56.0	56.0	56.0	88
Paying taxes	80.5	80.6	80.6	55
International/foreign trade	100.0	100.0	100.0	1
Enforcement of contracts	64.3	66.1	66.1	46
Dealing with insolvency	66.1	66.9	65.5	46

Source Own elaboration according to <https://archive.doingbusiness.org/en/doingbusiness>, 2023

the time and costs (excluding tariffs) associated with three sets of procedures—document compliance, border compliance and domestic transport—in the overall process of exporting or importing a consignment of goods. Slovakia achieved better rankings in the pillars of obtaining electricity, registering property, obtaining credit and enforcing contracts. It scores worse in starting a business and registering property, where the documentation and verification process is more complicated. Behind Slovakia's poor score is the waiting time for verification from the tax authorities, which takes 5–15 days. It takes almost a year (300 days) to get a building permit in Slovakia.

In the Global Competitiveness Index, Slovakia is ranked 42nd out of 141 world economies in 2019. Slovakia dropped one place from the previous edition to 42nd place with a score of 67. Its highest score was in macro-economic stability, where it ranked first along with the other 32 countries in the world. It also scored highest in health and infrastructure. In most cases, scores were almost unchanged. This means that the situation in Slovakia's competitiveness is stagnant. Slovakia is running behind in the areas of innovation, which is the driving factor for improving the country's competitiveness (Table 4).

Slovakia ranked 60th out of 140 countries in the index. Slovakia has a positive assessment of price competitiveness and natural resources. Slovakia scores very low in air transport infrastructure and cultural resources and business travel. Compared with the year 2017, Slovakia has dropped significantly in the ranking from 15th place to 29th place in health and hygiene, which is due to a decrease in the number of doctors in the country and a reduction in the number of hospital beds.

Table 3 Global competitiveness index of Slovakia in 2018 and 2019

Area/Year	2018		2019	
	Score	Ranking	Score	Ranking
Institutions	56	55	56	61
Infrastructure	78	33	79	30
Adoption of information and communication strategies	68	35	69	39
Macro-economic stability	100	32	100	1
Health	84	57	82	57
Skills	69	48	70	45
Products market	55	78	53	89
Labour market	60	58	61	64
Financial system	64	54	64	56
Market size	58	60	58	59
Business dynamics	65	45	63	55
Innovative skills	47	43	46	44

Source Own elaboration according to <https://www.weforum.org/reports/the-global-competitiveness-report-2020>, 2023

Table 4 Travel and tourism competitiveness index of Slovakia in 2017 and 2019

	2019 (score)	2019 (ranking)	2017 (ranking)
Business environment	4.1	105	115
Safety and security	5.6	57	54
Health and hygiene	6.2	29	15
Human resources and labour market	4.7	55	56
Adoption of information and communication strategies	5.7	33	36
Prioritization of travel and tourism	4.3	95	98
International openness	3.9	47	46
Price competitiveness	5.4	71	62
Environmental sustainability	4.7	30	16
Air transport infrastructure	2.0	113	124
Land and port infrastructure	4.2	40	38
Tourism services infrastructure	4.4	61	63
Natural resources	3.4	48	56
Cultural resources and business travel	1.6	73	84

Source Own elaboration according to www.weforum.org/reports/travel-and-tourism-development-index-2021/, 2023b

The business environment is not rated very positively in Slovakia, with Slovakia improving its ranking by up to 10 places in 2019, from 115 to 105. This is due to a decline in the total taxes paid and the cost of starting a business in Slovakia. Slovakia's worst ranking, 137 out of 140, is in paying taxes and employee contributions and in the time, which is necessary to obtain a building permit.

5 Conclusion

We analyzed the business environment based on the results of the questionnaire survey as well as through the business environment indices.

In the questionnaire survey, Slovak entrepreneurs expressed, that political factors such as political stability, tax and insurance levies, government support for entrepreneurs, administration, regulation and bureaucracy, legislation, law enforcement and judiciary, availability of information for entrepreneurs and use of EU funds have the worst impact on their business. In addition to these factors, they were also negative about employee wages, inflation and bank interest rates. Among the positive factors, respondents mentioned mainly relations with customers, suppliers, the level of management and marketing, technical equipment of the enterprise and innovations and technologies.

Tourism contributes significantly to the country's gross domestic product and competitiveness. Competitiveness is increased by the creation of new businesses in the country, which is linked to the quality of the business environment. The business environment influences the quality and quantity of all sectors of the national economy. It creates a competitive environment for business and, given the right conditions, attracts foreign investors. The business environment is constantly changing, so it is essential to survey it, identify barriers and propose solutions to eliminate and prevent problems.

In particular, we focused on political, economic, technical, social, legislative and environmental factors (PESTEL analysis) that affect the business environment with an emphasis on tourism. The business environment is addressed by several organizations or institutions in their studies, which have their own assessment parameters, but almost none of them directly identify the tourism sector, so we see many possibilities for improvement.

Slovakia is one of the countries, which is most at risk of economic automation without a digitally skilled population (WEF report 2020). Slovakia scored very low in building "tomorrow's markets", which includes new research and innovation. Social care for children, pensioners and health care are also insufficient. Innovation in infrastructure and communication technologies is the need to succeed. These areas of concern are the biggest challenges for the future in order for the country to prosper and be competitive in the international market not only in the field of tourism.

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The Relationship Between Leadership Styles, Organizational Culture and Group Dynamics in the Hospitality Industry



Angelos Ntalakos, Dimitrios Belias, and Athanasios Koustelios

Abstract Human capital is regarded to be one of the most important factors for the success of a hospitality company. Hotel employees represent the entire hotel company and they are usually considered to be a part of the first impression that the customers gain from the hotel company. According to previous research, the abilities and competencies of the members of an organization (such as a hotel company) are often influenced by the leadership styles which are adopted by the management as well as the organizational culture. So, it is very important to investigate the role that leadership styles and organizational culture play in the formation of group dynamics which is the key factor for creating efficient hotel work teams. The aim of the current paper is to examine the effect (positive or negative) of the variables of leadership styles (such as transformational) and organizational culture on the variable group dynamics in the hospitality industry. Although several types of research have been conducted, which connect leadership styles and organizational culture, there seems to be an empirical gap in the connection between leadership styles, organizational culture, and group dynamics, especially regarding to the hospitality industry. Hence, the current paper aims to shed some light on this gap through empirical research which was conducted on employees of 4 and 5-star hotels. The outcome of the research revealed that there are connections between the abovementioned factors.

Keywords Leadership styles · Organizational culture · Group dynamics · Hospitality industry · Moderating role · Mediating role

JEL Classifications M10 · M12

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313

1 Introduction

The modern antagonistic business environment has been facing a plethora of challenges and crisis (such as economic, environmental, and health crises) (Belias et al., 2023a, 2023b, 2023c; Ntalakos et al., 2022a; Skagias et al., 2023). In order to survive to this unknown environment, every organization and business have to develop strategic mechanisms that will help them gain competitive advantage (Ntalakos et al., 2022b; Viterouli et al., 2023).

Many studies suggest that leadership is the cornerstone in enhancing employees' performance in hotels which highlights the customer-center approach (Jiang et al., 2020). Moreover, the relationships between supervisors and subordinates reflect the relationships between leaders and followers (Belias et al., 2015b; Belias, 2015). Kouzes and Posner (2004) argue that the relationship between those who lead and those who follow is a symbiotic relationship. Recent theories suggest that this relationship between leader and follower should be dynamic and ideas that we should always focus on the abilities of the leader have now been overcome (Brownwell, 2010).

The role of the leader, and more specifically, the leadership style and its impact on group dynamics, highlights a set of interdependent and interrelated relationships which have a common vision that helps to achieve the goals of the organization (Belias & Trihas, 2023; Belias et al., 2022a, 2022b). As a result, scholars should search for the most appropriate leadership style that will contribute to the creation and development of a team with values, sense of vision, and purpose (Sheard & Kakabadse, 2004). These values are directly connected with the culture of the organization (MacNair-Semands, 2000). Thus, it is very crucial to create a behavioral model that will define the leader's interaction with the organizational culture and the team's members so as to highlight a dynamic process in the relationship between group and leader.

The aim of the current study is to create a theoretical and practical model that will investigate the relationships between leadership styles, organizational change and group dynamics regarding the hotel industry. Due to the lack of empirical studies on group dynamics (especially regarding the tourism and hospitality industry) it is essential that a model should be created so as the practitioners would be able to know which leadership style should adopt for a successful outcome in group dynamics.

Hence, this research aims to answer to the following objectives/questions:

- Q1: What is the leadership style that dominates in a hotel company?
- Q2: Which is the type of organizational culture that dominates in a hotel company?
- Q3: Is transformational leadership style connected with group dynamics?
- Q4: Is transactional leadership style connected with group dynamics?
- Q5: Is passive leadership style connected with group dynamics?
- Q6: Which type of organizational culture mediates or moderates the relationship between transformational leadership and group dynamics?
- Q7: Which type of organizational culture mediates or moderates the relationship between transactional leadership and group dynamics?

- Q8: Which type of organizational culture mediates or moderates the relationship between passive leadership and group dynamics?

2 Literature Review

2.1 *The Variable of Leadership Styles*

During the past 30 years, scholars and practitioners have examined the role of different leadership styles on the effective outcome of an organization. According to recent academic bibliography, there are three leadership styles that are mostly examined with a plethora of organizational factors (Avolio & Bass, 2004):

- (a) **Transformational leadership style:** The most common characteristics that this leadership style is based on, are the following: proactivity, development of subordinate's awareness for transcendent collective interests, and motivation of subordinates to achieve extraordinary goals. The dimensions of transformational leadership are the following:
- *Idealized influence (attributed):* This dimension is referred to the social charismatic characteristic of a leader of being confident, powerful and focused on specific high ideals and ethics.
 - *Idealized influence (behavior):* This dimension is referred to the values, beliefs and commitment to organization's mission and target that a leader focuses on.
 - *Inspirational motivation:* This dimension is referred to the leaders' characteristic to motivate their followers to be optimistic, to have ambitious goals, to see a common vision, and to communicate with their followers so as this vision would be accomplished.
 - *Intellectual stimulation:* This dimension is referred to the leader's ability to motivate their followers to think creatively so as to solve difficult problems.
 - *Individualized consideration:* This dimension is referred to the leader's capability to make their followers satisfied by advising, supporting, and paying attention to their needs.
- (b) **Transactional leadership style:** The most common characteristic of this type of leadership is the exchange process that occurs between supervisor and subordinates and it includes a set of objectives and controlling outcome. The dimensions of transactional leadership are the following:
- *Contingent reward:* This dimension is referred to the roles, tasks, requirements which the leader expects from the followers to fulfill. When the followers succeed in fulfilling the needed obligations, then they are materially and psychologically rewarded.
 - *Management-by-exception active:* This dimension refers to the active behavior of a leader who focuses on ensuring that all standards are met.

(c) **Passive leadership style:** This leadership style is also known as no leadership. The dimensions of passive leadership style are presented below:

- *Management-by-exception passive:* This dimension is referred to the leader's behavior to intervene only when noncompliance is occurred or when mistakes have already happened.
- *Laissez-faire:* In this dimension the leader is a person who does not make any decisions, avoids responsibility, and does not want to use his/her authority. In other words, this type of leader avoids taking action.

2.2 *The Variable of Organizational Culture*

One of the key factors for an organization's successful outcome is organizational culture as it has a direct effect on organizational performance, engagement, commitment, recruitment, and competitiveness (Bremer, 2012).

Organizational culture is defined as a set of values, rules, and ethics that are followed by all the members of the organization. Similarly, organizational culture can be characterized by several beliefs, ideas, behaviors, and attitudes that the members of the organization have to pursue so as the working conditions on the organization would be suitable for organization's development.

According to Cameron and Quinn (2006), there are four basic culture types that occur on a working environment (OCAI online, 2023):

- *Clan Culture:* The members of the organization feel very cozy and friendly. They feel as a part of a family. The leaders mentor their followers and they promote teamwork, and participation. As a result a loyal and committed environment is created. The leaders also emphasize in human resources development. The organization's mission is to take care of the needs of the clients and of employees. This type of culture is usually promoted on health care and education institutes as well as not-for-profits organizations.
- *Adhocracy Culture:* The employees of the organization feel that they are encouraged to take risks and be innovative as they are working on a dynamic and creative working environment. The organization's mission is to create new ideas and resources, such as new products or services. Hence, the organization promotes freedom and innovation. This type of culture is usually promoted on technical startup companies and technology-driven industries.
- *Market Culture:* The members of the organization feel competitive and focused on goals and targets. The working environment focuses on targets, deadlines more than human resources. Leaders are usually strong and tough and they have high expectations. The most important factor of the organization is success and win. Hence, the organization gives emphasis on rival activities, reaching goals, and winning on the competitive and antagonistic environment. This type of culture is usually promoted on consultancy, sales, marketing, and services.

- *Hierarchy Culture*: The working environment is very formal and structured. The members of the organization know exactly what to do. Leaders are responsible for making the organization function smoothly and effectively. The key element on the organization is the formality in rules and policies. The organization's mission is the stability and the effectiveness through planning and low cost. This type of culture is usually promoted on medicine, nuclear power, military, and government.

2.3 The Variable of Group Dynamics

One of the most widespread definition of group dynamics is given by Forsyth (2019): *“The influential interpersonal processes that occur in and between groups over time. These processes not only determine how members relate to and engage with one another, but they also determine the group’s inherent nature and trajectory: the actions the group takes, how it responds to its environment, and what it achieves”*.

According to this definition, group dynamics is a complex term which can be identified by a plethora of sub-variables such as the following:

- *Group process*: It includes the type of relationship between two individuals who interact with each other (Yalom, 1995). The key factor in this interaction is the way of communication and the sharing of messages between the parts who interact (Phan, 2001).
- *Group climate*: It includes the group's environment where feeling such as engagement, or conflict, and avoidance often arise (MacKenzie, 1983).
- *Altruism*: It is defined as the situation where the people believe that they have something to offer to other people and that they are needed by others. In other words, it is defined as the ability to put themselves under the need of the others, to help others unconditionally, and to be respected by others (Marcus, 1998; Phan et al., 2004; Yalom, 1995).
- *Universality*: It is defined as the situation where people feel that they are not alone in life experiences. With this feeling, the members of the organization feel that they share common problems with others and thus they are validated and accepted by other members of the group. In addition, universality makes members to understand that pain is also part of life and that each person is responsible for his/her life (Lese & MacNair-Semands, 2000; Phan et al., 2004).
- *Cohesiveness*: According to Yalom (1995) cohesiveness is a complex phenomenon that combines many different concepts. Cohesiveness can be described as the situation where individuals are united as one person feeling respect, likeness, and trust for each member of the group (Forsyth, 1999). Moreover, Frank-Saracini et al. (1998) have described cohesiveness as “emotional closeness among members who feel empathy for each member of the group”. Additionally, cohesiveness is described as the glow that keeps group members in the group. As a result, it includes the concepts of support, acceptance, belongingness, and warmth (Phan et al., 2004).

2.4 The Relationship Between Leadership Styles, Organizational Culture, and Group Dynamics

As it is already mentioned, there is a huge research lack of evidence regarding the connection between leadership styles, organizational culture, and group dynamics, especially as far as the tourism and hospitality industry is concerned.

Leaders have to create the right environment that will contribute to the achievements of the team's goal. This means that they must adopt the appropriate leadership style that meets the needs of the group members. So, the role of the leader's style is very important for ensuring team's unity and cohesiveness (Ntalakos et al., 2022a, 2022b, 2023a, 2023b).

The importance of the above is highlighted in the study of Ramzaninezhad and Keshtan (2009) who investigate the connection between coach's leadership style with the cohesiveness of sports team. More specifically, they conducted a survey on 264 athletes who play in 12 professional teams in Iran. The results of their study showed that the transformational leadership style of the coach has a great impact on team's success and cohesiveness.

The concept of group dynamics and the role of the leader define a complex of relationships between the members of the group with the leader as well as with each other. Effective leadership would ensure that several members can work together as an effective team (Bans-Akutey & Tiimub, 2021). The development of the relationship between the leader and the team depends on whether the leader is able to guide and motivate the workforce. This requires effective leaders whose style and skills can positively influence human resources and team dynamics (Tshidi, 2021). Leaders are considered to be more effective when they express positive emotions as it has been investigating that employees tend to be more creative when they are in an environment promoted by a positive friendly climate (Robbins and Judge, 2018).

According to Rahbi et al. (2017), leadership is related to sustain team motivation. More specifically, Rahbi et al.'s (2017) study focuses on three leadership styles: (a) democratic, (b) authoritarian, and (c) passive, laissez-faire. The aim of their research is to investigate the effect of each leadership style on group dynamics' dimension—group motivation. They conducted a research among employees who worked on health sector in Abu Dhabi (United Arab Emirates). The results of their study showed that democratic and authoritarian leadership styles have a positive correlation with group dynamics motivation, whereas passive laissez-faire style has negative effect on group dynamics motivation.

Regarding the connection between leadership styles and organizational culture, Golden and Shriner (2017) investigated the level that several types of organizational culture interact with leadership styles. The results of their study shows that the culture that is based on competition has no significant relationship with transformational leadership style.

Additionally, Sirin et al. (2018) suggest that both transformational leader and servant leader tend to influence more cultures that are based on long-term trajectory

and sustainability. For example, market organizational culture is more affected by transformational leadership style.

Eventually, according to Belias and Koustelios (2014a, 2014b, 2015), Belias et al. (2015a) research, leadership style is directly associated with organizational culture. More thoroughly, transformational leadership style is related to hierarchy organizational culture (regarding employees who work in bank institutes), while the majority of the sample believes that transformational leadership should promote clan organizational culture in the bank institute where they work.

Consequently, the authors of this research introduce a theoretical and practical model which aim to connect the factors of leadership styles, organizational culture, and group dynamics in the hotel industry (Figs. 1 and 2). More precisely, this model aspires to examine the following hypotheses:

- *H1: Transformational leadership has significant positive relationship with group dynamics.*
- *H2: Transactional leadership has significant positive relationship with group dynamics.*
- *H3: Passive leadership has significant negative relationship with group dynamics.*
- *H4: Organizational culture has significant positive relationship with group dynamics.*
- *H5: Organizational culture mediates the relationship between transformational leadership and group dynamics.*

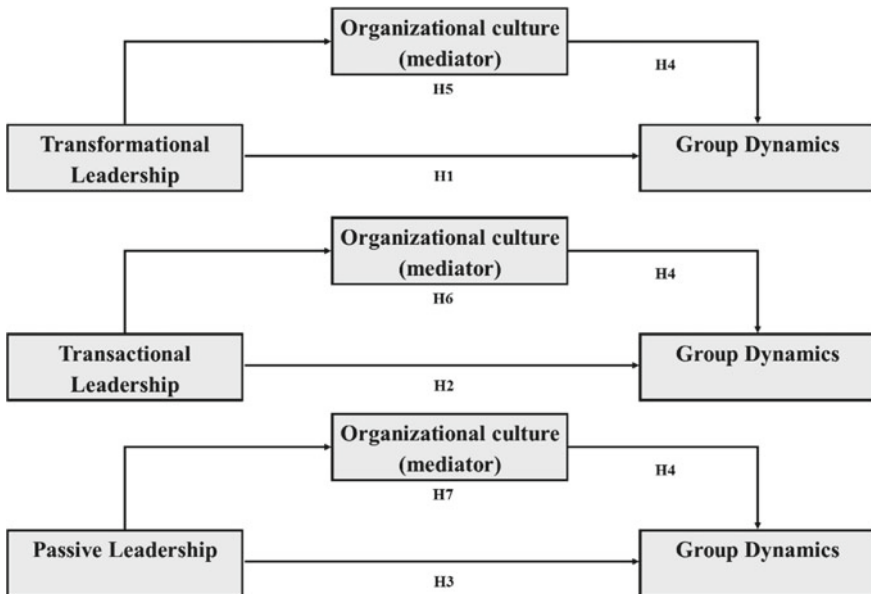


Fig. 1 Mediator role of organizational culture on the linkage between leadership styles and group dynamics



Fig. 2 Moderator role of organizational culture on the linkage between leadership styles and group dynamics

- *H6: Organizational culture mediates the relationship between transactional leadership and group dynamics.*
- *H7: Organizational culture mediates the relationship between passive leadership and group dynamics.*
- *H8: Organizational culture moderates the relationship between transformational leadership and group dynamics.*
- *H9: Organizational culture moderates the relationship between transactional leadership and group dynamics.*
- *H10: Organizational culture moderates the relationship between passive leadership and group dynamics.*

3 Research Methodology

3.1 Participants

The main purpose of this research is the investigation of the relationship between leadership styles, organizational culture and group dynamics. For that reason, a quantitative research was conducted on 366 employees who worked on 4 and 5-star hotels located in Attica, Halkidiki, Thessaloniki, Cyclades Islands, Dodecanese's Islands, Eptanisa Islands, and Crete. All the hotels that participated in this research are

members of the Hellenic Chamber of Hotels Database (HCH, 2023). The researchers contacted the hotel managers via phone and email and received their permission to send the questionnaires to them so as they would distribute them into the hotel's personnel. The personnel was also informed that their participation would be totally anonymous and voluntary and all data would be used only for the purpose of the specific research.

Eventually, the invitation was sent to 234 four and five-stars. One hundred and three hotels agreed to participate in this survey, 29 hotels refused to participate, whereas 102 hotels did not answer. The sampling method that was used was the convenience sample method due to its low cost and the easy accessibility to the sample by the researchers. The form of the questionnaire was electronic. A link was sent to the managers of the hotels for distribution. The electronic questionnaire was hosted on Google Forms during the period December 2022 to July 2023. At last, 366 hotel employees answered the questionnaire with no missing values.

More specifically, the majority of the participants were male married employees, aged between 41–50 years old. Regarding their educational status, most of them had bachelor's degree (114 participants, 31.1%). Their working experience in the specific hotel unit was approximately 1–2 years, while their working experience in the hotel industry ranged from 1 to 5 years. Finally, the majority of them worked in bar/restaurant (88 participants, 24.0%), or management (70 participants, 19.1%), or reception (62 participants, 16.9%). Table 1 describes in details the demographic and working characteristics of the sample.

3.2 Measurement Tools

The research instrument—questionnaire—that was used in this research, consisted of 3 measurement tools. These tools specify the variables of the research: (a) leadership styles, (b) organizational culture, and (c) group dynamics.

Leadership styles are measured via Avolio and Bass (2004) model which is known as multiple leadership questionnaire 5x (MLQ-5x). This tool measures the leadership style that is adopted by the manager of a hotel company. It consists of 45 questions measured on a five-point Likert scale. The values range from 0–4 (0 = not at all, 1 = once in a while, 2 = sometimes, 3 = fairly often, 4 = frequently, if not always). The leadership styles that are measured with MLQ-5x are the following: (a) transformational leadership: This leadership style contains five dimensions/sub-variables: idealized influence—attributes (4 items), idealized influence—behaviors (4 items), inspirational motivation (4 items), intellectual stimulation (4 items), and individual consideration (4 items), (b) transactional leadership: This style consists of two dimensions/sub-variables: contingent reward (4 items) and management-by-exception active (4 items), and (c) passive leadership: This style contains two dimensions/sub-variables: management-by-exception passive (4 items) and laissez-faire (4 items). Eventually, this tool measures the leadership's outcome. The variables

Table 1 Demographic and work characteristics of the participants ($N = 366$)

		Frequency	Percent
Gender	Male	188	51.4
	Female	178	48.6
Age	< 30	102	27.9
	31–40	90	24.6
	41–50	130	35.5
	> 50	44	12.0
Marital status	Single	204	36.6
	Married	134	55.7
	Divorced	28	7.7
Years of employment in specific hotel unit	1–2	146	39.9
	3–5	102	27.9
	5–10	70	19.1
	10–20	34	9.3
	> 20	14	3.8
Years of employment in the hotel industry	1–5	132	36.1
	5–10	70	19.1
	10–15	38	10.4
	15–20	54	14.8
	> 20	72	19.7
Level of education	High school graduate	102	27.9
	College graduate	96	26.2
	Bachelor's degree	114	31.1
	Master's degree	54	14.8
Work section	Reception	62	16.9
	Housekeeping	24	6.6
	Bar/Restaurant	88	24.0
	Kitchen	54	14.8
	Financial office	26	7.1
	Public relations	8	2.2
	Spa	18	4.9
	General duties	16	4.4
	Management	70	19.1

which are used are the following: (a) extra effort (3 items), effectiveness (3 items), satisfaction with leadership (3 items).

Additionally, the factor of organizational culture is measured through organizational culture assessment instrument (OCAI) by Cameron and Quinn (2006). This instrument measures six key dimensions of organizational culture. Each dimension has four alternatives. The sample is instructed to divide 100 points among these four alternatives, depending on the extent that each alternative describes the situation that exists now in the hotel company. Also, the sample should divide 100 points among these four alternatives, depending on how each alternative should describe the preferred future situation that they would like to exist in the future in their working environment. These six dimensions are the following: (a) dominant characteristics, (b) organizational leadership, (c) management of employees, (d) organization glue, (e) strategic emphasis, (f) criteria of success. In conclusion, the measurement of these six dimensions show the organizational culture that exists in the hotel company. The types of organizational cultures are as follows: (a) clan culture, (b) adhocracy culture, (c) market culture, and (d) hierarchy culture.

At last, the final variable of the research is measured through group dynamics inventory (GDI) by Phan et al. (2004). This tool consists of 20 questions which are measured through a four-point Likert scale from 1–4 (1 = strongly disagree, 2 = disagree, 3 = agree, 4 = strongly agree). GDI tool consists of three sub-variables which compose the variable of group dynamics. These dimensions are the following: (a) cohesiveness (10 items), (b) altruism (5 items), and (c) universality (5 items).

3.3 Data Analysis

3.3.1 Descriptive Statistics and Correlations

All data were analyzed with the use of the Statistical Software IBM SPSS Version 25.0 as well as the Microsoft Excel Version 2013. Descriptive statistics (mean, standard deviation) and correlations (Spearman Coefficient or Pearson Coefficient) were performed for all variables and their dimensions. Additionally, the internal consistency of all scales was measured via Cronbach's alpha coefficient. Moreover, factor analysis was executed in order to examine the variability among the observed correlated variables.

3.3.2 Examining the Research Hypotheses

Regarding the examination of the hypotheses, correlation test, linearity tests, linear regression models, and multiple regression models were implemented so as to investigate relationships between transformational leadership and group dynamics, transactional leadership and group dynamics, and passive leadership and group dynamics. Additionally, the mediating/moderating roles of group dynamics in the linkage

between leadership styles and group dynamics were examined via multiple regression models.

3.3.3 Differences Between Moderating and Mediating Role

The mediating role is always confused with the moderating role. Many scholars think that these are the same terms due to the fact that they sound similar. However, they are totally different as they are used for different statistical reasons.

A mediator (mediating variable) explains the process through which two variables are related, whereas a moderator (moderating variable) measures the strength and the direction of this relationship.

More specifically, mediation is used to examine the impact of one or more independent variables on a dependent variable through a third variable that is called mediator. For that reason, the mediator is placed between independent and dependent variable. The purpose is to examine if there is any statistical significance for the indirect effect of the mediator. For that reason all the variables in mediation analysis must have some kind of relationship (correlation) between them (Cucos, 2022).

On the contrary, a moderator refers to the level of change between independent and dependent variables as it is measured through the linear regression coefficient of the product term that is known as the product between the independent variable and the moderator variable. In moderation analysis, the moderator variables does not have a causal relationship with the independent variable (Cucos, 2022).

4 Results

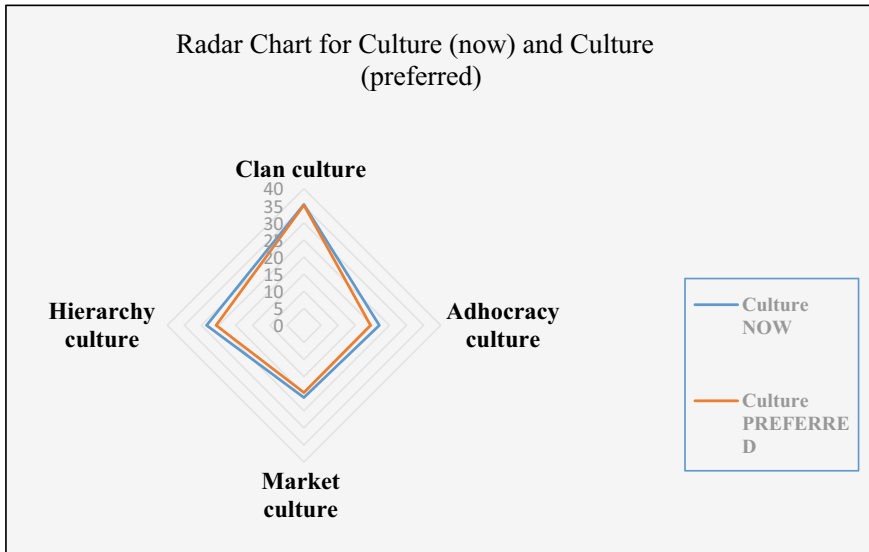
4.1 *Descriptive Statistics, Internal Consistency, and Correlations of the Variables*

Table 2 presents the results of descriptive statistics and Cronbach's alpha coefficient of the variables of the research. According to Table 2, the leadership style that dominates in the hotel company is the transformational leadership style ($M = 2.333$). More specifically, its dimensions idealized influence attributes and inspirational leadership gather the highest scores of mean ($M = 2.444$ and $M = 2.442$, respectively). Similarly, the transactional leadership style seems to be adopted by hotel's management in a significant way, since it scores high values ($M = 2.325$) on both its dimensions (contingent reward $M = 2.352$ and management-by-exception active $M = 2.297$). On the contrary, the hotel managers do not usually implement the passive leadership style since this leadership style (with both its dimensions) scored the lower value on the current research ($M = 1.266$).

Moreover, Graph 1 describes a radar chart with the mean values of culture that exists now and culture that the participants prefer to exist in the future. According

Table 2 Mean, standard deviation, and Cronbach’s alpha coefficient

Variables	Mean (<i>M</i>)	Std. deviation (SD)	Cronbach’s alpha	Number of items
Transformational leadership	2.333	0.996	0.958	20
<i>Idealized influence attributes</i>	2.444	1.191	0.880	4
<i>Idealized influence behavior</i>	2.321	0.962	0.703	4
<i>Inspirational motivation</i>	2.442	1.104	0.888	4
<i>Intellectual stimulation</i>	2.349	1.102	0.866	4
<i>Individual consideration</i>	2.107	1.058	0.769	4
Transactional leadership	2.325	0.885	0.850	8
<i>Contingent reward</i>	2.352	1.026	0.827	4
<i>Management-by-exception active</i>	2.297	0.954	0.743	4
Passive leadership	1.266	0.847	0.840	8
<i>Management-by-exception passive</i>	1.465	0.871	0.614	4
<i>Laissez-faire</i>	1.066	0.994	0.860	4
Extra effort	2.411	1.319	0.944	3
Effectiveness	2.521	1.190	0.927	4
Satisfaction leadership	2.420	1.255	0.897	2
Group dynamics	3.010	0.465	0.895	20
<i>Cohesiveness</i>	2.976	0.560	0.874	10
<i>Altruism</i>	2.933	0.524	0.700	5
<i>Universality</i>	3.156	0.590	0.787	5
Clan culture (now)	31.352	13.248	0.714	6
Clan culture (preferred)	35.163	10.808	0.862	6
Adhocracy culture (now)	22.049	3.737	0.700	6
Adhocracy culture (preferred)	19.471	5.962	0.777	6
Market culture (now)	21.124	5.217	0.659	6
Market culture (preferred)	19.658	5.438	0.701	6
Hierarchy culture (now)	28.492	7.755	0.615	6
Hierarchy culture (preferred)	25.705	4.316	0.612	6



Graph 1 Radar chart—existing culture and preferred future culture

to Graph 1, the organizational culture that dominates in the hotel companies is clan culture ($M = 31.352$).... On the contrary, the organizational culture that scored the less is market culture. Similarly, the sample follows the same attitude regarding its future preferences. The participants suggest that in the future the organizational culture that should dominate is clan culture ($M = 35.163$), whereas the cultures that should less dominate are market culture ($M = 19.658$) and adhocracy culture ($M = 19.471$).

Regarding the internal consistency of all scales and subscales of the questionnaire, Cronbach's alpha coefficient revealed that all scales and subscales are accepted since Cronbach's alpha values ranged from 0.612 to 0.958. The highest value of Cronbach's alpha describes the transformational leadership variable ($\alpha = 0.996$), whereas the hierarchy culture preferred, hierarchy culture now, market culture now, and management—by—exception passive score the lowest acceptable values ($\alpha = 0.612$, $\alpha = 0.615$, $\alpha = 0.659$, and $\alpha = 0.614$, respectively). Cronbach's alpha coefficient of all the other scales and subscales could be characterized as satisfactory since it ranges from 0.700 to 0.958.

Additionally, Table 3 describes the correlations between the variables of the research. It should be noted that at first the researchers examined the linearity of the factors via the linearity test of SPSS. They discovered that the following combinations of variables have linearity relationship between them: (a) transformational leadership and transactional leadership, (b) transformational leadership and group dynamics, (c) transactional leadership and group dynamics, (d) clan culture (now) with all the other cultures, (e) clan culture (preferred) with all the other cultures, (f) adhocracy culture (now) and hierarchy culture (now), (g) adhocracy culture (now)

and hierarchy culture (preferred), (h) adhocracy culture (preferred) with all the other cultures, (i) market culture (now) with all the other cultures apart from hierarchy culture (preferred), (j) market culture (preferred) with all the other cultures, (k) hierarchy culture (now) with all the other cultures, (l) hierarchy culture (preferred) with all the other cultures. All these relationships were investigated with Pearson coefficient due to the presence of linearity between them. On the contrary, all the other relationships between the factors were examined with the use of Spearman coefficient due to lack of linearity between the variables.

According to Table 3, transformational leadership has strong positive correlation with transactional leadership ($r = 0.890, p < 0.001$), whereas transformational leadership has low significant negative correlation with passive leadership ($\rho = -0.203, p < 0.001$). In addition, transformational leadership has positive significant moderate correlation with group dynamics ($r = 0.411, p < 0.001$). Regarding the variable of organizational culture, transformational leadership has significant relationship with only two organizational cultures: (a) negative and low correlation with adhocracy culture (now) ($\rho = -0.116, p < 0.001$), and (b) positive and low correlation with hierarchy culture (preferred). Similarly, transactional leadership has significant positive moderate correlation with group dynamics ($r = 0.399, p < 0.001$) and significant low positive correlation with only one culture—hierarchy culture (preferred) ($\rho = 0.142, p < 0.001$). Regarding passive leadership, the analysis revealed that passive leadership significantly correlates with only one variable which is adhocracy culture (now) ($\rho = 0.106, p < 0.001$).

As far as the several culture variables are concerned, the SPSS correlation analysis revealed the following results:

- Clan culture (now) is positively and highly connected with clan culture (preferred) ($r = 0.798, p < 0.001$), negatively and highly connected with adhocracy culture (now), market culture (now), hierarchy culture (now) ($r = -0.726, p < 0.001, r = -0.819, p < 0.001, r = -0.743, p < 0.001$ respectively), negatively and moderate related to market culture (preferred) ($r = -0.597, p < 0.001$), and finally negatively and low correlated with hierarchy culture (preferred) ($r = -0.244, p < 0.001$).
- Clan culture (preferred) is negatively and highly connected with adhocracy culture (preferred), market culture (now), market culture (preferred), hierarchy culture (now) ($r = -0.730, p < 0.001, r = -0.633, p < 0.001, r = -0.827, p < 0.001, r = -0.609, p < 0.001$ respectively), and negatively and moderate related to hierarchy culture (preferred) ($r = -0.454, p < 0.001$).
- Adhocracy culture (now) is negatively and moderate connected with hierarchy culture (now) ($r = -0.575, p < 0.001$), and negatively and low related to adhocracy culture (preferred), market culture (now), market culture (preferred) and hierarchy culture (preferred) ($\rho = -0.133, p < 0.001, \rho = -0.143, p < 0.001, \rho = -0.119, p < 0.05, r = -0.127, p < 0.001$, respectively).
- Adhocracy culture (preferred) is positively and moderate connected with market culture (now), market culture (preferred) and hierarchy culture (now) ($r = 0.572, p < 0.001, r = 0.431, p < 0.001, r = 0.458, p < 0.05$ respectively).

Table 3 Correlations of variables (pearson or spearman coefficient)

Variables	1	2	3	4	5	6	7	8	9	10	11	12
1. Transformational leadership	1	0.890**(p)	-0.203** (s)	0.028 (s)	-0.036 (s)	-0.116* (s)	-0.006 (s)	-0.070 (s)	0.008 (s)	0.051 (s)	0.103* (s)	0.411***(p)
2. Transactional leadership		1	-0.075 (s)	0.039 (s)	-0.007 (s)	-0.092 (s)	-0.069 (s)	-0.082 (s)	-0.015 (s)	0.027 (s)	0.142** (s)	0.399***(p)
3. Passive leadership			1	0.076 (s)	0.099 (s)	0.106* (s)	-0.084 (s)	-0.062 (s)	-0.091 (s)	-0.094 (s)	0.057 (s)	0.021 (s)
4. Clan now culture				1	0.798** (p)	0.080 (p)	-0.726** (p)	-0.819** (p)	-0.597** (p)	-0.743** (p)	-0.244** (p)	-0.031 (s)
5. Clan preferred culture					1	0.098 (p)	-0.730** (p)	-0.633** (p)	-0.827** (p)	-0.609** (p)	-0.454** (p)	-0.033 (s)
6. Adhocracy now culture						1	-0.133* (s)	-0.143** (s)	-0.119* (s)	-0.575** (p)	-0.127* (p)	-0.066 (s)
7. Adhocracy preferred culture							1	0.572** (p)	0.431** (p)	0.458** (p)	-0.097 (p)	-0.007 (s)
8. Market now culture								1	0.575** (p)	0.405** (p)	0.062 (s)	-0.035 (s)
9. Market preferred culture									1	0.409** (p)	0.215** (p)	0.033 (s)
10. Hierarchy now culture										1	0.377** (p)	0.107* (s)
11. Hierarchy preferred culture											1	0.087 (s)
12. Group dynamics												1

Note N = 366; * $p < 0.05$; ** $p < 0.01$, (p) = Pearson coefficient, (s) = Spearman coefficient

- Market culture (now) is positively and moderate connected with market culture (preferred), hierarchy culture (now) ($r = 0.575, p < 0.001, r = 0.405, p < 0.001$, respectively).
- Market culture (preferred) is positively and moderately connected with hierarchy culture (now) ($r = 0.409, p < 0.001$) and positively and low correlated with hierarchy culture (preferred) ($r = 0.215, p < 0.001$).
- Hierarchy culture (now) is positively and moderately connected with hierarchy culture (preferred) ($r = 0.377, p < 0.001$) and positively and low correlated with group dynamics ($r = 0.107, p < 0.05$).

4.2 Measurement Model and Common Method Bias

Factor analysis was executed so as to examine the variability among the observed correlated variables (transformational leadership and its dimensions, transactional leadership and its dimensions, passive leadership and its dimensions, outcome of leadership and its dimensions, and group dynamics and its dimensions). First, the researchers investigated the dimensions of transformational leadership. The results of the factor analysis are the following:

- *Idealized Influence Attributes*: The model has a good fit since all 4 questions (items) explain the 73.94% of the total variance ($KMO = 0.804, x^2 = 943.871, p < 0.000, df = 6$). All factor loadings range from 0.697 to 0.928. So all items are accepted.
- *Idealized Influence Behavior*: The model has a good fit since all 4 questions (items) explain the 58.46% of the total variance ($KMO = 0.701, x^2 = 523.907, p < 0.000, df = 6$). All factor loadings range from 0.500 to 0.911. So all items are accepted.
- *Inspirational Motivation*: The model has a good fit since all 4 questions (items) explain the 75.13% of the total variance ($KMO = 0.835, x^2 = 823.901, p < 0.000, df = 6$). All factor loadings range from 0.834 to 0.889. So all items are accepted.
- *Intellectual Stimulation*: The model has a good fit since all 4 questions (items) explain the 71.40% of the total variance ($KMO = 0.754, x^2 = 754.885, p < 0.000, df = 6$). All factor loadings range from 0.809 to 0.891. So all items are accepted.
- *Individual Consideration*: The model has a good fit since all 4 questions (items) explain the 59.27% of the total variance ($KMO = 0.688, x^2 = 441.333, p < 0.000, df = 6$). All factor loadings range from 0.685 to 0.845. So all items are accepted.

Secondly, the dimensions of transactional leadership and passive leadership were examined as follows:

- *Contingent reward*: The model has a good fit since all 4 questions (items) explain the 66.16% of the total variance ($KMO = 0.787, x^2 = 551.882, p < 0.000, df = 6$). All factor loadings range from 0.738 to 0.867. So all items are accepted.
- *Management-by-exception active*: The model has a good fit since all 4 questions (items) explain the 56.95% of the total variance ($KMO = 0.722, x^2 = 349.364, p < 0.000, df = 6$). All factor loadings range from 0.665 to 0.838. So all items are accepted.
- *Management-by-exception passive*: The model has a good fit since all 4 questions (items) explain the 46.88% of the total variance ($KMO = 0.692, x^2 = 159.990, p < 0.000, df = 6$). All factor loadings range from 0.525 to 0.750. So all items are accepted.
- *Laissez-faire*: The model has a good fit since all 4 questions (items) explain the 70.59% of the total variance ($KMO = 0.811, x^2 = 670.013, p < 0.000, df = 6$). All factor loadings range from 0.817 to 0.889. So all items are accepted.

Third, the dimensions of the outcome of leadership were examined as follows:

- *Extra effort*: The model has a good fit since all 3 questions (items) explain the 89.91% of the total variance ($KMO = 0.746, x^2 = 1079.700, p < 0.000, df = 3$). All factor loadings range from 0.925 to 0.965. So all items are accepted.
- *Effectiveness*: The model has a good fit since all 4 questions (items) explain the 82.18% of the total variance ($KMO = 0.841, x^2 = 1168.820, p < 0.000, df = 6$). All factor loadings range from 0.887 to 0.926. So all items are accepted.
- *Satisfaction with leadership*: The model has a good fit since all 2 questions (items) explain the 90.69% of the total variance ($KMO = 0.500, x^2 = 394.693, p < 0.000, df = 1$). All factor loadings have value 0.952. So all items are accepted.

Consequently, the authors investigated the dimensions of the variable group dynamics. The results of their examination are given below:

- *Altruism*: The model has a good fit since all 5 questions (items) explain the 45.83% of the total variance ($KMO = 0.643, x^2 = 359.382, p < 0.000, df = 10$). All factor loadings range from 0.558 to 0.755. So all items are accepted.
- *Cohesiveness*: The model has a good fit since all 10 questions (items) explain the 64.14% of the total variance ($KMO = 0.863, x^2 = 1835.470, p < 0.000, df = 45$). All factor loadings range from 0.503 to 0.835. So all items are accepted.
- *Universality*: The model has a good fit since all 5 questions (items) explain the 54.85% of the total variance ($KMO = 0.748, x^2 = 573.481, p < 0.000, df = 10$). All factor loadings range from 0.707 to 0.817. So all items are accepted.

Thus, all items are accepted and as it is mentioned in the previous paragraph, Cronbach's alpha coefficient is described on Table 2. The results of Cronbach's alpha coefficient are in agreement with the results of factor analysis.

4.3 Hypotheses Testing

The first hypothesis H1 (“*Transformational leadership has significant positive relationship with group dynamics*”) has been examined with the use of multiple regression model. More specifically, Pearson coefficient revealed that transformational leadership has significant moderate positive linear correlation with group dynamics ($r = 0.411, p < 0.001$). For this reason, researchers applied a multiple regression model in order to examine which of the dimensions of transformational leadership have effect on group dynamics. The results of multiple regression model showed that the dimensions of transformational leadership can predict the 19.6% of the variable of group dynamics ($R^2 = 0.196, p < 0.001$). More specifically, group dynamics is influenced the most by the dimensions of idealized influence behavior ($p = 0.005$) and inspirational motivation ($p = 0.009$). According to Table 4, one unit of idealized influence behavior can increase group dynamics variable by 0.124 units, while one unit of inspirational motivation can increase group dynamics variable by 0.117 units. Thus, H1 hypothesis is accepted.

In addition, the second hypothesis H2 (“*Transactional leadership has significant positive relationship with group dynamics*”) has been examined with the use of multiple regression model. More thoroughly, Pearson coefficient revealed that transactional leadership has significant moderate positive linear correlation with group dynamics ($r = 0.399, p < 0.001$). As a result, researchers implemented a multiple regression model in order to examine which of the dimensions of transactional leadership have effect on group dynamics. The results of multiple regression model

Table 4 Multiple regression model for transformational leadership and group dynamics

Model	R	R-Square	Adjusted R-square	Sig
<i>Transformational leadership</i>	0.443	0.196	0.185	< 0.001
	Unstandardized coefficients		Standardized coefficients	
Model	B	SE	Beta	Sig
<i>Transformational leadership</i>				
(Constant)	2.517	0.058		0.000
Idealized influence attributes	-0.050	0.041	-0.127	0.232
Idealized influence behaviors	0.124	0.045	0.258	0.005
Inspirational motivation	0.117	0.045	0.277	0.009
Intellectual stimulation	0.001	0.045	0.002	0.988
Individual consideration	0.019	0.039	0.042	0.639
Dependent variable: group dynamics				

showed that the dimensions of transformational leadership can predict the 15.9% of the variable of group dynamics ($R^2 = 0.159, p < 0.001$). More specifically, group dynamics are influenced by the dimensions of contingent reward ($p = 0.000$) and management-by-exception active ($p = 0.002$). According to Table 5, one unit of contingent reward can increase group dynamics variable by 0.116 units, while one unit of management-by-exception active can increase group dynamics variable by 0.093 units. Thus, H2 hypothesis is accepted.

The third hypothesis H3 (“*Passive leadership has significant negative relationship with group dynamics*”) is not accepted due to the fact that Spearman coefficient did not show any significant correlation between passive leadership and group dynamics ($\rho = 0.021, p > 0.05$).

Moreover, the fourth hypothesis H4 (“*Organizational culture has significant positive relationship with group dynamics*”) is only partially accepted. The results of the correlation analysis (Pearson and Spearman coefficients) showed that only hierarchy culture (now) has significant low correlation with group dynamics ($\rho = 0.107, p < 0.05$). All the other cultures (existing or preferred) have no significant correlation with group dynamics. Hence, hypothesis H4 is only accepted for hierarchy culture (now).

According to the correlations on Table 3 there is no significant relationship between transformational leadership and types of organizational culture. Even though, it seems that transformational leadership has low significant correlation with two types of culture (adhocracy (now) and hierarchy (preferred)) there is no linear connection between them. So, any linear regression model cannot be applied so as to examine the mediation role of organization culture on the linkage between transformational leadership and group dynamics. In other words, there is no point to investigate the mediation role of culture. As a result, hypothesis H5 (“*Organizational culture mediates the relationship between transformational leadership and group dynamics*”) is not accepted.

Table 5 Multiple regression model for transactional leadership and group dynamics

Model	R	R-Square	Adjusted R-square	Sig
Transactional leadership	0.399	0.159	0.155	< 0.001
	Unstandardized coefficients		Standardized coefficients	
Model	B	SE	Beta	Sig
Transactional leadership				
(Constant)	2.525	0.063		0.000
Contingent reward	0.116	0.027	0.255	0.000
Management-by-exception active	0.093	0.029	0.190	0.002
Dependent variable: group dynamics				

Similarly, there is no significant relationship between transactional leadership and types of organizational culture (Table 3). Although, transactional leadership has low positive significant relationship with hierarchy culture (preferred), there is no linear connection between them. Hence, there is no point to examine the mediation role of culture. Hence, hypothesis H6 (“*Organizational culture mediates the relationship between transactional leadership and group dynamics*”) is not accepted.

Regarding hypothesis H7 (“*Organizational culture mediates the relationship between passive leadership and group dynamics*”), there is no significant linear relationship between the independent variable (passive leadership) and the dependent variable (group dynamics). Thus, there is no point on examining the mediation role of organizational culture on the relationship between passive leadership and group dynamics. Hence, H6 hypothesis is rejected.

Hypothesis H8 refers to the moderating role of organizational culture on the linkage between transformational leadership and group dynamics. In order to examine this hypothesis, there should be no causal relationship between transformational leadership and organizational culture. Table 3 shows that transformational leadership has no significant relationship with clan (now), clan (preferred), adhocracy (preferred), market (now), market (preferred), and hierarchy (now). Thus, the moderating role of these cultures should be examined. The results of the moderating role of each culture are presented in Table 6.

Organizational culture plays moderating role on the linkage between transformational leadership and group dynamics when the significance (.sig) of interaction term (which represents the culture) values less than 0.05 ($p < 0.05$). According to Table 6 only in the market (now) culture the interaction term values less than 0.05 ($p = 0.001 < 0.05$). So, market (now) culture moderates the relationship between transformational leadership and group dynamics. Hence, hypothesis H8 (“*Organizational culture moderates the relationship between transformational leadership and group dynamics*”) is accepted only for the existing market culture.

Similarly, hypothesis H9 refers to the moderating role of organizational culture on the linkage between transactional leadership and group dynamics. In order to examine this hypothesis, there should be no causal relationship between transactional leadership and organizational culture. Table 3 shows that transactional leadership has no significant relationship with clan (now), clan (preferred), adhocracy (now), adhocracy (preferred), market (now), market (preferred), and hierarchy (now). Thus, the moderating role of these cultures should be examined. The results of the moderating role of each culture are presented in Table 7.

Organizational culture plays moderating role on the linkage between transactional leadership and group dynamics when the significance (.sig) of interaction term (which represents the culture) values less than 0.05 ($p < 0.05$). According to Table 7 only in the market (now) culture and in the adhocracy (now) culture the interaction terms value less than 0.05 ($p = 0.021$ and $p = 0.000$, respectively). So, market (now) culture and adhocracy (now) culture moderate the relationship between transactional leadership and group dynamics. Hence, hypothesis H9

Table 6 Multiple regression models for the investigation of the moderating role of organizational culture on linkage between transformational leadership and group dynamics

Model 1	<i>R</i>	<i>R</i> -Square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of clan (now)</i>	0.420	0.177	0.172	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 1	B	SE	Beta	Sig
(Constant)	2.565	0.056		0.000
INT clan (now)	0.040	0.021	0.090	0.059
Transformational	0.190	0.022	0.490	0.000
Model 2	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of clan (preferred)</i>	0.411	0.169	0.164	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 2	B	SE	Beta	Sig
(Constant)	2.563	0.057		0.000
INT clan (preferred)	-0.008	0.021	-0.017	0.719
Transformational	0.192	0.022	0.411	0.000
Model 3	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of adhocracy (preferred)</i>	0.417	0.174	0.169	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 3	B	SE	Beta	Sig
(Constant)	2.579	0.057		0.000
INT adhocracy (preferred)	-0.033	0.022	-0.075	0.125
Transformational	0.185	0.023	0.396	0.000
Model 4	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of market (now)</i>	0.438	0.191	0.187	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 4	B	SE	Beta	Sig
(Constant)	2.564	0.056		0.000
INT market (now)	-0.069	0.022	-0.151	0.001
Transformational	0.189	0.022	0.406	0.000

(continued)

Table 6 (continued)

Model 1	<i>R</i>	<i>R</i> -Square	Adjusted <i>R</i> -square	Sig
Model 5	<i>R</i>	<i>R</i>-square	Adjusted <i>R</i>-square	Sig
<i>Moderating role of market (preferred)</i>	0.415	0.172	0.167	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 5	B	SE	Beta	Sig
(Constant)	2.564	0.057		0.000
INT market (preferred)	0.025	0.021	0.058	0.226
Transformational	0.191	0.022	0.410	0.000
Model 6	<i>R</i>	<i>R</i>-square	Adjusted <i>R</i>-square	Sig
<i>Moderating role of hierarchy (now)</i>	0.413	0.171	0.166	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 6	B	SE	Beta	Sig
(Constant)	2.566	0.57		
INT hierarchy (now)	0.020	0.021	0.045	0.343
Transformational	0.190	0.022	0.408	0.000
Dependent: group dynamics				

(“Organizational culture moderates the relationship between transactional leadership and group dynamics”) is accepted only for the existing market culture and for the existing adhocracy culture.

Finally, hypothesis H10 (“Organizational culture moderates the relationship between passive leadership and group dynamics”) is not accepted since there is no significant correlation between passive leadership and group dynamics as it is indicated in Table 3.

5 Conclusions/Discussion

The aim of the current research was to investigate the relationship between leadership styles, organizational culture and group dynamics regarding employees who work on four and five-star hotels.

According to the participants of the research, two leadership styles prevail in the hotel companies: the transformational leadership style and the transactional leadership style. Moreover, the organizational culture that exists most in the hotel businesses

Table 7 Multiple regression models for the investigation of the moderating role of organizational culture on linkage between transactional leadership and group dynamics

Model 1	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of clan (now)</i>	0.405	0.164	0.159	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 1	B	SE	Beta	Sig
(Constant)	2.527	0.063		0.000
INT clan (now)	0.032	0.022	0.070	0.147
Transactional	0.207	0.025	0.394	0.000
Model 2	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of clan (preferred)</i>	0.400	0.160	0.155	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 2	B	SE	Beta	Sig
(Constant)	2.520	0.063		0.000
INT clan (preferred)	-0.015	0.022	-0.033	0.493
Transactional	0.211	0.025	0.402	0.000
Model 3	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of adhocracy (now)</i>	0.456	0.208	0.203	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 3	B	SE	Beta	Sig
(Constant)	2.513	0.061		0.000
INT adhocracy (now)	-0.102	0.022	-0.221	0.000
Transactional	0.210	0.025	0.400	0.000
Model 4	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
<i>Moderating role of adhocracy (preferred)</i>	0.402	0.162	0.157	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 4	B	SE	Beta	Sig
(Constant)	2.537	0.064		0.000
INT adhocracy (preferred)	-0.025	0.023	-0.054	0.274
Transactional	0.203	0.026	0.386	0.000

(continued)

Table 7 (continued)

Model 1	<i>R</i>	<i>R</i> -square	Adjusted <i>R</i> -square	Sig
Model 5	<i>R</i>	<i>R</i>-square	Adjusted <i>R</i>-square	Sig
<i>Moderating role of market (now)</i>	0.414	0.171	0.167	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 5	B	SE	Beta	Sig
(Constant)	2.524	0.062		0.000
INT market (now)	-0.050	0.022	-0.111	0.021
Transactional	0.207	0.025	0.394	0.000
Model 6	<i>R</i>	<i>R</i>-Square	Adjusted <i>R</i>-square	Sig
<i>Moderating role of market (preferred)</i>	0.407	0.166	0.161	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 6	B	SE	Beta	Sig
(Constant)	2.519	0.063		0.000
INT market (preferred)	0.035	0.021	0.082	0.090
Transactional	0.212	0.025	0.403	0.000
Model 7	<i>R</i>	<i>R</i>-square	Adjusted <i>R</i>-square	Sig
<i>Moderating role of hierarchy (now)</i>	0.409	0.168	0.163	0.000
	Unstandardized coefficients		Standardized coefficients	
Model 7	B	SE	Beta	Sig
(Constant)	2.519	0.063		0.000
INT hierarchy (now)	0.046	0.024	0.093	0.053
Transactional	0.211	0.025	0.402	0.000
Dependent: group dynamics				

is clan culture. This is the culture that the employees hope that would dominate also in the future.

As far as transformational leadership is concerned, the results showed that there is a significant moderate positive relationship with group dynamics, especially regarding the dimensions of idealized influence behavior and inspirational motivation.

On the same point of view, transactional leadership has significant moderate positive relationship with group dynamics. Especially, both contingent reward

and management-by-exception active have a significant positive impact on group dynamics. On the contrary, there seems to be no significant relationship between passive leadership and group dynamics.

Eventually, regarding the mediating role of organizational culture, the results showed that culture does not mediate the relationship between leadership styles and group dynamics as there is no significant connection between leadership styles and organizational culture. Last but not the least, the research's findings indicated that only the existing market culture moderates the relationship between transformational leadership and group dynamics; also, the existing adhocracy and market cultures moderate the linkage between transactional leadership and group dynamics.

As it is previously mentioned, the concept of group dynamics in the hotel industry needs further research as there is very limited research bibliography regarding the organizational factors that influence group dynamics. This research aims to trigger academics and practitioners for further research.

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Unlocking the Potential: A Journey Towards the Empowerment of Women in the South African Tourism Sector



Nasreen Tisaker and Magdalena Petronella Swart

Abstract According to the World Travel and Tourism Council (WTTC), female employment reduces poverty, sustains economic growth, and supports women's empowerment and independence. This research aims to investigate the effect of Entrepreneurial skill, Competence, and Autonomy on the Empowerment of Women in the South African tourism sector. The study was quantitative and descriptive with a constructivist research approach. Primary data for this study was collected from women working in destination marketing organisations (DMOs), hospitality, business tourism, travel agencies, and tour operators across the country. The study findings indicate that women in tourism perceive themselves as having the entrepreneurial skills, competency, innovative ideas, independence, and autonomy necessary to succeed in the tourism industry, highlighting the relevance of these factors to Women in Tourism (WiT) in South Africa. This study makes a valuable contribution to understanding the potential of the Empowerment of women in the South African tourism sector. The findings of this study will assist tourism authorities and policymakers to better plan for the equal opportunity and inclusion of women in tourism across the provinces of South Africa.

Keywords Empowerment · Entrepreneurial skill · Competence · Autonomy · Women in tourism

JEL Classification Z32 Tourism and Development

1 Introduction

According to the World Travel and Tourism Council (WTTC), female employment in the tourism sector is important for poverty reduction, economic growth, and women's empowerment (WTTC, 2019). The World Bank recognises the tourism sector offers

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341

significant opportunities for women's empowerment, particularly in leadership and entrepreneurship roles (Twining-Ward & Zhou, 2017). The United Nations World Tourism Organization (UNWTO) also emphasises the importance of gender equality and women's empowerment for sustainable tourism development, as highlighted during World Tourism Day 2019 (Boley et al., 2017; UNWTO, 2019). Women tend to be overrepresented in low-income and insecure jobs across sectors, but earning a wage is considered a pathway to empowerment and a means to address gender inequality (Guvuroiro & Booyens, 2019). South Africa is a growing tourism hub for both leisure and commercial tourism (Booyens & Rogerson, 2017). The tourism sector holds significant importance for the South African (SA) economy, as emphasised in the National Tourism Sector Strategy (NTSS) and the Tourism Human Resource and Skills Development Strategy (THRDS) (Department of Tourism, 2017). The SA government recognises the potential of the tourism sector to contribute to inclusive growth, as indicated in the economic policy proposed by the National Treasury (2019). This policy dedicated a section specifically to tourism, highlighting its capacity to stimulate the SA economy and providing recommendations for enhancing inclusivity and transformative aspects within the sector.

In terms of employment, SA ranks as the second-largest employer of women in the tourism industry globally, trailing only behind Russia (WTTC, 2019). This underscores women's significant role in the SA tourism sector and the potential for further empowerment and advancement of women within the industry. In the SA industry, there is little study on the role of women's empowerment (Booyens & Rogerson, 2017). It is vital to highlight that, as stated by African Vision 2063, the empowerment of women would surely aid in the fulfilment of the aforementioned goals. (UNWTO, 2019). The empowerment of women in the tourism sector has received limited research attention, particularly in the context of SA. This study aims to examine how entrepreneurial skill, competence, and autonomy impact the Empowerment of WiT in SA. Therefore, this study seeks to fill this gap and contribute to the discourse on women in tourism (WiT). This paper commences with an overview of the literature, followed by a discussion of the research method, and finally a discussion of the findings. The conclusion follows the research's implication.

2 Literature Review

Empowerment of Women in Tourism

Women's empowerment serves to address gender disparities, such as wage inequalities and limited access to resources and business growth opportunities (Twining-Ward & Zhou, 2017; Vujko et al., 2019). The empowerment of women has numerous positive effects, including economic freedom, skill development, improved social well-being, and the ability to educate future generations (Twining-Ward & Zhou, 2017). However, the relationship between women's empowerment, poverty reduction, and tourism in Southern Africa requires further research (Moswete & Lacy,

2015). Empowerment can be viewed from multiple perspectives, including psychological, social, political, environmental, and economic aspects (Boley et al., 2017). This study viewed empowerment from a gender perspective. In the context of this study, women's empowerment in tourism refers to the freedom to think and make personal and financial decisions, as well as access to opportunities for participation in the economy (Kazi, 2021).

Empowerment allows individuals to be free, independent, and financially self-reliant (Singh, 2018; Winters et al., 2018). It involves instilling self-efficacy, a sense of control, and high confidence (Ahn & Bessiere, 2022). Education plays a significant role in women's empowerment, boosting their confidence, self-worth, and autonomy (Batool et al., 2017). Empowered women have greater decision-making autonomy, including in household matters and healthcare choices (Fielding & Lepine, 2017), which are suppressed in conservative communities (Kimbu et al., 2021). Achieving gender equity is essential for women's empowerment and advancement in society (Singh, 2018). Numerous empirical studies in tourism have identified education as a factor that promotes women's empowerment, entrepreneurship, and autonomy (Batool et al., 2017; Gámez Gutiérrez & Garzón Baquero, 2017; O'Neil & Domingo, 2016). Education and employment can increase a woman's status and power within her household and community (O'Neil & Domingo, 2016). Women's empowerment is seen as a process rather than a single outcome (Moswete & Lacy, 2015) and can manifest in various forms, including entrepreneurship and initiatives within organisations and governments to increase women's employment (Moswete & Lacy, 2015), especially in the tourism industry.

The empowerment of WiT in SA remains understudied, necessitating research to fill this literature gap. Research on the empowerment of WiT exists in the context of countries such as China, India, Ghana, and Nigeria. The inclusion of the three dimensions of entrepreneurship, competence, and autonomy has been extensively explored in relation to research on empowerment and tourism. These dimensions were chosen as they were supported by relevant empirical evidence. The selected dimensions of entrepreneurship, competence, and autonomy in this study align with the relevant empirical literature on empowerment and tourism (Batool et al., 2017; Fielding & Lepine, 2017).

Entrepreneurship, competence, and autonomy are discussed as dimensions of empowerment of WiT.

Entrepreneurship

Entrepreneurship is a powerful tool for empowering women by providing them with independence and economic opportunities (Raghunandan, 2018), especially in the tourism industry. It involves identifying promising opportunities and taking risks to start or develop a business (Hébert & Link, 1989; Szaban & Skrzek-Lubasiska, 2018). Entrepreneurship education and individual aptitudes are instrumental in encouraging innovative behaviour and empowering women (Eskiler et al., 2016). Women's entrepreneurship in the context of this study is associated with their self-empowerment and their ability to seize tourism economic opportunities for personal and community betterment.

Women face specific obstacles in entrepreneurship, such as a lack of financial investment, legal limits, socio-cultural constraints, and limited access to training and education (Jena, 2018; Master Card, 2018). Governments should create supportive environments, including training initiatives, to foster an entrepreneurial culture for women and facilitate their entry into markets and access to finance (Jena, 2018; Raghunandan, 2018). Research gaps exist in the examination of the motivation of women who pursue leadership roles and the role entrepreneurship, competence, and autonomy have on the empowerment of women in the SA tourism sector. This study aims to fill the gap in the literature by examining entrepreneurship as a dimension of the Empowerment of WiT in South Africa (SA).

Competence

Competence refers to an individual's knowledge, skills, and abilities to effectively perform tasks in a specific field (Alam, 2016; Buller, 2017). Competence is closely linked to empowerment and motivation, as individuals who are motivated and empowered are more likely to enhance their competence through upskilling and taking responsibility for their development (Buller, 2017). Confidence is strongly associated with competence, as individuals who display confidence are often perceived as more competent (Nasher, 2019). In the context of women in tourism, competence relates to their capability to carry out assigned tasks with confidence (Ahn & Bessiere, 2022).

Many women may doubt their competence and have a greater fear of failure, emphasising the need for entrepreneurial training programmes to enhance their competence and confidence (Jena, 2018). The current study aims to address the literature gap by examining competence as a dimension of women's empowerment in the tourism sector in SA.

Autonomy

Job autonomy refers to the extent to which employees have control over their work, including when, where, and how tasks are completed (Jaiswal & Dhar, 2017; Maylett, 2016; Xu et al., 2018). Women who are economically active and have control over their own savings and income experience greater autonomy and economic authority (Batool et al., 2017; Boley et al., 2017; Moswete & Lacy, 2015). Urban women tend to enjoy more autonomy in household activities and employment compared to rural women (Vaz et al., 2016). Empowerment and autonomy are closely related, as empowerment leads to personal freedoms and the ability for women to fully participate in their communities (Winters et al., 2018). In the context of women in tourism, autonomy refers to the freedom and flexibility to make career advancement choices without gender-related barriers (Vaz et al., 2016).

Women's status encompasses various aspects, including autonomy, power, empowerment, and societal valuation (Duffy et al., 2015). Limited quantitative research has been conducted on the effects of women's empowerment and autonomy, emphasising the need for further investigation, particularly in the context of education and entrepreneurship (Batool et al., 2017; Boley et al., 2017; Vaz et al., 2016).

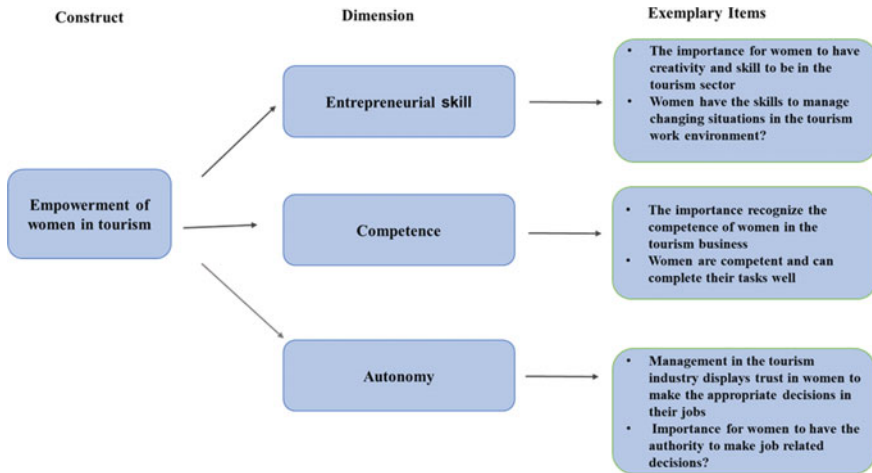


Fig. 1 Proposed dimensions of the empowerment of women in tourism construct. *Source* Authors' own compilation

This study aims to fill these gaps by examining the roles of entrepreneurship, competence, and autonomy in the empowerment of women in the SA tourism sector, as proposed in Fig. 1.

Figure 1 proposed dimensions for *the empowerment* of *WiT* construct

Based on the above discussion, there is sufficient theoretical evidence to formulate the hypothesis below:

H₁: Entrepreneurship, competence, and autonomy are dimensions of empowerment of women in the South African tourism sector and can be reliably and validly measured.

3 Methodology

Research Approach

The researcher employed a constructivist research approach, which aligns with the research epistemology (Rahi et al., 2019). Constructivist research aims to gain a comprehensive understanding of a subject and its surrounding environment (Rahi et al., 2019). By providing a comprehensive knowledge of subjective, cultural, and dynamic components of tourism, the constructivist theory approach advances tourism research and allows investigation of its intricacies and interactions in broader social and cultural settings.

Research Design and Method

The primary data source for this study conducted in 2021 consisted of women employed in entry-level to upper management positions in the South African hospitality, business tourism, travel agency, and tour operator sectors. The study employed an exponential non-discriminative snowball sampling technique. To meet the requirements of the study, a minimum of 245 respondents was needed, and a total of 250 individuals participated. The researchers followed the guidelines established by Hair et al. (2021), aiming to gather 5–10 responses for each item on the questionnaire to ensure result validity. The measurement instrument utilised in this survey-based research was an online survey available at <https://survey.unisa.ac.za/index.php/389115?l>. The motive for this research methodology was due to the UNISA covid-19 regulations, which limited face-to-face contact as a means to collect primary data. The necessary permissions and ethical clearances were obtained from the institution (UNISA) (Ref# 2020_CEMS_DAM_016).

The assessment of empowerment of WiT in the SA tourism sector involved the use of a questionnaire, which consists of 14 components. These components were selected to evaluate the extent of women's empowerment in the industry as informed by Boley et al. (2017), Datta (2018), Moswete and Lacy (2015) and Winters et al. (2018). A questionnaire was specifically designed for this study to explore the empowerment of WiT in SA. A 7-point Likert intensity scale was used to provide participants with a wider range of response options. It is worth noting that the Likert scale, as proposed by Cohen et al. (1988) and Yaddanapudi and Yaddanapudi (2019), offers a limited range of responses and is widely employed in research. The responses on the Likert scale in this study ranged from “not important at all” to “very important,” “not at all” to “definitely,” and “do not agree” to “definitely agree” (Grondin & Blais, 2010). Data collection took place between 1 April 2021, and 30 September 2021. Atef and Balushi (2015) and Boley et al. (2017) studied entrepreneurship and empowerment of WiT, respectively, and both authors chose to use surveys to collect the data for their studies; however, they chose to administer the survey face to face. The researcher created a LinkedIn page (<https://www.linkedin.com/groups/9065913>) for WIT and invited contacts to join. Once the contacts accepted the invitation, the prospective participants received a survey link (<https://survey.unisa.ac.za/index.php/389115?l>) along with a brief study overview through the LinkedIn message system. The majority of participants for the study were recruited through LinkedIn.

Reliable data on this construct were not available, as the cited studies were qualitative (Chatterjee et al., 2018; Jena, 2018; Noronha & Guimarães, 2017). To address this gap, a comprehensive literature review was conducted, identifying different dimensions of women's empowerment in the tourism sector. As a result, a measurement tool was developed. The study focused on examining the reliability and validity of this instrument. In this study, descriptive statistics were employed to examine the characteristics of the data and assess its suitability for further analysis. Additionally, multivariate analysis utilised exploratory factor analysis (EFA) to explore the relationships among variables and extract underlying factors. Subsequently, an EFA was conducted. As stated by Pallant (2020), an EFA is not intended to establish

significant differences between groups or test hypotheses. Rather, it aims to reduce and summarise a large set of variables into a more manageable number of variables, while identifying items that exhibit similar responses or tendencies (Jung, 2013; Maree, 2016). A correlation of 0 signifies no relationship, while a correlation of 1.00 represents a perfect positive correlation and -1.00 denotes a perfect negative correlation (Pallant, 2020). Pallant (2020) further suggests that correlations ranging from 0.10 to 0.29 are considered small, correlations from 0.30 to 0.49 indicate a medium correlation and correlations from 0.50 to 1.00 indicate a large correlation.

The dimensionality of the data was reduced using Principal Component Analysis (PCA) with IBM SPSS Statistics V28, to examine patterns of correlations among the questions related to perceptions of empowerment in WiT (Pallant, 2020). Bartlett's test of sphericity and the Kaiser–Meyer–Olkin (KMO) measure of sampling adequacy was used as additional statistical measures to determine the factorability of the data (Hair et al., 2021; Pallant, 2020). Furthermore, the Kolmogorov–Smirnov statistics, mean, median, standard deviation, and kurtosis were employed to assess the normality of the data distribution for each new latent variable. Thus, the current study used univariate and multivariate analysis to test H_1 .

Results

The research questionnaire's Section A sought responses from female participants employed in the tourism sector and aimed to confirm their eligibility. This section focused on gathering information about various aspects, including gender, age, province of residence, employment sector, employment level, and highest qualification. The findings presented here are based on a sample size of 250 respondents.

All 250 respondents were women, and the majority fell within the age range of 18 to 37 (50.8%). The largest proportions of respondents were located in the Western Cape (58%) and Gauteng (19.2%). Furthermore, a majority of the respondents held undergraduate qualifications (48.4%). Among the respondents, 83.2% had more than 5 years of work experience, and the majority occupied entry-level to middle-management positions (58.8%).

To determine the suitability of the data from the WiT empowerment study for further analysis, sample sizes, means, and standard deviations were examined. It was concluded that the data were suitable for further investigation.

4 Results

The questionnaire on the empowerment of women in tourism focused on exploring the concept of empowerment in the context of WiT. This included examining dimensions such as entrepreneurship, competence, and autonomy. The results indicate that the majority of the items related to WiT empowerment had a distribution that closely resembled a normal distribution, as seen from the proximity of the means, medians, and modes.

The EFA which included the Pearson Correlation Coefficients/Spearman's rho, PCA, Bartlett's test of sphericity, and the Kaiser–Meyer–Olkin (KMO) are discussed under the methodology. Table 2 depicts the Pearson Correlation Coefficients among the original 14 items (Pearson correlation/Spearman's rho).

Table 2 (See Addendum 1).

The correlation matrix reveals coefficients that are 0.3 or higher. The Kaiser–Meyer–Olkin value was 0.80, surpassing the recommended minimum value of 0.6 (Kaiser, 1970, 1974; Pallant, 2020; Tabachnick et al., 2013). Additionally, Bartlett's Test of Sphericity yielded a statistically significant result ($X^2 = 859.95$, $df = 55$; $\rho < 0.001$), confirming factorability (Bartlett, 1954; Pallant, 2020; Tabachnick et al., 2013).

The initial three components in the analysis exhibited eigenvalues greater than 1, with values of 3.62, 2.13, and 1.20. The remaining 11 items in the analysis led to a 3-factor solution that explained 63.13% of the variation in the data.

Table 1 reports the descriptive statistics, PCA, and Cronbach Coefficient Alpha.

The Kolmogorov–Smirnov and Shapiro–Wilk normality tests yielding a value of $p \leq 0.001$ indicated significant deviations from normality in the distributions of the new latent. As the sample size was bigger than 200 and the Kolmogorov–Smirnov test tends to be sensitive to larger sample sizes, the test for normality was not critical (Tabachnick et al., 2013). The descriptive statistics for the newly formed latent variable were examined. Competence had the highest mean score of 6.73, indicating its strong discriminatory value. Pearson Correlation and Spearman rho Correlation were employed to assess the relationships between the new latent variables. The analysis demonstrated a range of relationships from no effect to small, medium, and large effects, with only the correlation between Entrepreneurial Skill and Competence surpassing 0.3 (Refer to Annexure 1). An initial PCA analysis of 14 items produced a 3-factor solution that explained 56.24% of the variance in the data. Since the deletion of three of the factors enhanced the amount of variance that the solution could explain, those three variables were not included in the solution. Therefore, only 11 items were retained. Thus, the data support H_1 through the three newly formed latent variables (*Entrepreneurial Skill, Competence, and Autonomy*).

Discussion on the results

Multiple studies have acknowledged that empowerment encompasses various dimensions such as psychological, social, political, gender, environmental, and economic aspects (Boley et al., 201; Kazi, 2021; Winters et al., 2018). As stated previously, this study viewed empowerment from a gender perspective.

According to the findings of this study, women in tourism believe they have the requisite entrepreneurial skills to be innovative and successful in the tourism industry. According to Batool et al. (2017), Jena (2018), and Singh (2018), women with entrepreneurial skills confront challenges such as access to capital, access to markets, and socio-cultural barriers. Can work independently and is also applicable to WiT in SA. These findings contribute to the growing body of literature on WiT in South Africa.

Table 1 Summary of the descriptive, PCA, and Cronbach coefficient alpha for Empowerment of WiT (n = 250)

Construct	New latent variable	Items	Item descriptives				New latent variable descriptives				Factor loadings	α
			Mean	SD	Skewness	Kurtosis	Mean	SD	Skewness	Kurtosis		
Empowerment of WiT	Entrepreneurial skill	E2	6.74	0.684	-4.38	21.74	6.62	0.650	-3.17	11.30	0.80	0.77
		E3	6.49	0.954	-2.78	7.12					0.78	
		E8	6.67	0.754	-3.57	12.41					0.74	
		E9	6.59	0.924	-3.22	9.93					0.65	
		E7	6.72	0.665	-4.44	21.46	6.73	0.510	-4.19	23.34	0.79	
Competence		E14	6.80	0.555	-5.26	33.47					0.78	0.74
		E5	6.81	0.641	-5.87	23.97					0.72	
		E6	6.59	0.842	-3.38	11.69					0.66	
Autonomy		E12	4.56	1.981	0.02	-1.71	4.84	1.540	-0.02	-1.31	0.85	0.70
		E10	4.75	1.878	-0.01	-1.73					0.84	
		E11	5.24	1.704	-0.39	-1.58					0.79	

Note SD Standard deviation; α —Cronbach coefficient alpha

The current study's findings indicate that WiT believes they are competent, have unique ideas, and can operate autonomously, and this is also important to WiT in SA. These findings add to the expanding corpus of research on WiT in SA. Jena (2018) and Nasher (2019) suggested that confidence was closely related to competence and that women who questioned their ability were more likely to fail.

This study found that women in tourism believe they have the essential autonomy to make autonomous decisions and openly express their ideas at work, indicating that this component is relevant to WiT in SA. These findings are congruent with those of Batool et al. (2017), Noronha and Guimãres (2017), and Winters et al. (2018), who claim that empowered women have more autonomy in the decisions they make; these findings add to the body of knowledge concerning WiT in SA.

The data from the study supports Hypothesis 1 (H_1), as the newly established latent variables of Entrepreneurial Skill, Competence, and Autonomy are reliable and valid indicators of *Empowerment of WiT*.

5 Conclusion

The study successfully identified Entrepreneurship, Competence, and Autonomy as dimensions of *Empowerment of WiT* in the SA tourism sector, establishing it as a valid theoretical construct. The statistical analysis of the 250 completed questionnaires was conducted using IBM SPSS V28 software. Univariate analysis was used to analyse the descriptive statistics of the constructs related to *Empowerment of WiT*. These descriptive statistics justified the subsequent bivariate and multivariate analyses. Pearson Correlation and Spearman rho Coefficient were employed to examine the strength of the relationships between the items within each construct, supporting H_1 . The findings indicate that many women in the tourism industry have a higher level of education, aligning with the idea that education promotes women's empowerment, entrepreneurship, and autonomy, as supported by previous studies (Batool et al., 2017; Gámez Gutiérrez & Garzón Baquero, 2017; O'Neil & Domingo, 2016).

The present study's findings are consistent with previous research (Batool et al., 2017; Jena, 2018; Raghunandan, 2018; Vaz et al., 2016; Vujko et al., 2019; Winters et al., 2018). Jena (2018) suggests that promoting women's entrepreneurship can help alleviate poverty and address gender inequalities. Buller (2017) emphasises that empowerment and motivation are key factors contributing to an individual's competence. Winters et al. (2018) support the idea that empowerment grants women greater autonomy over their lives, including their sexual health and basic rights. Consequently, it was determined that incorporating the empowerment of WiT would enable the exploration of the dimensions in the SA tourism sector context, depicted in Fig. 1.

To the best of our knowledge, no previous study has been conducted on the *Empowerment of WiT* specifically within the context of the SA tourism sector, highlighting the contribution of the current study. This research also makes a methodological contribution by utilising statistical techniques that facilitate the development of new

constructs and thoroughly investigate the nature and impact of relationships between these constructs. Tourism associations such as Statistics South Africa (STATSA), Tourism Business Council of SA (TBCSA), and the WiT provincial chapters could benefit from the study's results as it provides guidance for addressing entrepreneurship and *Empowerment of WiT*. The *Empowerment of WiT* construct comprises three dimensions: Entrepreneurship, Competence, and Autonomy. Given the limited existing research on WiT empowerment, there is an opportunity to establish a theoretical foundation for a better understanding of the role of motivation of WiT in the South African tourism sector. Future studies could explore the structural conditions that can support WiT in becoming successful entrepreneurs in the tourism industry (Moswete & Lacy, 2015).

Limitations

The current study stands out as no prior research has utilised measurement instruments to examine *Empowerment of WiT* through Entrepreneurial Skill, Competence, and Autonomy in SA. Consequently, it was not possible to compare the reliability of the questionnaire used in this study, which focused on the constructs, with the reliability of measurement instruments used in previous studies that investigated similar constructs. The sample profile of the study exhibits unevenness concerning age, province of residence, and employment sector, which necessitates a cautious interpretation of the study's results. To address this issue and achieve a more balanced sample profile, future studies could incorporate additional sampling methods, such as quota sampling, alongside snowball sampling.

Recommendations

As mentioned in the introduction, the study was conducted during the peak of the covid-19 pandemic, and the methodology was adjusted accordingly. Snowball sampling was utilised, and data collection primarily took place through email and social media platforms such as LinkedIn. Additionally, this sampling method provides a greater opportunity for women to participate in the study. By combining an online questionnaire platform with digital communication channels and online communities, you may effectively disseminate a questionnaire to a larger and more diversified audience while taking advantage of the snowball effect. This guarantees a simple and convenient experience for both participants and researchers.

This study, as specified in the methodology discussion, employed a quantitative approach to examine *Empowerment of WiT* quantitatively. However, the quantitative research method restricted respondents from expressing their opinions qualitatively. Future studies could consider employing a mixed-method research design, which would enable respondents to provide both quantitative scores and qualitative feedback.

The view that social reality, including gender-related elements, is produced through human interactions and cultural circumstances is shared by constructivist theory and gender theories. They give a framework for understanding how gender roles and identities are shaped and negotiated in social circumstances rather

than being fixed. Feminist epistemology forms the basis for feminist methodology, acknowledging the distinction between women's knowledge and androcentric research (Ardevini-Brooker, 2002). This research approach aligns with a political commitment to recognise and transform gender relations, underscoring the political nature of social research (Walliman, 2019). By incorporating a gender perspective in tourism evaluation, Figueroa-Domecq and Segovia-Perez (2020) reveal notable gender differences influenced by social constructions that disadvantage women in various areas. Examining the limited application of feminist theories in the tourism sector is deemed crucial for advancing knowledge in this field (Figueroa-Domecq & Segovia-Perez, 2020).

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Addendum 1

See Table 2.

Table 2 Pearson correlation coefficients among the original 14 items (Pearson correlation/Spearman's rho)

Items	E1	E2	E3	E4	E5	E6	E7	E8	E9	E10	E11	E12	E13	E14
E1 In general, do you agree that women have the creativity to be tourism entrepreneurs?	1	.53**	.40**	.21**	.28**	.27**	.25**	.32*	.38**	-0.02	-0.03	-0.05	.21**	.25**
E2 Do you agree that women have the skills to manage changing situations in the tourism work environment?	.32**	1	.56**	.25**	.32**	.34**	.38**	.47**	.458**	0.03	.14*	0.00	.33**	.28**
E3 In your opinion, do women have the ability to manage tourism business risks?	.31**	.60**	1	.32**	.26**	.30**	.28**	.39**	.458**	0.08	.21**	0.02	.31**	.22**
E4 How important is it for women to effectively manage finances in the tourism business?	.21**	.18**	.28**	1	.39**	.36**	.35**	.21**	.346**	0.06	0.09	-0.03	.37**	.44**
E5 How important is it to recognize the competence of women in the tourism business?	.20**	.24**	.22**	.37**	1	.38**	.48**	.29**	.286**	-0.11	-0.05	-0.11	.50**	.51**
E6 How important is it for women to champion the ideas of others in the tourism workplace?	.22**	.29**	.27**	.39**	.30**	1	.52**	.26**	.428**	0.07	0.08	0.08	.33**	.37**
E7 How important is it for women to propose creative solutions to problems in the tourism workplace?	.23**	.38**	.30**	.33**	.50**	.47**	1	.34**	.372**	0.02	0.11	0.04	.40**	.50**
E8 In your opinion, are women able to complete their tasks well in the tourism workplace?	.23**	.50**	.39**	.15*	.20**	.17**	.35**	1	.451**	0.04	.14*	0.00	.39**	.29**
E9 Do you agree that women in tourism often have innovative ideas?	.28**	.44**	.48**	.34**	.24**	.48**	.41**	.43**	1	0.07	.16*	0.03	.34**	.26**
E10 Do you agree that women have the freedom to express opinions in the tourism workplace?	0.03	0.03	0.12	0.06	-0.12	0.03	-0.01	0.05	0.066	1	.53**	.57**	0.04	-0.02
E11 Do you agree that women have the ability to make decisions related to property?	0.04	.17**	.25**	0.09	-0.07	0.06	0.08	.19**	.235**	.53**	1	.53**	0.08	0.09

(continued)

Table 2 (continued)

Items	E1	E2	E3	E4	E5	E6	E7	E8	E9	E10	E11	E12	E13	E14
E12 Do you agree that management in the tourism industry displays trust in women to make the appropriate decisions in their jobs?	0.01	0.02	0.06	-0.01	-0.12	0.02	-0.01	-0.00	0.01	.56**	.53**	1	0.03	0.03
E13 In the tourism workplace, how important is it for women to have the authority to make job related decisions?	.18**	.26*	.23**	.28**	.37**	.28**	.44**	.28**	.23**	0.06	0.07	0.06	1	.60**
E14 How important is it for women in tourism to have the independence to do their jobs?	.28**	.32**	.25**	.45**	.42**	.39**	.55**	.24**	.29**	-0.01	0.06	0.04	.52**	1

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Motivating Human Resources in the Hospitality Industry. A Literature Review



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Abstract The aim of this paper is, on the one hand, to codify human resources motivation theories and, on the other hand, to highlight their advantages in employee performance and hotel organization. In the context of analyzing the concept of motivation, human resources motives that enhance the performance of hotel employees are investigated. The Content Analysis methodology is employed, based on which the theories of motivation are classified in chronological order (per decade). In this way, the characteristics and impact of motivational theories on hotel human resources are highlighted. The present paper, by documenting the evolution of motivation theories over time and connecting them to the motivation of employees in the hospitality industry, leads to an original codification of the theory that future researchers can utilize.

Keywords Motivation · Human resources · Human resources management · Hotels · Content analysis · Incentives · Codification

JEL Classification M12 · M54 · O15

1 Introduction

Several definitions have been formulated for the motivation of employees, with Mitchell (1982, p. 81) initially arguing that “*motivation is a psychological process, which causes the stimulation, direction, and persistence of voluntary actions that are oriented towards a goal,*” while Wiley (1997) adds that motivation is constantly changing according to individual characteristics, i.e., those that stem from the culture and psyche of the person, but also the social ones. On the other hand, Pinder (1998, p. 11) suggested the term “Work Motivation,” according to which motivation is “*a set*

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of energetic forces that originate both within as well as beyond an individual's being, to initiate work-related behavior and to determine its form, direction, intensity, and duration.“ Along the same line, Seto (2019) defines motivation as a psychological process that energizes and directs behavior. Ryan and Deci (2000b) distinguish work motivation into two main categories: (1) intrinsic motivation, according to which someone does something because it is interesting or enjoyable for him/her, i.e., the execution of a creative work, and (2) extrinsic motivation, according to which someone does something because an external stimulus is existent, i.e., the provision of wages by the management of hotels.

The codification of motivation theories is the primary goal of this paper. Through the Content Analysis (CA) of the literature, the investigation and analysis of the characteristics of each theory from the 1940s to the present day are carried out, highlighting the advantages that each motivation theory offers to strengthen the hotels' human resources (HR) performance. The CA methodology led to the original codification of hotel employee motivation, which can guide future researchers' motivational research. Furthermore, this paper's codification of motivation theories will provide a valuable information base for hotel executives to identify the appropriate HR motivation strategies for their hotel.

2 Literature Review

Motivation Theories in the Hotels' Working Environment

Theories on human motivation (especially employees) began to develop in the early twentieth century. One of the first researchers in this field was Maslow (1943), who formulated the Hierarchy of Needs Theory, according to which there are five different levels of human needs: (1) physiological, (2) safety, (3) social, (4) self-esteem and e) self-actualization. According to Maslow (1943), employees initially try to satisfy their basic needs and gradually move toward higher levels. Tantua and Chidirem (2020) argue that in hotels, to motivate the behavior of employees effectively, management must follow policies that satisfy all the needs mentioned above.

Ten years later, Skinner developed the Reinforcement Theory of Motivation (1953), emphasizing that there are two types of reinforcement of human behavior, positive, and negative. Positive reinforcement leads to the right behavior of employees in the long term, while negative reinforcement removes an undesirable stimulus to reinforce a specific behavior. Recent research confirms this conclusion for the hotel sector (James, 2020; Kalousis, 2019). Herzberg et al. (1959), in the same decade, divided motivation into two main factors: (1) Motivational Factors which contribute to employees' satisfaction enhancing their performance as they relate to achievement, responsibility, recognition, and others, and (2) the Hygiene Factors that reduce job dissatisfaction but do not have an essential role in motivating HR, such as salary and working conditions. Sobaih and Hasanein (2020) argued that in the hotel sector, in

some cases, extrinsic motivation factors such as monetary remuneration and working conditions may play a decisive role in the job satisfaction of HR.

In the 1960s, McClelland presented the Theory of Needs (1961), which supports that human behavior is determined by: (1) the need to achieve goals and distinction, (2) the need for power, i.e., someone's will to make others behave in a specific way, (3) the affiliation need, which includes the desire to develop friendly and interpersonal relationships. Tran et al., (2022, p. 285) emphasize that "*hotel value and cleanliness would attract guests with a high-power motive whereas hotel service and quality would attract guests with a high affiliation motive*". Adams (1963) introduced the Equity Theory of Motivation, highlighting the importance of equality between employees and emphasizing that when the feeling of justice is absent, their motivation also decreases. Cheng et al. (2020) argue that hotel managers should monitor the relationships between employees and customers and between employees and prevent the occurrence of rude behaviors that may undermine the sense of fairness and justice. Vroom (1964), with the Expectancy Theory, pointed out that employees adjust their behavior according to their goals and desires, while their motivation is based on the belief that the effort they put in will have the corresponding reward. Sari et al. (2019), in agreement with Vroom (1964), emphasize that at a practical level, to achieve compelling motivation of HR, hotel management should focus on improving working life, remuneration systems and training.

In the following decade, Hackman and Oldham (1976) introduced the Job Characteristics Model, which proposed that five important job components exist that lead to positive outcomes for employees and companies: (1) skill variety, (2) job identity, (3) project importance, (4) feedback and (5) autonomy, components that are still supported today in the hotel sector (Ma et al., 2022). The Social Learning Theory was expressed a year later by Bandura (1977), suggesting that people adopt a particular behavior by observing other behaviors and their consequences. Zhao and Zhou (2021) emphasize that Social Learning Theory finds application in the modern hotel sector in motivating HR in sustainable social, economic, and ecological development.

In the mid-80 s, the Self-Determination Theory of Deci and Ryan (1985) was developed, according to which people wish to feel good, so their activities move toward this goal. The intrinsic motivations that people develop are related to (1) competence, meeting the need for efficiency, (2) a sense of belonging through communication, and finally, (3) autonomy. Additionally, they report that employees' intrinsic or autonomous motivation is linked to their health, job satisfaction, and commitment to the company, thus acting from a sense of willingness and choice (Hai & Park, 2021; Ryan & Deci, 2017). On the contrary, extrinsic or controlled motivation results in stress, lack of quality and limits innovation and creativity as it is applied in an environment of pressure and obligation (Ryan & Deci, 2000a; Stanisić & Čerović, 2021).

The Cause-Motive-Behavior-Goal Theory of Leavitt et al. (1990) underlines that human behavior is directed toward specific goals, while at the same time, it is influenced by various causes and motivated by actions aiming to achieve those goals. A subsequent motivation theory is that of Von Gilsa and Zapf (2013). This theory is

related to emotion regulation in services' workplace, so members of an organization aim to control and balance their emotions through cooperation with colleagues and communication with customers (Stavrinoudis & Kakarougkas, 2018). Finally, Perryer et al. (2016) formulated the Gamification theory, which argues that the implementation of digital game features, such as leaderboards, trophies, achievements and others in work environments, can have a positive effect on motivating employee behavior. The importance of gamification is also pointed out by Birtek et al. (2022), stating that this theory of motivation is one of the most suitable for hotel companies.

Based on the above, it can be concluded that the theories of motivation are evolving, and the types of motivation are constantly enriched with new data. It was also found that (1) motivation has a vital role in businesses, (2) HR are motivated by safety, good working conditions, but also the challenges given to them (Badubi, 2017), (3) motives can have a different effect from person to person (Montana & Charnov, 2008), while their impact depends on age, living conditions, career level, and other. Therefore, motivation is a process that is determined by social and individual characteristics. In contrast, motivation within organizations is a cause of stimulation and direction of an employee's behavior (Stavrinoudis & Kakarougkas, 2017).

The Factors of Human Motivation in Business

The content and meaning of motivation—as an internal force—can be different for each person, as the person himself and the environment in which he/she is active are the two factors that will essentially determine the motive and its content (Gandalf, 2005). Nohria et al. (2008) developed four fundamental human motivation factors: (1) the drive to acquire, (2) the will to commit, (3) the need to understand and learn, and d) the drive to advocate. Employees are distinguished between those who lack intrinsic motive and can be motivated through new challenges or the assignment of more responsibilities and those who lack extrinsic motive and are motivated through promotions or extra rewards (Lawrence & Jordan, 2009). Based on this theory, Putra et al. (2017) argue that extrinsic and intrinsic motives are essential in employee effectiveness and commitment. However, intrinsic motives enhance HR commitment to the firm more, especially when they hold jobs with straightforward content and no high interest.

Tsounis et al. (2014) also agree with the above point of view, stressing that endogenous factors are ultimately the primary motivations of employees, and more specifically, recognition, social acceptance, and training. These factors contribute to the motivation of HR. Their participation in an organization's decision-making processes can strengthen their confidence in the execution of tasks so that, ultimately, employees become more and more active in the company's activities (Aryee et al., 2012). At the same time, the availability of appropriate resources will enable HR not only to satisfy the needs of customers adequately but also to transform into a resourceful and dynamic mean, which will have the skill to respond immediately to the demands of the market (Ng & Sorensen, 2008). Olafsen et al. (2015) point out that the management must support the needs of employees, thus creating the appropriate business climate in which the primary goal remains the satisfaction of the psychological needs

of HR. In the same vein, Ankli and Palliam (2012) state that individuals as employees are more productive when they are motivated by their interest in the work, the challenges they manage, and the internal satisfaction they get, as the pressures exerted by supervisors and additional rewards that may be offered are not sufficient incentives for their performance.

Andersen et al. (2007) defined job satisfaction as a pleasant emotional state of employees that stems from their work experience and is created when their job fulfills their needs and desires. Job satisfaction depends mainly on the employee's perception of how well he/she is performing in relation to what he/she wishes and aims. Nevertheless, job satisfaction remains an emotional element, mostly implied and invisible (Kumar & Singh, 2011). More specifically, as Doolen et al. (2003) state, job satisfaction originates and grows through communication, knowledge sharing, and collaboration among employees, as these practices enhance HR effectiveness.

Finally, motivating employees in combination with taking on more responsibilities leads to improved performance, and in this way, job satisfaction is achieved, which also contributes to customer satisfaction (Taylor, 2015). Santa Cruz et al. (2014) suggest that managers should highlight all those policies that affect HR satisfaction, such as placing employees in positions that match their characteristics and personality and implementing appropriate training programs to improve their skills.

The Elements of Motivating HR and their Application in Hotel Businesses

In the mid-90s, researchers such as Amiable et al. (1994) stated that intrinsic motivation includes the ability to make decisions and the active participation of HR in the company's activities, while competition, evaluation, and pressure exerted by management belong to the extrinsic motivation of employees. In these two categories of motivation, Kreye (2016) through research in service companies, including hotels, added that having an exciting job, developing skills, and internal relations between employees and the company are related to the intrinsic motivation of HR, while financial rewards, work-life balance, and positive evaluation by supervisors or colleagues increase extrinsic employee motivation.

Before implementing any incentive program in hotel companies, executives must identify the incentives that will strengthen employees' self-confidence and develop shared goals and values that act as motivational factors, ultimately affecting their performance (Vetrakova & Mazuchova, 2016). Job rotation, to make hotel employees more interested in their work, combined with the prevalence of a pleasant working environment, strengthen the intrinsic motivation of HR and, by extension, their loyalty to the company (Putra et al., 2017). The importance of the work subject is confirmed by a) Ramlall (2004) stating that the work subject is what will strengthen the motivation of HR; b) Chalofsky and Krishna (2009), who argue that if the subject is systematically renewed, it will contribute to the commitment of employees, and c) Taguchi (2015) who highlights the work subject together with the work-life balance as a source of motivation for the HR (Table 1).

In companies where HR are in direct contact with customers, such as hotels, employee support from the management, recognition, and provision of rewards

Table 1 Intrinsic motives of HR and their main traits

Element of motivation	Motivation trait
Autonomy	Job satisfaction and employee commitment to the company increase (Hackman & Oldham, 1976; Ryan & Deci, 2017)
Enabling employees to make decisions and participate in the company's initiatives	The self-confidence and the involvement of HR in daily hotel operations are increased (Chiang & Jang, 2008)
Having an interesting job and job security	The dedication of employees to their tasks, but also to the company itself, is strengthened. Additionally, professional goals are achieved individually and collectively (Badubi, 2017; Kreye, 2016; Putra et al., 2017; Taguchi, 2015)
Communication	Improving communication will result in job satisfaction, collaboration between employees, HR effectiveness, and the creation of a climate of trust within the organization (Doolen et al., 2003; King & Lee, 2016; Ryan & Deci, 2017; Stavrinoudis & Livadioti, 2011)
Support and recognition of employees	A significant role in employees' mental strength and well-being, especially those employed in businesses where they come into direct contact with customers (Chiang & Jang, 2008; Michel et al., 2012)

plays a dominant role in motivating them (Michel et al., 2012). In addition, Stavrinoudis and Livadioti (2011) complement that monetary rewards and communication between employees and managers are essential motives for the HR of hotel companies. Rewards, encouragement for decision-making, and above all, the management's support and recognition of the employees' work act as key motivational elements that will raise the morale of the HR (Chiang & Jang, 2008) (Table 2).

Table 2 Extrinsic motives of HR and their main traits

Element of motivation	Motivation trait
Granting additional financial rewards	Those incentives reduce the dissatisfaction of HR but do not contribute substantially to their motivation (Chiang & Jang, 2008; Kreye, 2016; Michel et al., 2012; Putra et al., 2017; Stavrinoudis & Livadioti, 2011.)
Justice	There is transparency in how HR issues and rewards are handled. Also, employees feel more secure (Nohria et al., 2008)
Evaluation	It can take many forms and be carried out by management, colleagues, or customers (Amiable et al., 1994)
Workplace conditions	It includes working hours, the conditions prevailing in the facilities, and the working environment (Badubi, 2017; Herzberg et al., 1959)

The Advantages of Employee Motivation in Hotel Businesses

The primary motivators of hotel employees are financial rewards, career development, education, social security, and flexible hours (Wildes, 2008). Specifically, Vetrakova and Mazuchova (2016) point out that in hotel chains, incentives focus on financial rewards and career development, while in smaller accommodations, they focus on praise and good relationships with colleagues and superiors. Extrinsic motivators remain high in the preferences of hotel employees, as they are paid less than those in other industries, but intrinsic motivators matter most to them (Chiang & Jang, 2008). Extrinsic motivation is stronger in employees who have been employed for a long time or hold positions higher in the hierarchy, so motivation is mainly linked to the recognition of seniority and the power of the position (Kotera et al., 2018).

Employee performance is significantly affected by motivation, but through intrinsic motivation, burnout is reduced because when the personal achievements of HR are limited, the possibility of emotional and physical exhaustion in the work increases (Hsu, 2013). Jayaweera (2015) states that employees are more effective when motivated because it determines explicitly the working conditions and vice versa. In other words, when the work environment is not pleasant, the motivation and disposition of the HR for work automatically decrease along with their effectiveness, respectively, when the motivation for work is not satisfactory, the work environment becomes less pleasant (Table 3).

The employees' working conditions and personal motivation have positive results for him/her and the company. In contrast, extrinsic or controlled motivation reduces creativity and undermines innovation because HR act under pressure (Kyndt et al., 2012). Tsai et al. (2015) add that managers should create a friendly working environment where employees develop ideas, highlighting their creativity. In other words, the management of hotels, through their actions, can support employees' motivation, knowledge sharing, fairness, and innovation.

Following the above, the internal communication of hotel employees is considered essential, as cooperation, trust, and understanding prevail (King & Lee, 2016). Trust between HR acts as a critical motivator for them, based on Kukanja and Planinc (2012). Hotel employees are in contact with guests, and their work becomes complex and demanding, while the frictions that may exist with their colleagues reduce their job satisfaction and force them to resign (O'Neill & Davis, 2011). Therefore, there is a need for effective internal communication between employees, such as the one described by King and Lee (2016), that will mitigate the above differences and stimulate their motivation. However, regardless of the solutions given by communication to employees' retention, Jung and Yoon (2016) argue that the work subject ensures the commitment of HR in hotels and the enhancement of their productivity.

Table 3 Content of incentives for hotel employees and their results

Incentives	Traits	Results
Financial rewards	This motive is popular among employees of large hotels, especially those with high positions and seniority (Vetrakova & Mazuchova, 2016)	Increased customer satisfaction and enhancement of the overall performance of the hotel (Taylor, 2015; Vetrakova & Mazuchova, 2016)
Maintaining good relations with colleagues and management	It mainly concerns the HR of small hotel units (Vetrakova & Mazuchova, 2016)	
Intrinsic motivation	Stimulating a sense of accomplishment from employees (Chiang & Jang, 2008). In some cases, intrinsic motivation matters most to the employees (Kotera et al., 2018)	The possibility of burnout is reduced, and organizational activities are intensified (Hsu, 2013)
Working conditions	Employee creativity is enhanced, and conditions that promote the development of new ideas prevail (Jayaweera, 2015; Kyndt et al., 2012; Tsai et al., 2015)	HR become more efficient and contribute to the achievement of innovation by the enterprise (Jayaweera, 2015; Kyndt et al., 2012; Tsai et al., 2015)
Communication	Two-way interaction between hotel employees and hotel employees and guests (King & Lee, 2016)	A climate of cooperation and trust is created to reduce friction and improve the organization's performance (Kukanja & Planinc, 2012; O'Neill & Davis, 2011)
Working positions with an interesting subject	Hotel HR are becoming more productive, and interest in their duties is increasing (Putra et al., 2017)	HR engagement and productivity are enhanced as they are engaged with more enthusiasm and attention (Jung & Yoon, 2016)

3 Methodology

The CA methodology was used, as it is suitable for studying motivation theories and their connection with the working environment of hotels. CA is a systematic method for compressing many words into short text, based on coding rules, and is particularly useful for managing large amounts of data (Stemler, 2001). CA is a research method that, to generate reproducible and valid conclusions (Krippendorff, 1980), follows a set of procedures for coding and extracting data found in a text (Weber, 1985). For this paper, the most popular motivational theories from the 40s to nowadays were first studied and recorded. Twelve theories were collected, the content of which was further examined and analyzed by linking it to contemporary research on the motivation of hotel employees. More specifically, each recent research on HR motivation in the hospitality industry was investigated compared to the content of

each motivation theory. Based on this methodology, new elements and data emerged for employee motivation strategies of modern hotel companies, highlighting their advantages for them and the organizations.

4 Conclusions

Valuable conclusions are drawn on the specific topic through the CA methodology employed in this paper and the coding of employee motivation elements in hotels. Initially, from Maslow's Hierarchy of Needs Theory (1943) to the Gamification Theory of Perryer et al. (2016), different characteristics are identified for each theory, confirming that the concept of motivation is constantly enriched with new elements concerning: human needs (Maslow, 1943), justice (Adams, 1963), expectations (Vroom, 1964), work characteristics (Hackman & Oldman, 1976), self-determination (Deci & Ryan, 1985), emotions (Von Gilsa & Zapf, 2013), but also the use of new technology (Perryer et al., 2016). Therefore, motivation theories have evolved over the decades, covering different topics, the interpretation of which reveals the multidimensional nature of the concept of motivation and its content.

Based on the literature review, human motives are divided into two main categories: intrinsic, such as the possibility of new challenges and assigning more responsibilities to employees, and extrinsic, which include mainly financial rewards. The main feature of both categories of motivation is that they are determined by the individual's personality and the external environment in which he/she lives and operates (Gandalf, 2005). The CA of the theories studied in this paper confirms that the majority of motivation researchers agree that intrinsic motivations are those that matter most for HR (Ankli & Palliam, 2012; Chiang & Jang, 2008; Hsu, 2013; Kotera et al., 2018; Lawrence & Jordan, 2009; Putra et al., 2017; Tsounis et al., 2014), even in the hospitality industry, whose employees place great importance on financial rewards, i.e., extrinsic motivations (Chiang & Jang, 2008; Michel et al., 2012; Putra et al., 2017; Stavrinoudis & Livadioti, 2011; Vetrakova & Mazuchova, 2016; Wildes, 2008) due to the particularly demanding working conditions prevail (O'Neill & Davis, 2011). The importance of intrinsic motivation in times of crisis is also pointed out (Stavrinoudis et al., 2022) (Fig. 1).

In addition, the coding of motivation theories confirms that the application of its elements results in the commitment of HR in organizations (Hackman & Oldman, 1976; Ryan & Deci, 2017; Chalofsky & Krishna, 2009; Taguchi, 2015), namely in hotels (Jung & Yoon, 2016; Putra et al., 2017). In this conclusion, Armstrong (2006) adds that a hotel motivation strategy strengthens employees' loyalty. It establishes an environment where they are offered significant incentives to adopt responsible work behavior that significantly improves their skills. Specifically for the hospitality industry, the literature review highlights the role of intrinsic motivation, as it is concluded that HR become more effective (Jayaweera, 2015), reduce the possibility of burnout (Hsu, 2013), while at the same time creating a climate of cooperation and

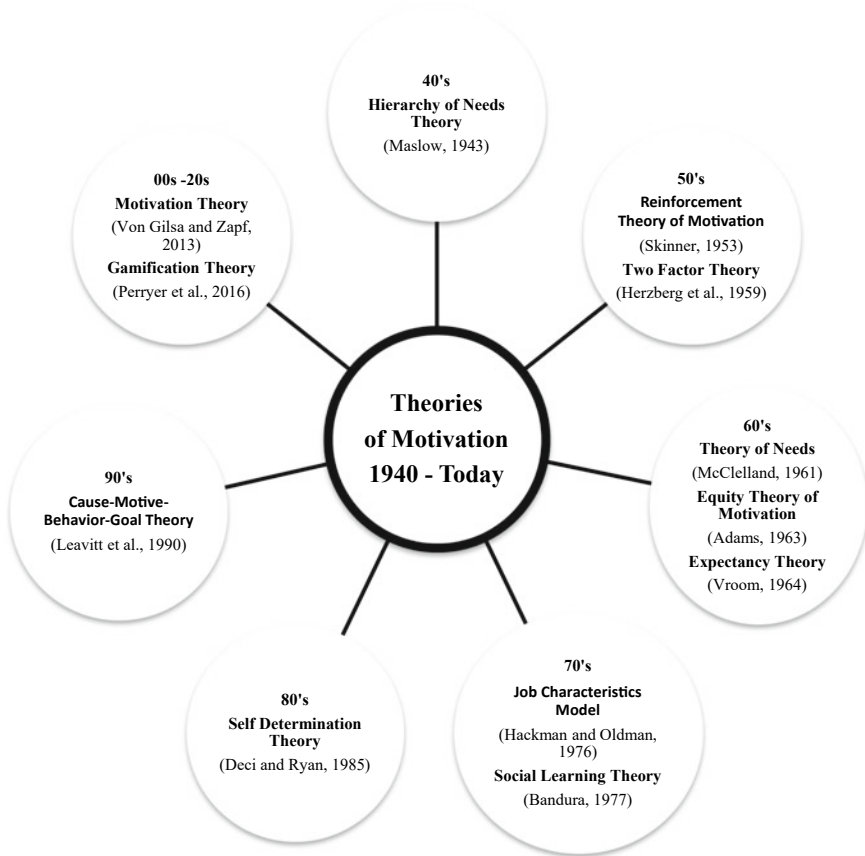


Fig. 1 Theories of motivation from the 1940s to the present. *Source* Edited by the authors

trust within hotels (King & Lee, 2016) with the result of improving their performance (Tsai et al., 2015).

5 Theoretical and Practical Implications

The contribution of this paper is the codification of motivation theories from the 1940s to the present day and their connection to the motivation of HR in hotels by highlighting their main characteristics. The above created a background text that other researchers can use as a database that facilitates the study of each type of motivation separately. Moreover, the analysis and connection of the motivation theories with the HR of the hotels that was carried out give a step for a better scientific investigation of the hotel employees' motivation elements.

The practical presentation of the motivation theories significantly facilitates the work of hotel executives to reorganize and implement the appropriate Human Resources Management strategy. In addition, hotel managers using the data and findings presented in this paper, can choose, and implement specialized elements of motivating the HR they manage to limit any problems that arise in terms of operation and performance.

6 Further Research

Based on this paper, an analytical comparison of individual motivation theories over the decades can be carried out, offering new data and conclusions regarding their application in the modern business environment. More specifically, future researchers can identify and analyze the strengths and weaknesses of the specific theories, to highlight the appropriate motivation elements that will contribute to the smooth operation of hotels and enhance their employees' performance. Through coding and analyzing the theories presented in this paper, new research can focus on combining HR motivation with other concepts, such as crisis management or achieving competitive advantage that will highlight the importance of motivation in the performance of the employees but also the business competitiveness.

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Work Values as Projections of Personal Values at Work: Evidence from Tourism and Hospitality Students



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Abstract Despite the importance of work values in students' career development, little conceptual research has focused on articulating the dimensions represented within the construct and the exploration of empirical validity has been lagging. We provide evidence of validity for the conceptualization of students work values as projections of their personal values at the context of work. The data were collected from a Millennial-aged sample (born between 1981 and 1997) of tourism and hospitality students from Asia. Using confirmatory factor analysis, we show that this conceptualization is reliable and has better fit than competing theoretical models drawn on theory of work adjustment and self-determination theory. The cognitive, instrumental, affective and prestige typology of students work values provides a theoretically aligned approach, valuable to practitioners searching to explicate candidate employees' expectations towards work. It also connects the stream of work values literature with the field of basic human values, directing future research within and beyond hospitality and tourism.

Keywords Work values · Millennials · Basic human values · Asian · Students

JEL Classification J62

1 Introduction

The construct of work values attains a status equalling that of abilities and interests—the core variables in the array of individual differences in career development theory (Busque-Carrier et al., 2022). Super's Work Values Inventory (SWVI; Super, 1970), the first formal assessment of the construct, has played a pivotal role in this direction

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375

and hospitality and tourism (H&T) research was at the forefront of its introduction. Indeed, Abraham Pizam and his associates were amongst the first to test its reliability and applicability using a series of studies with undergraduate H&T students (Neuman et al., 1980; Pizam & Lewis, 1979; Pizam et al., 1980). Their work was an important contribution in establishing work values as a crucial determinant of career choice and work motivation in H&T research. Unfortunately, a theme running through discussions on the topic of students work values for the past 15 years (e.g. Chen & Tesone, 2009; Papavasileiou & Lyons, 2015; Papavasileiou & Stergiou, 2023) has been the concern that the literature is hindered by the inability of the H&T field to define the construct. The partial decoupling in the 80s and 90s of tourism research from that in general management and social sciences (Shaw & Williams, 2009) and the relative neglect of work values research, to incorporate the developments of the personal values research (Arciniega et al., 2019), played an important role in this direction.

To address this limitation, Papavasileiou et al. (2017) developed a unifying conceptualization that draws on basic human values theory (Schwartz, 1992) as applied to the H&T work settings. Since the turn of the century, Schwartz's theory has been the most widely used framework for conceptualizing personal values in psychology research (Ramírez et al., 2022). Our aim is to provide evidence for conceptual validity for the conceptualization of students work values as projections of their personal values at the context of work in H&T. To accomplish this, we use confirmatory factor analysis with data collected from a Millennial-aged student sample from Asia. Moreover, we test the fit of this conceptualization against two competing theoretical frameworks based on the theory of work adjustment (Lofquist & Dawis, 1978) and self-determination theory (Ryan & Deci, 2000).

2 Empirical Validity

2.1 Research Design and Reliability Analysis

The work values data for testing the fit of the above conceptualizations at the pre-career level were collected from Millennial-aged students enrolled in undergraduate H&T programmes offered in English in Switzerland and Malaysia. The gender distribution was almost equal and participants' origins were from countries including China and Hong Kong (12%), Malaysia (31%), Indonesia (22%), Singapore (18%), South Korea (5%) and Thailand (11%). Participation was voluntary and anonymous. The language of the questionnaire was English, as was the instruction language of the programme. Work values were assessed using a modified 20-items version of Lyons Work Values Survey (LWVS; Lyons, 2003).

Table 1 reveals an acceptable level of internal consistency and reliability since the corrected item-rest-correlation for the 20 work value items was more than 0.30 (Hair et al., 2014; p. 101) and the Cronbach's alpha coefficients of the designated factors were higher than 0.70 (Nunnally, 1978). In addition, the sample size ($n =$

201) and the participants per measured variable ratio (10 to 1) reflect that the data were adequate for conducting confirmatory factor analysis (see Fabrigar et al., 1999).

2.2 *Confirmatory Factor Analysis*

Table 1 gives that each of the five work values items was adequately loaded on their four designated factors (> 0.32 ; Wang & Li, 2022) and we therefore proceeded to test the overall fit with the following indices: (a) the ratio of chi-square against the degree of freedom (χ^2/df); less than 2.0 (Bollen, 1989), (b) the standardized root mean square residual (SRMR); less than 0.08 (Hu & Bentler, 1999), (c) the root mean square error of approximation (RMSEA); less than the 0.08 (Browne & Cudeck, 1989) and (d) the comparative fit index (CFI), and the Tucker–Lewis index (TLI); more than 0.90 (Hu & Bentler, 1999).

Table 2 reveals a moderately acceptable fit for Model 1 ($\chi^2/\text{df} = 2.26$; SRMR = 0.06; RMSEA = 0.08; CFI = 0.84; TLI = 0.81) caused from the error terms of innovation (cognitive) and organizational image (prestige) which were highly correlated for certain work values items outside their designated factors, cognitive and prestige, respectively, and therefore were omitted from further analysis. Accordingly, esteem (affective) and stress avoidance (instrumental) were dropped from the affective and instrumental factors, respectively, so as to retain an equal number of items per factor. Durvasula et al. (2006) note that in cases of multi-type constructs, it is preferable to have an equal number of items per type. In a stepwise process, the revised 16-item model (Model 1-R hereafter, see Fig. 1) improved the results in all fit indices estimations and reached an acceptable model fit ($\chi^2/\text{df} = 1.71$; SRMR = 0.05; RMSEA = 0.06; CFI = 0.92; TLI; 0.90).

2.3 *Metric Invariance and Comparison with Competing Models*

Having accomplished an acceptable model fit, we tested the metric invariance for Model 1-R in relation to gender. The fit of two nested models was compared: the model hypothesizing loadings equality between males and females and the unconstrained model. The variance estimates for all factors were positive, and the value of the chi-square among the competing models (unconstrained vs fully constrained) was not significant ($\Delta\chi^2 = 31.58$, $\text{df} = 23$, $p = 0.109$) indicating that the two groups are invariant.

Furthermore, the second-order model was compared against two structurally competing models; the baseline model (Model 2 hereafter, see Fig. 1), which assumes that all variables (in this case, the 16 work values items) are loaded on a single work value factor, and the equivalent first-order four factor model (Model 3 hereafter,

Table 1 Reliability analysis

Having a work...	Label	IRC	α^*	Loadings
<i>Cognitive ($\alpha = 70$)</i>				
... that provides you the opportunity to promote your career	Advancement (ADV)	0.54	0.61	0.57
... where you organize and direct the duties and tasks of others	Autonomy (ATN)	0.33	0.69	0.42
... that you find interesting, exciting, and engaging	Interest (INT)	0.52	0.61	0.69
... allows you to use the skills and knowledge	Abilities (ABL)	0.49	0.63	0.59
... in an organization preoccupied with innovation and change	Innovation (INN)	0.38	0.68	0.55
<i>Prestige ($\alpha = 73$)</i>				
... where you organize and direct the duties and tasks of others	Authority (ATH)	0.48	0.69	0.48
... where you actively participate in the decision-making process of the organization	Decision-making (DEC)	0.52	0.67	0.58
... where your opinion affects organizational outcomes	Influence (INF)	0.54	0.66	0.60
... with a job title that is looked up by others in the organization and society	Status (STS)	0.47	0.69	0.50
... in an organization that you feel proud to work for	Image (IMG)	0.44	0.70	0.70
<i>Instrumental ($\alpha = 72$)</i>				
... that provides you the opportunity to have special rewards	Benefits (BEN)	0.43	0.69	0.46
... work that provides you the opportunity to earn a substantial income	Earnings (EAR)	0.47	0.68	0.64
... with convenient working hours	Schedule (SCH)	0.50	0.66	0.57
... that provides you with stability and continuity	Stability (STA)	0.52	0.66	0.70
... with relaxed atmosphere that causes little pressure or stress	Stress avoidance (STR)	0.51	0.67	0.53
<i>Affective ($\alpha = 73$)</i>				
... where colleagues are keen in developing interpersonal relationships, friendships	Colleagues (COL)	0.57	0.66	0.66
... that provides you with the opportunity to daily interact with customers	Interaction (INR)	0.45	0.70	0.49

(continued)

Table 1 (continued)

Having a work...	Label	IRC	α^*	Loadings
... where the boss creates and maintains an atmosphere of mutual respect	Owner (OWN)	0.55	0.67	0.67
... that enables you to help others and make a contribution to society	Social (SOC)	0.46	0.70	0.59
... where you are being recognized and valued for your skills and personality	Esteem (EST)	0.45	0.71	0.58

Note The items were introduced with: Please indicate how likely each item is to be TOP PRIORITY in deciding whether to accept a job or remain in a job on a six-point Likert scale ranging from “1 = Extremely Likely” to “6 = Extremely unlikely”; **IRC** = Item-rest-correlation; α = Cronbach’s Alpha

Table 2 Model fit comparisons

	χ^2/df	TLI	CFI	RMSEA	SRMR	AIC
Model 1 (2nd order–4 factors)	2.26	0.81	0.84	0.08	0.06	462.44
Model 1-R	1.71	0.90	0.92	0.06	0.06	243.12
Model 2 (one factors)	2.10	0.85	0.87	0.07	0.06	282.15
Model 3 (1st order–4 factors)	1.71	0.90	0.92	0.06	0.06	243.35
Model 4 (intrinsic/extrinsic)	2.08	0.85	0.87	0.07	0.06	279.95
Model 5 (2nd order–3 factors)	2.01	0.86	0.88	0.07	0.06	272.48

see Fig. 1). We have further added the comparison of two theoretically competing models; the dichotomization model (Model 4 hereafter, see Fig. 1) in which work values are divided into extrinsic and intrinsic aspirations (self-determination theory, see Ryan & Deci, 2000) and the model that trichotomize the conceptual space of work values, (Model 5 hereafter, see Fig. 1), which assumes that work values are a second-order construct of needs related to self, social and the environment (theory of work adjustment, see Lofquist & Dawis, 1978). Accordingly, Model 4 was developed by adding the items of (a) the prestige factor into the cognitive factor (intrinsic) and (b) the affective factor into the instrumental (extrinsic). Similarly, Model 5 was developed by adding the items of the prestige factor into the cognitive as a means of reflecting the essence of self-needs. The social and environment-related needs were represented by the affective and instrumental factors, respectively. Table 3 illustrates that Model 1-R has the best fit statistics in all absolute and incremental indices. Furthermore, the Akaike’s information criterion, a parsimony fit index, was lower for Model 1-R (AIC = 243.12).

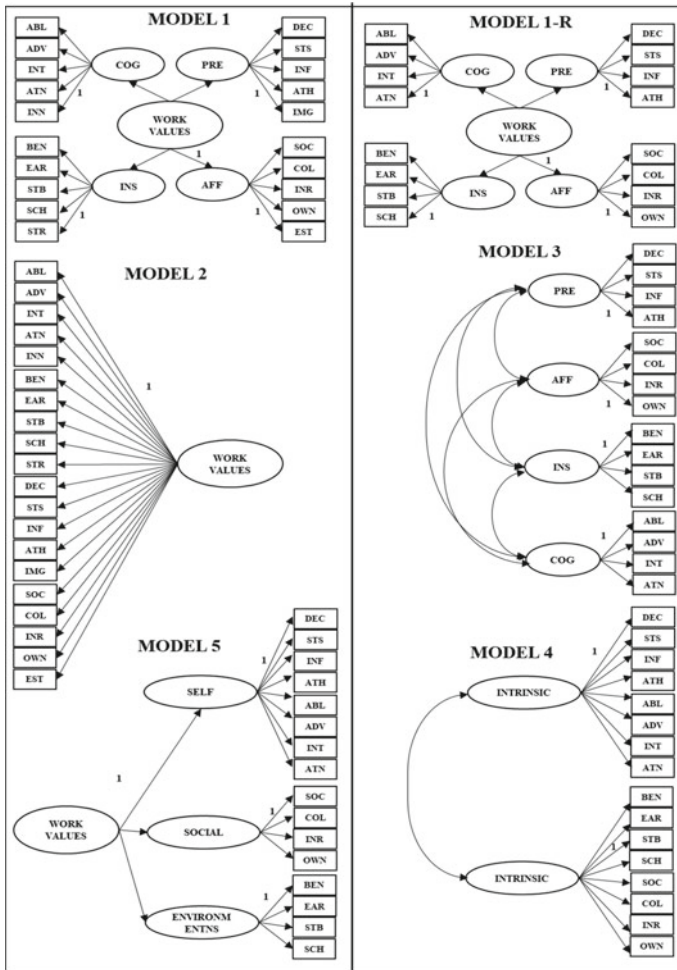


Fig. 1 Competing models of students work values in H&T. *Note* See Table 2 for the explanation of the acronyms

3 Conclusions

As with any research, the potential limitation of our study has to be highlighted. Within the behavioural sciences, “no single measure may be considered perfect or optimal” (Baruch, 2014; p. 16) and our measure of work values is no exception. The 16 items that comprise our conceptualization were proven to be a marginally reliable measure for assessing the construct, and therefore the possibility remains that the domain of work values could be more reliably assessed by a wider set of items. We note that the domain of work includes any work-related outcome that can be

assessed on the basis of their importance to the individual (Elizur, 1984). Therefore, the number of conceivable work value items is virtually limitless. Now that we have demonstrated a representative operationalization of the underlying conceptualization of work values, future studies can incorporate a wider range of items, adding more specific aspects of H&T work to the core elements of the present model. The particular operationalization makes it possible to incorporate an ever-increasing range of items, each of which would be categorized a priori across the four types, creating a more unifying picture of the work values domain within tourism research. However, scholars need to pay attention that in cases of multi-type constructs, it is preferable to have an equal number of items per type (Durvasula et al., 2006). Thus, studies that intend to employ the affective, cognitive, prestige, instrumental typology using a wider range of items may want to avoid the inclusion of more than six items per type.

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Research Trends on Visitor's Intra-attraction Spatiotemporal Behaviour: A Literature Review



Márcio Ribeiro Martins and Elsa Tavares Esteves

Abstract The space–time behaviour of visitor's, when investigated and understood, can provide the development of marketing strategies, better management of tourist attractions and gather information about experiences and emotions experienced in destinations, among others. This study aims to present and discuss the contribution of research on visitors' space–time behaviour at intra-attraction level, stressing some theoretical aspects related to concepts, constructs and methodological options expressed in articles related with this topic published in Scopus database. The search carried out in the Scopus platform reveals a growing interest in the visitors' space–time behaviour in tourism studies. The most productive authors, the most relevant journals and the research areas of published articles were identified. However, few articles specifically focus on visitors' intra-attraction behaviour have been published. A content analysis was performed and the geographic scale of analysis was identified, as well as the methodology used. From the literature review and based on an existing conceptual model for the urban intra-destination context, it was also possible to adapt it to the analysis of the spatiotemporal behaviour of intra-attraction visitors. Analyse visitor's space–time behaviour at intra-attraction level allows facility managers to better understand visitor behaviour in different seasons, improving attractions and the overall tourist experience, contributing to more sustainable facility management.

Keywords Intra-attraction · Theme parks · Visitor spatiotemporal behaviour · Bibliometric analysis

JEL Classification Z32

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383

1 Introduction

In tourism, spatiotemporal behaviour is defined as various attractions that are visited by tourists, in a given geographical space, in order to identify their movements from one attraction to another (Caldeira & Kastenholz, 2022; Xia et al., 2010), and to verify the time of arrival, duration of stay, among others (Tussyadiah & Fesenmaier, 2007). Investigating the spatiotemporal behaviour becomes important regarding the marketing of destinations and attractions, aiming to develop a differentiating and appropriate offer to the various segments in the tourism market (Caldeira, 2014). Information obtained in real time and accurately is a big step for research (Shoval & Ahas, 2016). Researchers, when studying intra-attraction tourist behaviour, focus mostly on small places such as nature parks, theme parks and others.

This study aims to present and discuss the contribution of research on visitors' space-time behaviour at intra-attraction level. As there is no literature review on this topic so far, this article aims to fill this gap through a bibliometric and content analysis, using the Scopus database which has been recognized as the largest abstract and citation database of peer-reviewed literature with a great coverage of tourism journals.

The article is structured in four parts in addition to the introduction. The first part is the literature review with concepts such as visitor's spatiotemporal behaviour and intra-attraction visitor's spatiotemporal behaviour. The second part presents the review methods of the study and the third and fourth parts concern of the results and conclusion, respectively.

2 Visitors' Spatiotemporal Behaviour

According to Caldeira and Kastenholz (2022, p. 196), "spatiotemporal tourist behaviour can be defined as the sequence of attractions visited by tourists within a geographic space and the respective movements between an attraction and another in that geographic space which result in changes of location over time". The research on spatiotemporal behaviour of tourists can be grouped in accordance with the type of mobility, i.e. inter-destination, intra-destination and intra-attraction, the geographical scale (Ferrante et al., 2016), among others. If a researcher is studying tourist movements between different cities is conducting an inter-destination analysis; if the same researcher is studying, the tourist movements in Lisbon are doing an intra-destination analysis; and if the study is conducted in a city zoo, the researcher is doing an intra-attraction analysis.

In recent decades, the interest of researchers in the spatial and temporal behaviour of tourists has increased, especially with the emergence of new technologies that have made it possible to track their movements with great accuracy and detail. Since then, several works have been published. At the inter-destination level, it is possible to highlight the work of Lue et al. (1993), Oppermann (1995) or Tideswell and Faulkner

(1999), but it is the intra-destination level that has aroused the greatest interest of researchers, particularly in urban-scale studies (Caldeira & Kastenholtz, 2018; Li et al., 2019; Martins et al., 2022; Shoval et al., 2015) or in parks and protected areas (Barros et al., 2020; Chhetri, 2015; Li et al., 2019; Stamberger et al., 2018). The intra-attraction mobility has been less studied, not only in indoor attractions, such as museums (Yoshimura et al., 2014) but also in outdoor attractions such as gardens (Zheng et al., 2022), events (Yun & Park, 2014), zoo's (Xu et al., 2020), or theme parks (Birenboim et al., 2013; Huang et al., 2020; Shoval et al., 2009).

Shoval et al. (2009) describe a set of new possibilities and points of view that the use of new technologies brings to the study of visitors' spatiotemporal behaviour, such as the attractions physical carrying capacity estimation; the identification of areas that remain out of the scope of the tourists' routes; and the study of the effect that the time of day, weather, days of the week and the seasons of the year have on visitors.

In general, by understanding the spatiotemporal behaviour of visitors, it will be possible to develop a marketing strategy targeted at more specific segments; it will be possible to regulate the capacity of some tourist sites in a more intelligent way, to improve accommodation services, new attractions and experiences or even improve the relationship between residents and tourists (Shoval & Isaacson, 2007). By understanding how tourists move in time and space, it will also be possible to achieve a more sustainable management of a destination (Caldeira et al., 2021).

2.1 Intra-attraction Visitors' Spatiotemporal Behaviour

Investigating visitor mobility is important not only for the success of theme parks (Huang et al., 2020) but also for the success of other types of outdoor tourism attractions such as zoos, historical gardens, urban parks, among others. Due to their controlled environment and with a controlled flow of visitors arriving and leaving, theme parks or other similar tourism attraction offer a wide variety of points of interest in a relatively small area (Birenboim et al., 2013). However, most published studies are more oriented towards inter-destination (between destinations) or intra-destination (inside same destination) visitor behaviour rather than intra-attraction visitor behaviour. Despite the growing number of articles published on the spatiotemporal behaviour of tourists, there are still some conceptual inconsistencies in the way some researchers define some terms and in the way they are operationalized. Caldeira and Kastenholtz (2020, p. 24) already highlight that there is lack "of systematic and consensual conceptual framework, based on a coherent and comprehensive taxonomy, that allows reliable assessment of the diverse dimensions of tourists' time-space activity".

For instance, Ferrante et al. (2016, p. 3) mention that "tourist mobility can be classified according to several criteria, such as type of mobility analysed (inter-destination, intra-destination and intra-attraction mobility)". But according to Huang et al. (2020, p. 3) "intra-destination space refers to an enclosed space with defined

boundaries, in which tourist behaviour is much more controllable”, although the latter definition would be more suitable to define intra-attraction. In order to clarify, in this article and according to Caldeira and Kastenholtz (2020, p. 31–32), intra-destination tourist movements “correspond to the spatial changes resulting from the tourists’ trajectories from accommodation units to locations of interest and from one location of interest to another” and “intra-attraction space is an enclosed space with defined boundaries, in which tourist behaviour is much more controllable” (Xiao-Ting & Bi-Hu, 2012, p. 628).

The technological advances have also facilitated the emergence and progressive application of a varied set of tracking techniques that have made it possible to collect high-resolution geo-referenced information about visitor movements (Martins & Costa, 2022). Using Geographic Information Systems (GIS) environment, the researcher can explore and interpret increasingly large and complex databases and thus understand movement patterns in a space–time perspective. In the PortAventura park, Spain, Birenboim et al. (2013) used GPS devices and questionnaires and detected a high demand for certain types of activities at certain times (walks in the morning and early afternoon, restaurants and shops in the late afternoon and evening). In the Ocean Park, Hong Kong, Huang et al. (2020) used geo-referenced data from visitor movements to classify them according to their temporal and spatial behaviour characteristics.

3 Review Methods

Having defined the objective of this article, it was conducted a search on the Scopus database because it has been recognized as the largest abstract and citation database of peer-reviewed literature, “[offering] a more comprehensive view of scientific production worldwide in the areas of science, technology, medicine, social sciences, Arts and Humanities” (Elsevier, 2014), and has greater coverage of tourism journals.

The search and code scheme used was [tourism AND “space–time behaviour” OR “spatial–temporal” OR “spatiotemporal” AND attractions OR intra-attraction OR park OR “theme park” OR event]. Data collection was carried out on 29 April 2023 and considered all documents published up to the search date. During the first phase, all indexed documents were taken into consideration ($n = 123$), a quantitative and descriptive analysis was carried out regarding the number of documents published per year, the identification of the most representative journals and authors and the respective countries of institution affiliation. All documents that were not written in English ($n = 12$), and all books’ series, Conference Papers, Book Chapters, Conference Reviews or Reviews ($n = 28$) were subsequently excluded, as it was considered that the articles that have been published are representative of the knowledge produced on visitors’ intra-attraction space–time behaviour in tourism.

The literature review was based in the 83 selected scientific articles. A content analysis was also conducted, and bibliometric methods were used—co-occurrence analysis—allowing a systematic, transparent and reproducible review process

(Zupic & Čater, 2015). The keyword co-occurrence map “the number of times one keyword appears in close relation with another within the publications in the dataset” (Agapito, 2020, p. 6) allows to scrutinize the “themes and their relations that represent the conceptual space of a field” (Koseoglu et al., 2016, p. 183 cit. Agapito, 2020). The bibliometric analysis was carried out with the VOSviewer software.

4 Results

4.1 First Stage–Quantitative and Bibliometric Analysis

The majority of the articles were published in the subject area of Social Sciences ($n = 39$), Environmental Science ($n = 38$) and Business, Management and Accounting ($n = 29$). The Agricultural and Biological Sciences ($n = 14$), Computer Science ($n = 13$) and Earth and Planetary Sciences ($n = 9$) are also important subject areas. The evolution of scientific production was carried out using the number of publications per year (Fig. 1). The oldest publication dates from 2011, however, it is only since 2019 that there has been an increase in the number of annual publications on the topic under analysis.

In terms of scientific journals, most of the documents are spread across a large number of journals. However, Tourism Management with 6 documents, Sustainability Switzerland with 5 and Asia Pacific Journal of Tourism Research with 3 articles are the journals with the most publications.

A large increase in the number of publications can be observed since 2019 with China ($n = 42$), United States ($n = 13$) and Australia ($n = 7$) leading the countries ranking with more published documents. The researchers with the most published articles are: Cong, L., Wall, G., Waal, G., Xu, D., and Zhang, J. with 2 documents each.

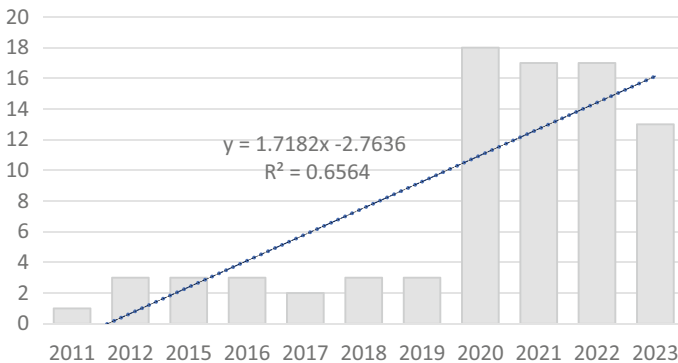


Fig. 1 Number of publications by year. Source Authors construction

Table 1 presents the ten most cited articles on the research topic. However, only 1 document describes a research on the specific topic of visitors' intra-attraction space–time behaviour (e.g. Xiao-Ting & Bi-Hu, 2012). The most cited article was written by Chua A., Servillo L., Marcheggiani E., Moere A. V. (2016), where the authors describe the use of geotagged social media data from Twitter to characterize spatial, temporal and demographic features of tourist flows in Cilento, Italy.

After quantitative analysis, VOSviewer software was used to identify the themes and their relations that represent the conceptual space of a field (Koseoglu et al., 2019). Figure 2 reflects this analysis considering minimum number of occurrences of a keyword is 3. Of the 971 keywords, 62 meet the threshold.

This co-occurrence network consists of 6 clusters and “the more a cluster is in the centre of the map, the stronger the relationship between the keywords that form it” (Serrano et al., 2019, p. 13). The keywords with more occurrences are: spatiotemporal analysis ($n = 31$); tourism and China with 21 occurrences each; and sustainable development and tourist attraction with 13 occurrences each. These keywords are also those with the biggest strength link.

The situation of red cluster in the centre of network map highlights the “spatiotemporal analysis” keyword, an intertwined and widespread topic among the analysed publications. This is also the most significant cluster where we can find some of the seminal works on the theme park visitors' space–time behaviour (e.g. Xiao-Ting & Bi-Hu, 2012). The green highlights the works on “tourist attraction” and ecotourism resorting on biodiversity or coastal zone topics but with no focus on visitors' intra-attraction behaviour.

The blue cluster focuses on research carried out in China using GPS technology to track visitors (e.g. Yao et al., 2021 or Xu et al., 2020). In the yellow cluster, the main keywords are related with the use of big data in tourism research where due to the large amount of data, it is necessary to use “data mining” analysis. However, the analysis of the spatiotemporal behaviour of visitors at the intra-attraction level has not been used yet, and only the work of Yao et al. (2021) has employed GPS tracking data uploaded by tourists in the websites 2bulu.com and fooodoo.com concluding that the season does not significantly affect tourist's behaviour in Yuanmingyuan Park, Beijing.

The purple cluster highlights the research on visitors' spatiotemporal analysis in tourist destinations with focus on tourism development, tourism management or outdoor recreation in United States. The light blue cluster is the smallest and includes research on sustainable development carried out in national parks (Hardy & Aryal, 2020).

In the temporal map (Fig. 3), it is possible to identify the emergent research topics, which are related with the use of big data obtained in social network to analyse the mobility and spatial distribution of visitors (e.g. D. Li et al., 2020, who analyse the spatial and temporal distribution characteristics of tourist flow in scenic spots; and Zheng et al. (2022) who explore the spatial–temporal behaviour patterns of tourists in the Zhongshan Botanical Garden, China). The most relevant research areas are Beijing, China.

Table 1 Most cited articles

Year	Document title	Authors	Journal title	2013–2017	2018–2022	2023	Total
				59	981	183	1223
2016	Mapping Cilento: Using geotagged social media data to characterize tourist flows in southern Italy	Chua A., Servillo L., Marcheggiani E., Moore A. V	Tourism management	7	138	7	152
2018	Real-Time Measurement of Tourists' Objective and Subjective Emotions in Time and Space	Shoval N., Schvimer Y., Tamir M	Journal of Travel Research	0	87	11	98
2015	A spatial-temporal analysis of hotels in urban tourism destination	Li M., Fang L., Huang X., Goh C	International Journal of Hospitality Management	11	59	7	77
2020	Exploring spatio-temporal changes of city inbound tourism flow: The case of Shanghai, China	Mou N., Yuan R., Yang T., Zhang H., Tang J., Makkonen T	Tourism Management	0	59	16	75
2012	Intra-attraction Tourist Spatial-Temporal Behaviour Patterns	Xiao-Ting H., Bi-Hu W	Tourism Geographies	21	49	5	75
2018	Temporal and spatiotemporal investigation of tourist attraction visit sentiment on Twitter	Padilla J. J., Kawak H., Lynch C. J., Gore R. J., Diallo S. Y	PLoS ONE	0	69	4	73
2017	Extraction and analysis of city's tourism districts based on social media data	Shao H., Zhang Y., Li W	Computers, Environment and Urban Systems	2	43	6	51

(continued)

Table 1 (continued)

Year	Document title	Authors	Journal title	2013–2017		2018–2022		2023		Total
2017	A novel popular tourist attraction discovering approach based on geo-tagged social media big data	Peng X., Huang Z	ISPRS International Journal of Geo-Information	0	46	981	4	183	1223	50
2015	Using residents' perceptions research to inform planning and management for sustainable tourism: a study of the Gold Coast Schoolies Week, a contentious tourism event	Lawton L. J., Weaver D. B	Journal of Sustainable Tourism	8	33		4			45
2015	Assessing groundwater recharge in an Andean closed basin using isotopic characterization and a rainfall-runoff model: Salar del Huasco basin, Chile	Uribe J., Munoz J. F., Gironas J., Oyarzun R., Aguirre E., Aravena R.	Hydrogeology Journal	6	28		2			36

Source Scopus (2023); authors construction

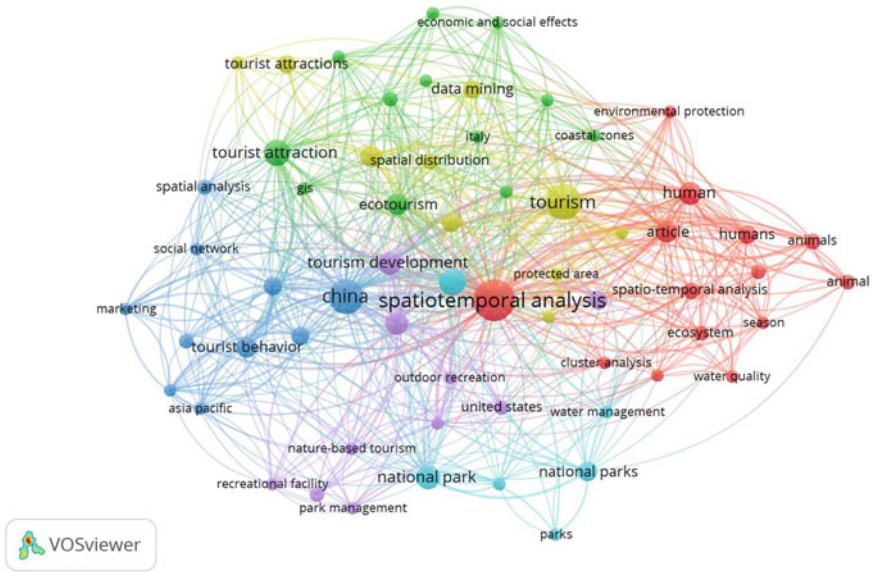


Fig. 2 Co-occurrence all keywords. Source Authors construction

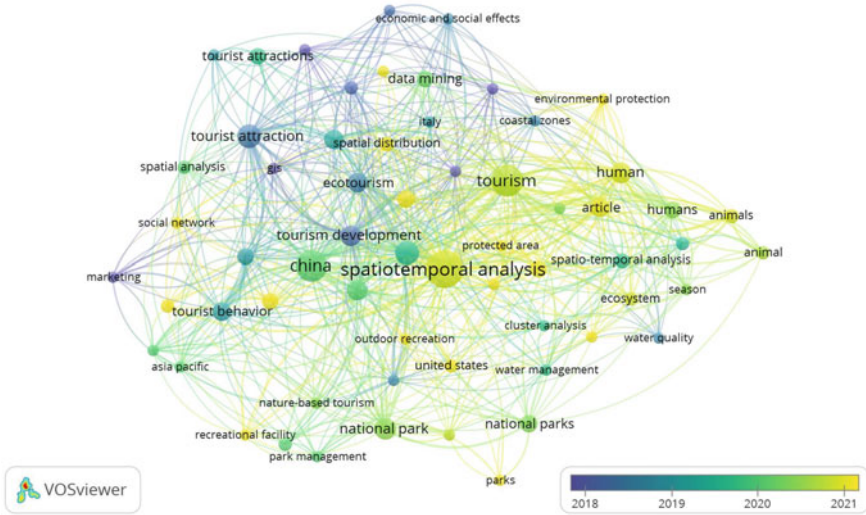


Fig. 3 Temporal co-occurrence all key words. Source Authors construction

4.2 Second Stage–Content Analysis

For the content analysis, the articles extracted from the Scopus database were then exported to the Mendeley software. After reading the titles, abstracts and the section dedicated to the methodology, the authors selected all the documents with focus on visitors’ space–time behaviour at intra-attractions. At this stage, only 4 articles were identified (Xiao-Ting & Bi-Hu, 2012; Xu et al., 2020; Yao et al., 2021; Zheng et al., 2022), revealing the existence of very few articles published on this specific topic (Table 2). However, a careful reading of these articles has allowed the identification of an additional 5 scientific articles considered relevant for this study and included in the content analysis. Articles on the intra-attraction analysis of visitors spatiotemporal behaviour published in peer-reviewed journals are described in Table 3.

With the exception of the works developed by Birenboim et al. (2015), Birenboim et al. (2013) and East et al. (2017), all were carried out in China and Hong Kong

Table 2 Research contributions of intra-attraction visitors’ spatiotemporal behaviour

Contributions	Authors
To detect visitors’ demographic characteristics, emotional states and consumption preferences	Huang et al. (2020)
To help park managers to efficiently respond to untapped demand through a more flexible level of service	Birenboim et al. (2013), Xiao-Ting and Bi-Hu (2012)
To improve visitor experience	Birenboim et al. (2013), Xiao-Ting and Bi-Hu (2012)
To give inputs to attraction planning and management, such as location of service, guide identification system and intra-attraction transportations, among others	East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Yao et al. (2021), Zheng et al. (2022)
To manage congestion and crowding and control visitors flow	East et al. (2017), Huang et al. (2020), Xu et al. (2020), Yao et al. (2021), Zheng et al. (2022)
To contribute to park upgrading	East et al. (2017), Huang et al. (2020), Xu et al. (2020), Yao et al. (2021), Zheng et al. (2022)
To better understand tourist activities and demand among attractions	Xiao-Ting and Bi-Hu (2012)
To give a real-time support for park managers to improve park operation	Huang et al. (2020)
To reduce the waiting time of venues, facilities, games and transportation	Huang et al. (2020)
To identify the areas of real interest to tourists (that may not be the areas with the highest number of trips made by tourists)	Yao et al. (2021)
To provide different tourism route planning to tourists	Zheng et al. (2022)

Source Authors construction

Table 3 Articles on the intra-attraction analysis of visitors spatiotemporal behaviour published in peer-reviewed journals

Authors	Attractions	Aims	Methodology	Conclusions
Zheng et al. (2022)	Zhongshan Botanical Garden, China	To discover tourist behavioural characteristics and demographics; visually depict the spatiotemporal behaviour patterns of tourists; provide planning strategies for smart scenic spots	GPS data; survey ($n = 220$); K-means clustering algorithm and square sum error (SSE)	According to tourists' preferences and social attributes, three types of spatiotemporal behaviour patterns were identified: recreation, birdwatching and photography, and learning
Yao et al. (2021)	Yuanmingyuan Park, Beijing	To identify intra-attraction tourist behaviour characteristics; to understand the relationship between tourists' visit path, dwell time and taking pictures, and test whether there are differences in tourist behaviour in different seasons	GPS tracking data uploaded by tourists in the websites 2bulu.com and fo0000ot.com ($n = 906$); GIS; ANOVA	Dwell time could explain the relationship between tourist stay behaviour and tourist photo behaviour. The season does not significantly affect tourist's behaviour
Huang et al. (2020)	Ocean Park, Hong Kong	To explore tourist spatial-temporal behaviour patterns in a micro-scale destination, using a multi-source data	GPS digital tracking device; Questionnaire ($n = 474$); GIS; Cluster analysis; ANOVA	Participants were clustered in three categories according to their shape length, time, area and perimeter. With the combination of statistical clustering with GIS visualization, behaviour patterns can be delineated more precisely

(continued)

Table 3 (continued)

Authors	Attractions	Aims	Methodology	Conclusions
Xu et al. (2020)	Zoo, Beijing	To identify tourists' spatiotemporal behaviour; Portray Chinese tourists' spatiotemporal behaviour patterns through GPS data and ArcGIS; explore the elements that affect tourists' spatial decisions	GPS digital tracking device; Questionnaire ($n = 287$); Geographic Information System (GIS); K-means clustering algorithm	Seven spatiotemporal patterns of behaviour were identified; non-local tourists prefer full tour of the zoo; locals usually visit part of the zoo—except for panda fans; the attributes of animals are more influential on visitors' spatiotemporal behaviour
East et al. (2017)	Marwell Zoo, UK	To discover whether different types of visitors behaved differently when exploring Marwell Zoo	GPS digital tracking device; Questionnaire ($n = 931$); Mann–Whitney U test; Gaussian boosted regression tree (BRT) model, fitted using the R package gbm 2.1.1	The majority of visitors followed similar routes revealing a strong 'main path inertia' with over half missing exhibits away from the perceived main route. Different group types varied in how long they dwelt at different locations and in how long they spent at the attraction altogether
Zheng et al. (2017)	Summer Palace, Beijing	To accurately predict the tourist's next location within a given attraction	GPS tracking devices; questionnaire ($n = 111$); Heuristic prediction algorithm (HPA)	Contribute to enhancing the level of personalized location-based service, tourist attraction administration, and real-time crowd control

(continued)

Table 3 (continued)

Authors	Attractions	Aims	Methodology	Conclusions
Birenboim et al. (2015)	Zoo, Aalborg	To understand the distribution of visitors' subjective experiences within the zoo	GPS tracking device; GSM (global system for mobile communications); SMS messages ($n = 1041$); Questionnaire ($n = 150$)	The quality of experience of visitors varies both in time and in space. The experience and satisfaction in a zoo are influenced by the type of animal that is observed, the physical characteristics of exhibitions, and the type of interaction with the animals
Birenboim et al. (2013)	PortAventura, Barcelona	To track and record the time-space trajectories of visitors	Questionnaire; GPS digital tracking device ($n = 276$ families with at least one child under 11); GIS;	Visitors demonstrate different diurnal and intradiurnal mass behaviour patterns or rhythms of activity. Temporal activity patterns are more likely to repeat in other environments
Xiao-Ting and Bi-Hu (2012)	Summer Palace, Beijing	To identify intra-attraction tourist temporal-spatial behaviour patterns	Time-space activity diaries; Questionnaire ($n = 1027$); Cluster analysis; K-means clustering	Seven clusters of spatiotemporal behaviour patterns were identified; temporal behaviour factors made the largest contribution to the clustering analysis

Source: Author's construction

and the vast majority used modern tracking techniques to track visitors, using GPS devices and user generated content, i.e. GPS tracking data uploaded by tourists in the websites. To identify intra-attraction tourist spatiotemporal behaviour patterns in the Summer Palace, Beijing, Zheng et al. (2017) used GPS devices and Xiao-Ting and Bi-Hu (2012) made use of time–space activity diaries, described in literature as a traditional technique. Despite the existence of a wide variety of intra-attraction outdoor destinations, studies have focused on three Zoos (Birenboim et al., 2015; East et al., 2017; Xu et al., 2020), two theme parks (Birenboim et al., 2013; Huang et al., 2020) and three gardens (Xiao-Ting & Bi-Hu, 2012; Yao et al., 2021; Zheng et al., 2017, 2022).

From a methodological perspective, it is worth highlighting the work of Yao et al. (2021) because they try to understand the relationship between tourists' visit path, dwell time, taking pictures and the differences in tourist behaviour in different seasons; and the work of Birenboim et al. (2015) due to the focus in the understanding of the distribution of visitors' subjective experiences. Xu et al. (2020) also explore the elements that affect tourists' spatial decisions when visiting the Beijing Zoo and Birenboim et al. (2013) highlight the time–space trajectories of PortAventura Park visitors. Zheng et al. (2017) conducted a very innovative study predicting the tourist's next location in Summer Palace (Beijing).

All the investigations presented in Table 3 have made relevant contributions to the understanding of intra-attraction visitor behaviour. East et al. (2017) found that group type, travel distance, number of previous visits and group size were the major factors in determining how long people stayed in Marwell Zoo; and the number of previous visits, travel distance, membership and household income had the largest effect on how long participants spent interacting with animals. However, Xu et al. (2020) demonstrate that the attributes of the animals in a Beijing Zoo are more influential on visitors' spatiotemporal behaviour than the other factors that were explored. During the visits, the larger groups spending more time in the park than smaller ones (East et al., 2017) and there was a tendency for the majority of guests to follow the same route around the zoo. Groups with children spent less time attending to the animals and more time at non-animal locations than those without. Less frequent and first time visitors were also prepared to spend longer engaging with animals (East et al., 2017). Xu et al. (2020) conducted also a study in a zoo in Beijing and they found that local residents visit only part of the site and non-local tourists prefer a full tour of the zoo.

Birenboim et al. (2015) highlight that visitors' experiences in Aalborg Zoo are dynamic and tend to become more positive as the visit goes by and their experience and satisfaction are influenced by the type of animal that is observed, the physical characteristics of exhibitions and the type of interaction with the animals.

Theme parks visitors' space–time behaviour was analysed by Birenboim et al. (2013) and Huang et al. (2020). In PortAventura Park, Birenboim et al. (2013) made a distinction between low and high-season results, because the two periods differ in their opening hours, concluding that Spanish visitors had the longest visits in the park compared with other nationalities and that visitors spend only less than 40% of their time in the main sites of the park. In Ocean Park, Hong Kong, Huang et al. (2020)

made a Cluster analysis based in length, time, area and perimeter, identifying three spatial–temporal behaviour patterns. Differences in demographic and in emotional and consumer behaviour characteristics were also found.

Zheng et al. (2022) mention that tourists space–time behaviour in botanical gardens can be divided into recreation, birdwatching and photography and learning activities. In their study, they identified three tourist spatiotemporal behaviour patterns. Yao et al. (2021) found in their research in Yuanmingyuan Park (Beijing) that dwell time could explain the relationship between tourist stay behaviour and tourist photo behaviour. Besides that, they found that the season does not significantly affect tourist's behaviour.

All articles used quantitative methods to analyse the collected data, namely cluster analysis using K-means clustering algorithm (Xiao-Ting & Bi-Hu, 2012; Xu et al., 2020; Zheng et al., 2022) and one-way analysis of variance ANOVA (Huang et al., 2020; Yao et al., 2021). To analyse the data space dimension, most of the authors used Geographic Information Systems (GIS) software to produce thematic maps related with visitor movements intensity or visitors' hotspots or coldspots, among others.

All researches aimed to identify and analyse intra-attraction tourist behaviour, however, some of them do not reveal how they operationalized the concept of tourist, collecting data from visitors without revealing how they differentiate day visitors from tourists.

In an urban intra-destination context, Caldeira and Kastenholz (2020, p. 22) have already mentioned that “the incipient conceptualization of spatiotemporal tourist behaviour leads to the present inconsistency of assessment indicators used in empirical research”. The content analysis of the published works on the spatiotemporal behaviour of visitors at the intra-attraction level also led to the conclusion that there is no conceptual model that could help researchers exploring visitors' spatiotemporal behaviour at the intra-attraction level. Using Caldeira and Kastenholz (2020) framework, all the variables used in the content analysis of selected articles were identified and organized in Table 4.

All most researches give important recommendations to attraction managers (Table 2) in order to manage congestion and crowding, controlling visitors flow (East et al., 2017; Huang et al., 2020; Xu et al., 2020; Yao et al., 2021; Zheng et al., 2022) or to provide planning strategies, as done by Zheng et al. (2022) with their recommendations for smart scenic spots in Zhongshan Botanical Garden.

5 Conclusion

The competitiveness of destinations and territories attractions requires understanding visitor behaviour and preferences, as well as the spatial and temporal behaviour that will allow more efficient decision-making regarding the intra-attractions of a space. To answer the study's objective–present and discuss the contribution of research on visitor's space–time behaviour at intra-attraction level, two analyses were performed.

Table 4 Variables and dimensions used on the intra-attraction analysis of visitors spatiotemporal behaviour

Variables/dimensions	Authors
Visitors	East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2017, 2022)
Socio-demographics	
Age	East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2017, 2022)
Gender	East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2017, 2022)
Education	East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2017)
Occupation	East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2017)
Income	Xiao-Ting and Bi-Hu (2012), Zheng et al. (2022), Zheng et al. (2017)
Nationality	Zheng et al. (2017)
Travel/trip	East et al. (2017), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2017)
Travel/visit group	Birenboim et al. (2013), East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2022), Zheng et al. (2017)
Travel experience/first time/repeated visit	East et al. (2017), Huang et al. (2020)
Motivations	Huang et al. (2020), Xiao-Ting and Bi-Hu (2012) Huang et al. (2020), Xu et al. (2020), Zheng et al. (2017)
Intra-attraction destination	Huang et al. (2020)
Spatial characteristics	
Intra-attraction suitability for visitors	
Facilities	
Movement dimension	East et al. (2017)
Territoriality	Birenboim et al. (2013, 2015), East et al. (2017), Yao et al. (2021), Xiao-Ting and Bi-Hu (2012) Zheng et al. (2017)
Distance walked from the entrance door	Xiao-Ting and Bi-Hu (2012), Zheng et al. (2017)
Location of points of interest (POI)/districts	Yao et al. (2021)
Length of space–time path	Birenboim et al. (2013), East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Yao et al. (2021), Zheng et al. (2022)
Linearity	Yao et al. (2021)
Direction	Birenboim et al. (2013), East et al. (2017), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Yao et al. (2021), Zheng et al. (2022)
Locomotion	Yao et al. (2021)
Time in motion	Birenboim et al. (2013, 2015), Xu et al. (2020), Zheng et al. (2017)
Speed	Birenboim et al. (2015), Xiao-Ting and Bi-Hu (2012), Zheng et al. (2017)
Multi-POI dimension	
Intensity	
Number of visited POI's	Birenboim et al. (2013), East et al. (2017), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2022)
Number of activities performed	Birenboim et al. (2013), Huang et al. (2020), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Yao et al. (2021), Zheng et al. (2022)
Visit duration	Birenboim et al. (2013), East et al. (2017), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2022)
Time spent at POI's (total or %)	Birenboim et al. (2013), East et al. (2017), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2022)
Activity intensity	Birenboim et al. (2013), East et al. (2017), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2022)
Visitation day peaks	Birenboim et al. (2013), East et al. (2017), Xiao-Ting and Bi-Hu (2012), Xu et al. (2020), Zheng et al. (2022)
Specificity	
Visited POI's identification	Zheng et al. (2017), Zheng et al. (2022)
Activities performed	Xu et al. (2020)
Stopping points	Birenboim et al. (2013, 2015), East et al. (2017), Xu et al. (2020), Zheng et al. (2022)
Order of POI's visited	Xiao-Ting and Bi-Hu (2012), Zheng et al. (2022)
Time of the day for visit	Birenboim et al. (2013), East et al. (2017), Xu et al. (2020), Yao et al. (2021) Zheng et al. (2022)
Season of the year/high and low season	Yao et al. (2021), Zheng et al. (2022) Xu et al. (2020), Zheng et al. (2022) Birenboim et al. (2013), Yao et al. (2021)

Source Caldeira and Kastenholz (2020), adapted. Author's construction

In quantitative and bibliometric analysis, we started an analysis in the number of annual publications on the topic under analysis. Since 2019, the number of publications has been an increase and the three scientific journals with the most publications are: (i) *Tourism Management* (6 articles); (ii) *Sustainability Switzerland* (5 articles) and; (iii) *Asia Pacific Journal of Tourism Research* (3 articles). The countries with more published articles are China ($n = 42$), United States ($n = 13$) and Australia ($n = 7$). For bibliometric analysis, VOSviewer software was used to identify the themes and their relations, considering minimum number of occurrences of a keyword is 3. The study identify 62 keywords grouped into 6 clusters. The “spatiotemporal analysis” with 31 occurrences, “tourism” and “China” with 21 occurrences each, is the three more occurrences on the co-occurrence network and are also those with the biggest strength link.

In content analysis, Scopus database was used and the articles extracted were then exported to the Mendeley software. All the documents with focus on visitor's space-time behaviour at intra-attractions were selected. Considering titles, abstracts, aims, methodology and contributions of the studies, 9 articles were analysed. All articles aimed to identify and analyse intra-attraction visitor's spatiotemporal behaviour. The studies give important recommendations to attraction managers, namely controlling visitors flow or to provide planning strategies.

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Increasing Revenue and Decreasing Cost: The Promotion of Direct Distribution Channels in Hospitality



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Abstract The main objective of this research is to analyze the Revenue Management in hotels oriented to the promotion of direct sales channels, in order to increase the revenue of the units and to avoid possible expenses in commissions to third parties by the hotel, namely the indirect sales channels. In this case, the application of the Revenue Management concept is very beneficial in that hotels can apply the proper procedures and strategic decisions to minimize commission costs and generate the optimal amount of revenue, which is the main objective of this study. For this, it will be necessary to develop a concise study, regarding segmentation, and to understand what kind of benefits will be convenient for them, to build direct loyalty without any other intervention. Through a literature review, as a basis of study and the application of a quantitative study, creative proposals for rewards and strategies and suggestions for good practices are formulated to promote direct purchase by consumers and build loyalty so that they always book directly with the hotel unit.

Keywords Direct distribution channels · Brand image · Loyalty · Revenue management

JEL Classification D40 · Z32 · Z33

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1 Introduction

This study aims to analyze Revenue Management in hotels oriented to the promotion of direct sales channels, to avoid unnecessary expenses, namely costs with indirect sales channels, supported, for example, by online travel agencies (OTA), travel agencies and tour operators.

The objective is to understand the procedures and strategies applied, in a real context, to increasing demand through direct channels and which indicators should be applied and analyzed to assess the position of the hotel unit in the market.

This study is supported by the literature review, addressing numerous topics related to the theme in question, such as the importance of revenue management, the process of customer loyalty and retention, the weight of the unit's brand image and the introduction and dynamization of direct distribution channels. This analysis will contribute to the future development of the core question of this study, namely the formulation of creative proposals of rewards and corporate strategies that can make the customer want to book directly with the hotel indefinitely.

In order to analyze the factors presented, the definition of the segments is extremely important, as it allows the unit to adjust its offer in order to meet the customer's needs in the best way. To complement this study, we present a quantitative applied study, the analysis of the results obtained and the respective conclusions of the study.

A questionnaire was developed on the subject in question, whose objective is to understand the customer's perspective regarding the choice of distribution channel during their purchase process and to understand their motivations for making their reservation directly with the hotel establishment. Based on this analysis and consequent results, the main objective of the study is focused on the creation of tools and resources that help unit managers in their decision making and strategies to apply, thus promoting revenue maximization in a hotel establishment.

2 Literature Review

2.1 Revenue Management

Revenue Management (RM) is a management concept, characterized by being a tool that contains an information database with future forecasts of possible trends, to determine the opportune price for a given season, with the appropriate offer, aimed at a certain segment, according to the current needs of the establishment and consequently, maximize its revenue (Phumchusri & Maneesophon, 2014). This concept has as main objective to predict and manage a possible demand, to estimate an optimal price through pricing techniques and create an estimate of revenue resulting from the process (Vives et al., 2018).

Demand is a phenomenon considered dependent on numerous external factors that may impact management decisions, such as the presence of substitute products

and the existence of competition in the market (Vives et al., 2018). It is necessary to predict and persuade customer demand, and the establishment can profit even more than it was supposed to, in a certain period, if these studies are applied. This type of theory advocates a dynamic management style, prepared to deal with any type of setback that may arise. Thus, the concept of “Yield Management” (YM) emerged in the late 1970s, when airlines put aside the theory of fixed prices and began to adopt strategies to occupy the empty seats of the plane, through the application of discounts and promotions.

According to Bastos (2022), a hotel unit that does not apply RM techniques in its management becomes less effective, since it becomes almost impossible to forecast demand, price, inventories, among other fundamental factors for the management of a unit. It is necessary to take into account the fact that customers sometimes do not understand the price that is being charged, resulting from applied RM techniques and tools. Some consumers may begin to doubt and make comparisons with the rest of the market, to try to understand whether they will be harmed by choosing our service and because of the stipulated value (Anderson & Xie, 2010).

Ibrahim et al. (2022) argue that the application of RM tools may vary from hotel to hotel depending on their business needs. While one hotel may forecast room availability through a daily forecasting routine, other hotels may rely on other factors to forecast room availability, such as occupancy rates, average lengths of stay and inventory allocation, called the multiple forecasting technique. These authors also argue that the effectiveness of Revenue Management in a hotel unit will depend on the performance and actions of the department in question, determining the positive performance of the tool and consequent results. On the other hand, the study by Matsuoka (2022) argues that it is possible to balance a high occupancy rate in the presence of higher prices and consumer satisfaction through Revenue Management. One variable may moderate the effect of the other, that is, a higher occupancy rate results from a greater effort on the part of employees to provide quality service to a larger audience in the usual time frame, which will result in a greater effort and a consequent higher price for the service.

2.2 Customer Loyalty

Customer retention is the best strategy within a company to maximize its revenue in the long run and make the business sustainable. It is possible to develop numerous methods of analyzing customer loyalty in companies, through the entire history of the customer, so that it is studied in detail and thus, companies can be aware of their needs throughout their stay (Lentz et al., 2022).

On the other hand, other studies indicate that there are more important things than loyalty programs, such as the characteristics of the product we are exposing in the market, the existence of positive feedback from the experience, its location, or even its physical appearance (Berezan et al., 2015).

Relationship marketing is an aspect of the sector that emphasizes customer retention and satisfaction, where frequency programs are used, that is, programs that capture the times the customer repeats the purchase and their behaviors prior to it (Lentz et al., 2022).

A loyal customer will not only contribute to the increase in revenue of the establishment but will also recommend the experience to a neighbor. If there is an emotional connection between the customer and the brand, loyalty is considered even stronger, and in moments of weakness on the part of the brand, the customer is less likely to be disappointed with the error (Lentz et al., 2022).

Lien et al. (2015) indicate that one of the factors that will determine the success of a brand associated with the product is the growth and investment of consumer confidence.

According to previous studies, Koo et al. (2020) argue that retaining a new customer is more expensive than retaining an existing customer. These types of factors should be properly analyzed due to the high costs of loyalty programs. Koo et al. (2020) claim that the loyal customer expects much more from the services provided. That is, the customer does not just want free Wi-Fi, a free upgrade, access to a lounge space or discounts at the hotel restaurant. The customer wants a unique experience, with exclusive and quality services deserved through the perks of the unit's loyalty program, namely, at an "elite level" stage, that is, when the customer has already accumulated a series of points through his/her stays and wants to use those same points to pay for services or even stays in exchange for money. The main benefits of investing in customer retention are based on reducing marketing costs and better studying the needs and desires of the market.

To Sekulić and Mandarić (2017), if the customer returns to the establishment and repeats the purchase, it means that the investment in customer retention has been successful. A customer who is treated well by the property, who has been given a loyalty card or other inherent benefits, will more readily book through direct channels, benefiting not only their relationship with the property, but also the hotel's revenue.

2.3 Brand Image

Brand image has begun to have a significant impact on the reputation and credibility of the company, allowing its development and long-term sustainability. El-Said (2020) argues that if consumers recognize the brand, they will be less concerned about the price due to the affection created with it. Price perceptions may also influence the purchase since high price is usually associated with high product quality and consequently with a brand.

Lien et al. (2015) argue that the price of a product will influence the consumer's purchase process, since price sometimes attributes greater value or quality to the product from the consumer's perspective. Consumer recognition of a brand has several benefits, namely that it can minimize the consequences of negative reviews.

On the other hand, when it comes to unbranded products, consumers will already pay special attention to reviews of the product, as it is an unknown element.

Nuseir (2021) defends that once brand loyalty has been achieved, it will be almost impossible for the customer to replace it with another, resulting in greater profitability for the hotel in the long run.

Companies use positioning strategies to convey their identity to customers and implement a position in the market, which can also eventually lead to brand loyalty (Akbari et al., 2021).

According to studies by Nuseir (2021), brand image is considered an extremely important topic, given the existing difficulty in all businesses when it comes to retaining present consumers, something that the effect of brand image can immediately facilitate.

Brand image can fulfill a consumer's needs for social, sentimental, ideal identity, status and symbolic value. Customers can gain psychological satisfaction from a brand and the resulting positive experiences, new network of contacts and a good relationship with employees. The creation of sentimental value with the brand is developed from a need for emotional sustenance by an individual who is experiencing different experiences in their life (Yang & Galak, 2015).

In short, as a rule, consumers do not mind paying more to enjoy a particular brand; however, when it comes to products not associated with any specific brand, the price of the product will be taken more in consideration.

2.4 Direct Distribution Channels

A distribution channel is an intermediary that consumers use to communicate with the brand to facilitate the transaction between them, directly or indirectly, thus making their products and services available more effectively. Distribution channels are managed by the hotel team to ensure effective and continuous contact with the customer. Indirect distribution channels are intermediaries that establishments use to sell their product or service to the customer, guaranteeing all the processing of the reservation, as is the case with Online Travel Agencies (OTA). They are usually companies that buy in large quantities and resell directly to the final consumer.

It is mandatory that the establishment considers whether the channel used will be the best to provide the defined segmentation, depending on its positioning in the market, since the costs associated with them are quite high, due to the sales commissions established between the agent and the establishment. Direct distribution channels are based on immediate contact between the customer and the establishment, without the use of any intermediary, namely the reservation department, its website or even the purchase made directly with the unit's reservation department.

When positioning in the market, all hotels must have a balance between direct and indirect distribution channels, considering that directly, the hotels must apply the proper procedures and strategic decisions, and there will be a minimization of costs in commissions from indirect channels.

OTA can be considered one of the main means of booking, given their great growth in recent years, due to the receptivity on their websites full of information, not only of a particular hotel, but of several other elements, such as their loyalty campaigns, which makes it more exclusive and conducive to retaining customers. Customers, being more and more demanding, start comparing the cost benefit of each distribution channel, and the hotel establishment will have to stand out from the other means, to start benefiting equally by direct means. It is more difficult to retain customers who are already loyal to the OTA, even if they are receiving offers from the direct medium that can benefit them more, that is, since they already have a high number of scores in the online booking agent, which provides them with consecutive discounts on these platforms, customers do not want to be receiving more spam from other channels that is making them another type of offer, ending up being retained indefinitely only in an online channel.

Raad et al. (2023) argue that businesses have less control over the fees and information made available to the consumer when they use intermediaries to sell their product. Their research emphasizes that establishments should only invest in intermediaries or any type of indirect distribution channel when necessary or when they are small businesses.

While indirect distribution channels represent a source of exposure for our product and can attract even more consumers, it can affect the profit share of hotels due to the commissions paid to them.

The objective of any hotel establishment is to promote its direct booking channels in order to minimize its distribution costs, avoid paying commissions to intermediaries and regain its power over rates and its market.

3 Methodology

The research presents a quantitative methodology, where a questionnaire was applied to understand the customer's perspective regarding the choice of distribution channel during their purchase process and to understand their motivations for making their reservation directly with the hotel establishment. Based on this analysis and consequent results, the main objective focuses on the creation of tools and resources that help the unit managers in their decision making and which strategies to apply, thus promoting the maximization of revenue in the establishment. It presents some specific objectives, namely: (1) to understand the importance and weight that the attribution of exclusive offers and discounts has for the purchase process; (2) to prepare the information to, in the future, present good practices to increase the direct sales of a unit, aiming at increasing the unit's revenue. To deepen this study, some questions were developed to integrate a questionnaire, with the purpose of analyzing the customer's perspective during his/her purchase process and the choice of the distribution channel when making his/her reservation, thus understanding which are the most effective methods to convince him/her to book directly with the unit, through a deeper interpretation of his/her needs as a guest.

Regarding the population, sample and sampling technique, the universe of this study is characterized by the entire population that may potentially be interested in using hotel services, namely those seeking accommodation for work or leisure reasons. Thus, after defining the study sample, a questionnaire was disseminated to all potential customers. Thus, the population was all those interested in hotel services, for work or leisure reasons, thus making it a quantitative type of study, and the method of data collection by online questionnaire.

All the questions presented in the questionnaire were based on the literature review, divided into the following themes: (1) Distribution channel preference during the purchase process; (2) Knowledge of Direct Distribution Channels; (3) Security in Distribution Channels; (4) Loyalty during the purchase process; (5) Customer purchase process; (6) The influence of perceived benefits; (7) The weight and influence of Brand Image; and (8) Commissions charged.

This study allowed for a careful analysis of the different areas of interest related to the themes to facilitate the understanding and analysis of the results, thus contributing to obtain relevant conclusions for the present study.

4 Results

The questionnaire of this study was available on the platform for 1 month, its first date of dissemination was on May 10, 2023 and ended on June 10, 2023, and at the end of the process, 228 responses were collected in their entirety. It was mainly publicized through two social networks, Facebook and LinkedIn, as previously stated, sufficient to provide a very positive number of participants in the study. The questionnaire initially presents a brief explanation of the study topic, so that participants have an idea of why it was developed and expect a type of question accordingly. Regarding the Sociodemographic Analysis, and concerning the age group, the data collected indicate a predominance of participants in the age group of 24–29 years of age, with a percentage of responses of 29.8%. The age group with the lowest incidence is in the respondents over 65 years old.

Regarding gender, the data collected indicate a percentage of 65.8% female and 34.2% male. Observing the educational qualifications, the results show that the majority of participants have a degree, representing 47.1% of the responses in their entirety.

It should be noted that 21.1% already have a master's degree and a small percentage already have a PhD. With regard to marital status, the highest percentage was single, with a percentage of 32.9%. However, 57.9% were married or engaged, with a low percentage of widowed and divorced, which may explain why most participants prefer to travel as a family/couple.

Most participants are employed, corresponding to a response percentage of 69.7%. As for net monthly income, the option of 900 and 1200 € presented a rate of 26.1%, representing the majority. The percentage of 18.8% with incomes below 750 euros stands out negatively. Most participants are Portuguese nationals with 223 responses,

with a significant number of residents in Viseu (127 responses), Porto (46 responses) and Vila Nova de Gaia (25 responses).

Regarding the tourist profile, the preferred type of tourism continues to be “*Sun and Beach*” representing 84.2% of the total. In the second place, with 45.2% of the responses, “*Cultural Tourism*,” and the majority prefer traveling as a family, representing 54.8% of the total and 46.1% as a couple. This crosses with the sociodemographic information where 57.9% of the sample were committed or married.

About holiday spending, we observe that the majority of participants, corresponding to 37.4% of the responses, spend more than €900 annually.

Finally, we can observe that the determining factors during the process of choosing the hotel establishment for their trips are mostly based on the quality/price ratio, with 94.3% of the responses. In the second place, with 68.9% of the responses, are the hotel’s location and access. The price factor occupies the third position, with 24.1% of the answers.

Concerning Distribution Channel Preference, the results show that participants have different approaches and considerations when choosing the Distribution Channel during their purchase process. Regarding the first question, 80.3% of the participants stated that the first research they perform during their purchase process is done on online travel agencies, such as Booking and Expedia. However, when booking directly with the hotel, 52.2% of the participants indicated that they prefer to use the hotel’s own website. Regarding the rates presented in the distribution channels, 45.1% of the participants consider that they will find lower prices on online travel agencies; however, 33.5% of the participants consider that they will find lower prices on the official website of the unit. When analyzing the access to exclusive offers and discounts, 45.7% of participants (104 people) believe that they will have more exclusive offers if they book through online travel agencies; however, 40.5% of participants (91 people) consider that they will have access to more perks if they book directly with the hotel.

Regarding the open questions, the first question addressed the factors that would lead participants to choose the hotel directly as their first booking method. Some 62.8% of participants (142 people) voted for the option of a meal included in the stay, 43.6% (99 people) favored the option of discounts at local tourist sites and restaurants included in the stay, while 41% (93 people) opted for a spa service included in the stay.

The second question was open-ended, meaning that participants could answer freely according to their opinion, and asked about the main advantages of booking directly with the official website of the unit. Most of the answers were based on the fact that the prices presented are lower (76), the existence of more discounts and other types of perks, greater security during the booking procedure, information considered more reliable and greater ease in the whole process. The third question, also open-ended, asked participants about the main advantages of booking with online travel agencies. Most answers were based on the fact that there was a greater diversity of choice on the platforms and a greater term of comparison of both prices and hotel units, as well as the exclusive perks they received by being loyal to these online

agencies. A large number of responses were also based on finding lower rates on these platforms.

Participants were also asked to give suggestions on how to increase direct sales in hotels in order to reduce any reliance on intermediaries. The responses indicated that investment in marketing, advertising and search engines/website visibility were strategies that all hotels should implement. In addition, they suggested investments in loyalty programs, competitive pricing and more attractive promotions/tour packages.

Most respondents agreed that the hotel's official website provides more reliable information about the property, with a percentage of votes of 67.2%. However, when it came to online travel agencies, only 33.2% of the participants agreed that they provide more reliable information about the hotels.

Concerning security during the purchase process, the majority of respondents agreed that the official website of the travel agency offers greater security, with a percentage of votes of 51.9%, whereas 33.1% disagreed that online travel agencies provide greater security. When analyzing personalized service, the majority respondents agreed that this factor affects their decision to purchase through direct distribution channels, with a percentage of 70.3%. Regarding flexibility for future changes and cancellations, 51.1% of respondents agreed that there is more flexibility when booking directly with the hotel, while 36.6% disagreed that online travel agencies offer the same flexibility. Most participants agreed that branded hotels offer greater quality assurance during their stay, with a voting percentage of 54.2%. In addition, 38.8% of respondents in the last question agreed that more affordable hotels could stand out more in the market if they invested in higher quality branded amenities.

5 Conclusion

In conclusion, we can state that most of the participants were young people between 24 and 29 years old, graduates and employees. It is possible to affirm that, from the perspective of the majority, the determining factors for the choice of the hotel establishment during their purchase process are based on the quality/price ratio, location and accessibility or only price issues.

Most of this young audience prefers, in the first research phase of their purchase process, to use online travel agencies, so that they can do more comprehensive research on what is available on the market and thus be able to compare all the prices available on the platforms. The majority of the participants in this study claimed that they would easily choose to book directly with the hotel if it brought them some kind of benefit that was superior to the one offered at an online travel agency. Simple things such as a meal included in the stay, discounts provided to tourist sites and local restaurants included, and spa services at a certain discount were examples of perks most voted by the 228 participants that would make them easily choose to book directly with the property. There is no doubt that hotels that offer incentives and rewards in the direct purchase, they are promoting this channel.

In the open-ended questions of this quantitative study, it is possible to better explore the opinion of the participants as consumers. The majority of the answers indicate that, in the first phase, when doing their research, they opt for online travel agencies for the diversity of options present on the platforms, as mentioned above, but also because they claim that the prices are lower or simply because they have been loyal for a long time on a certain platform and do not want to lose all the accumulated points or be receiving more spam from another platform for a new registration. Lei et al. (2019) argue that OTA are essential only to optimize demand, as most consumers nowadays need this indirect distribution channel to find more dynamic options and rates. The same authors state that, in fact, online travel agencies are the best means of advertising hotel units, so that the public can find a certain unit on a different platform. Berezan et al. (2015) also talk about the fact that customers already loyal to a platform do not want to be changing channels as they may have monetary disadvantages due to all the points previously accumulated. Still analyzing the open-ended questions, we can state that the majority of participants who book directly through the official website are aware of all the perks and exclusives they can have access to if they become a loyalty member directly with the hotel, taking into account all the extras, such as the higher levels of security during the booking procedure, the fact that they can find more reliable information coming directly from the company's own employees and the greater flexibility they find for future changes or cancelations of the reservation due to the fact that they can negotiate more favorable terms and conditions, especially if they are members of loyalty programs. It is essential to invest in details of the hotel's official website, in terms of design and functionalities, as it is one of the first means of direct contact between the company and the guest.

According to the results of the quantitative study conducted, another reason why participants prefer direct distribution channels is directly related to the personalized service they receive during the process. This factor emphasizes the importance of direct interaction during the purchase process, not only for reasons of greater security and sharing of reliable information coming directly from the employee, but also for reasons of loyalty and creating bonds between the guest and the company. Thus, guests feel valued and realize that their opinions and preferences are considered, which can avoid misunderstandings or complaints, thus contributing to customer loyalty and the desire to repeat the purchase in the long term. Matsuoka (2022) argues that guest relationship management leads to positive long-term performance, based on creating value throughout the customer experience, offering them what they idealized and more, enhancing their retention through their willingness to return to the establishment.

The majority of respondents state that online travel agencies are still very important for business growth. That is, even if there are high commission rates, hotel units can still benefit from these agencies due to visibility on these platforms and access to other types of market segments; hence, the general public advocates a balance in the use of both channels. Ye et al. (2018) argue that there are perfect periods to sell a product via indirect or direct, as long as they are properly studied, thus not detecting any issue of rivalry between them.

Thus, the main conclusions are based on the fact that consumers, at an early stage, have a preference to carry out their research in online travel agencies since they find a larger and varied panoply of options, being able to compare prices and hotel units and make the best possible decision. After making the decision, our young, qualified public said they were aware of all the advantages they could have when booking directly with the hotel, among many other benefits, such as levels of security, convenience, and more reliable information. The investment that hotel establishments should make to their official website was also considered by the public, as it is the first preferred means of direct contact for most participants.

The promotion of direct distribution channels in hospitality is an essential strategy for the success of your hotel unit and to achieve sustainable growth in the competitive hotel market.

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Adapted Tourism Offer for Visually Disabled Visitors Development of Tourism for All Through Service-Learning Activities



Radka Marčeková and Ivana Šimočková

Abstract The scientific goal of the article is to examine the barriers to the participation of visually disabled people in tourism and to point out the importance of service-learning activities in university education in the process of their removal. The article highlights the importance of the third mission of universities on the example of a service-learning project dedicated to visually impaired visitors in the tourism industry. It evaluates the results of a primary qualitative survey, carried out by the method of questioning with the technique of in-depth interview with 32 visually impaired respondents. The research results point to the insufficient level of availability of the tourism offer for visually disabled visitors, and the increased number of barriers in their everyday life. Even visually impaired people have a strong need to travel; however, more time is needed for them to plan their travel and stay. In case of appropriate and adapted tourism offer, more than 60% of disabled visitors would travel more often. The article emphasizes the importance of the equal right of all tourism industry visitors to profit from tourism services and to achieve a comprehensive experience.

Keywords Disability · Service-learning · Tourism enterprises · Tourism for all · Visitor

JEL Classification A₂₀ · L₈₃ · Z₃₂

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1 Introduction

Not only the majority of healthy people, but also visually impaired individuals show keen interest in traveling and discovering new destinations. The World Health Organization points out that there are up to 285 million people with visual impairments worldwide, with 39 million of them being blind and 246 million visually impaired (Moithiravally et al., 2014). Despite living in an era where humanity utilizes artificial intelligence and explores space, visually impaired individuals continue to face numerous barriers that prevent and significantly limit their travel opportunities. University students are also aware of this issue and can contribute to removing barriers for visually impaired persons by participating in Service-Learning projects during their studies.

Students at Matej Bel University in Banská Bystrica (Slovakia) engage in Service-Learning activities, thanks to teachers who actively participate in international and national projects focused on inclusion in tourism (Visegrad Fund Project 22220127—Application of Inclusion in Tourism in V4 Countries), service-learning in education (SLIDE project 2021-1-BE02-KA220-HED-000032235 entitled Service-Learning as a pedagogy to promote inclusion, diversity, and digital empowerment), and VEGA 1/0360/23—Tourism of the New Generation—responsible and competitive development of tourism destinations in Slovakia in the post-COVID era).

The article was created to emphasize the significance of Service-Learning activities in the university education and their contribution to the development of tourism for all.

2 Literature Review

More than 16% of the population suffers from a disability. They feel that they are still a marginalized minority in terms of accessing tourism services. The barriers they encounter prevent them from fully participating as part of the majority (Global Report on Health Equity for Persons with Disabilities, 2022).

The participation of disabled people in tourism requires the initiative and commitment of individual countries, interested entities, and the provision of an adapted tourism offering. Additionally, it is necessary to provide them with tourism services that are empathetic and friendly. For countries that prioritize the adaptation of their tourism offerings, this represents an opportunity to increase their competitiveness on the international market. The European Commission and the European Economic and Social Committee have recognized that adapting the tourism offer and developing inclusive tourism opportunities for diverse segments, including people with disabilities, brings significant social and economic value (Griffin & Stacey, 2011). This value is reflected in increased tourism revenue, job creation, and opportunities for international destination development.

Topics that impact the inclusion of disabled people in society within the context of tourism have been extensively discussed at the national and international levels in numerous countries around the world (Burnett & Bender-Baker, 2001; McKercher et al., 2003; Yau et al., 2004; Huh, et al., 2007; Mills et al., 2008; Darcy & Dickson, 2009; Darcy, 2010; Minnaert et al., 2011, 2013; McCabe et al., 2012; Minnaert, 2014; Mothiravally et al., 2014; Gillovic et al., 2015; Özöğül & Güçlütürk Baran, 2016; Polat & Hermans, 2016; Souza & Post, 2016; Agovino et al., 2017; Lyu, 2017; Kong & Loi, 2017; Loi & Kong, 2017; Anuar et al., 2017; Ceccarini & Prandi, 2019; Linderova & Scholz, 2019; Lam et al., 2020; Huang & Lau, 2020; Qiao et al., 2021; Nagarjuna & Vadarevu, 2021; Rubio-Escuderos et al., 2021; Agrawal et al., 2022; Obigbesan et al., 2023; Qiao et al., 2023; Duignan et al., 2023, etc.)

People with disabilities have the same right to travel as the healthy majority in society. This right is enshrined in the Global Code of Ethics for Tourism (UNWTO, Article 7, 2020). The term that encompasses travel for disabled individuals is tourism for all. It has been a part of the Takayama Declaration for almost 15 years (UNESCAP, 2009).

As the prevalence of disabled and disadvantaged people in the world increases, the segment of disabled visitors in the tourism industry also shows growth potential. Research indicates that this segment is willing to spend more money on travel than the healthy majority, particularly when specific needs are met (UNWTO, 2015; Yau et al., 2004).

Visitors with disabilities have limited manipulative and orientation skills in a typical environment. They require special care ().

Among the most common problems encountered by disabled people when traveling are architectural barriers related to tourism infrastructure, financial barriers, information barriers, communication barriers, and psychological barriers. These barriers are often linked to the insufficiently educated approach of staff in facilities that provide tourism services (Clery et al., 2017).

In order for tourism destinations to develop sustainably, it is necessary to adopt legislation oriented toward barrier-free accessibility and to ensure its compliance. Barrier-free accessibility significantly and positively affects the attractiveness of the tourism offer and the competitiveness of destinations on the international market.

Visitors in tourism with specific needs also include people with visual impairments, comprising individuals who are blind, practically blind (with preserved remnants of vision), visually impaired, and individuals with binocular vision disorders. Several academics have dedicated their research to investigate their inclusion in the tourism industry from different perspectives.

Qiao et al. (2021) investigated the primary factors influencing the behavior of people with visual impairments in leisure tourism.

Mothiravally et al. (2014) examined the attitude and perception of travel planning and travel experiences of the visually impaired in Malaysia.

Kong and Loi (2017) investigated the importance of accessibility factors from the perspective of the visually impaired and their family members to better direct the accessibility of tourism destinations, with a special focus on this segment.

The theory of visually impaired tourism deals with examining the various challenges visually impaired visitors encounter when traveling and their desire to discover new destinations.

Anuar et al. (2017) investigated the travel motives influencing the decision-making of visually impaired tourists. Additionally, they focused on the role of social media in their travel decisions.

Huang and Lau (2020) focused on understanding the needs of the visually impaired and explored how smart tourism destinations could potentially improve the tourism experience.

Loi and Kong (2017) pointed out the needs and problems faced by visually impaired people during travel in their study. Their ambition was to raise general awareness of the specific requirements of visually impaired individuals and the difficulties they may face.

Nagarjuna and Vadarevu (2021) identified the challenges faced by visually impaired students and their teachers at Devnar School for the Blind (India) in undertaking and organizing travel, along with identifying the facilities and infrastructure required for visually impaired students to travel.

Qiao et al. (2023) examined the travel experiences of visually impaired tourists, identifying seven types of experiences and exploring self-sensory compensation and external sensory compensation pathways in the experiences of such tourists.

Obigbesan et al. (2023) paid attention to the positive and high-quality experiences of visually impaired tourists.

Academics also focus on modern technologies and digital tools that can help improve the travel experience for visually impaired visitors. Mills et al. (2008) analyzed websites that offer tourism services and identified problems that disrupt the use of websites by the visually impaired segment. Mobile applications, voice navigation, and innovative technologies can be helpful for navigation, accessing information about current events, and more.

Ceccarini and Prandi (2019) presented a mobile application developed to facilitate the use of tourism services for people with visual impairments, including visually impaired and blind users.

Lam et al. (2020) conducted a qualitative study aimed at understanding the different types of obstacles encountered by visually impaired visitors when visiting urban attractions. The authors also explored the contribution of technology in removing barriers for smartphone and computer users to explore the city's attractions and technological innovations that improve tourism accessibility for visually impaired visitors in Hong Kong.

Agrawal et al. (2022) evaluated the usability and accessibility of India's official national tourism websites for visually impaired visitors.

An overview of the conducted research and its results is presented in Table 1.

The theory of visually impaired individuals as participants in tourism forms the foundation for understanding their specific needs and challenges they face.

Existing studies predominantly focus on regions outside of Europe. None of these studies address the needs of visually impaired visitors within any of the V4 group of countries, despite this region being geographically, economically, politically, and

Table 1 Summary of the results of existing studies in the issues of tourism for visually impaired visitors

References	Method	Geographical coverage	Research sample	Findings
Mills et al., 2008	Content analysis of secondary data	USA	20	It is reasonable to ensure that people with visual impairments can easily use the websites of tourism entities
Mothiravally et al., (2014)	Survey (interviews)	Malaysia	10	Awareness of the existence of visually impaired persons is very low in Malaysia. Compared to other countries, Malaysians do not seem to care about the welfare of these people in the context of travel
Kong and Loi (2017)	Survey (interviews)	Macau	16	The public's view mainly focuses on physical changes in facilities for PwD and typically ignores or underestimates the beneficial effects of the intrapersonal and interpersonal aspects
Loi and Kong (2017)	Survey (interviews)	China	Not specified	Not specified
Anuar et al., (2017)	Survey	Malaysia	Not specified	Relaxation, self-exploration, and accessibility are the significant factors that contribute to travel decisions made by the visually impaired tourists. Social media linked visually impaired tourists' travel for relaxation purposes rather than for other purposes
Ceccarini and Prandi (2019)	Survey (questionnaire)	Bologna, Italy	100	Some preliminary tests showed that the application results compliance with the most used screen readers and that users appreciated the provided functions and gamification mechanism

(continued)

Table 1 (continued)

References	Method	Geographical coverage	Research sample	Findings
Lam et al., (2020)	Survey (interviews)	Hong Kong	20	The interviewees' main concerns regarding barriers were knowledge constraints. The contribution of technology toward increased accessibility by highlighting that mobile applications have the capability to remove knowledge constraints. Maps and images are the two areas for future technology innovation
Huang and Lau (2020)	Experiment (multisensory participant observations and interviews)	Hong Kong	10	The study proposed a gamified approach to future tourism app design for people with visual impairments, which could enhance engagement, motivation, and enjoyment in the tourism experience
Qiao et al., (2021)	Survey (in-depth semi-structured interviews)	China	26	Support factors (travel companions, tour organizers, accessible environment) are important considerations for visually impaired travelers. Visually impaired individuals participate in leisure tourism to enhance their own abilities, relieve pressures on their families, break stereotypes associated with the visually impaired, and promote the need for greater tourism development specifically targeting visually impaired travelers

(continued)

Table 1 (continued)

References	Method	Geographical coverage	Research sample	Findings
Nagarjuna and Vadarevu (2021)	Survey (interviews)	India	10	The visually impaired students have the desire to travel but do not have the access to it, in terms of independence, access to information, guidance, social stigma, fear of socializing. Neither the students nor the teacher or management staff is completely satisfied with the current condition of tourism at Devnar School for the Blind
Agrawal et al., (2022)	Content analysis of secondary data	India	36 tourism websites	The result revealed that Indian state tourism websites had low usability and accessibility status, and they need much improvement to make them accessible to people with special needs
Obigbesan et al., (2023)	Survey (semi-structured interviews)	UK	Not specified	Five factors were identified that contribute to positive holiday experiences: excellent customer service; the kindness of strangers (both local people and other tourists); provision of audio and tactile interpretation at visitor attractions; the transformative potential of new navigational technologies; and the support provided by specialist companies
Qiao et al., (2023)	The analysis was based on travel notes written by Chinese visually impaired tourists	China	Not specified	Seven unique types of tourism experience were identified including "Sensory Compensation" and "Barrier-free experiences." The findings highlight opportunities to build a more comprehensive understanding of the tourism experiences of visually impaired tourists

Source Own

culturally distinct with a different tourism offering. Additionally, none of the studies connect education and Service-Learning as a component, with a focus on visually impaired individuals and the potential benefits for this segment, which we identified as a research gap. In the following text, we specify the possibilities of using Service-Learning in the education of university students, using a best practice example from Slovakia.

3 Methodology

Service-Learning is a structured educational experience that combines service goals with learning objectives (academic content) with the intention of bringing about change for all stakeholders involved. It is based on the reciprocity effect for students, the community, and the school. The pillars of Service-Learning are built on the collaboration of students, schools, and communities (Ilić et al., 2021, Fig. 1).

In the study, we focus on the practical experience of implementing Service-Learning activities within the tourism education program at the undergraduate level at the university. Under the guidance of an educator, students worked on a project with the ambition to volunteer and assist people with visual impairments. They collaborated with the Slovak Blind and Partially Sighted Union (SBPSU).

The SBPSU is a civil association that has been functioning since 1990, and its members include blind and partially sighted individuals, their relatives, friends, supporters, and professionals working in the field of visual impairment. The mission of SBPSU is to support and advocate for the rights of people with visual impairments, improve their quality of life, prepare them for integrated living, create conditions for their full participation in society, and provide social services, including specialized counseling and social rehabilitation.

The students of Matej Bel University in Banská Bystrica (8 students) in collaboration with SBPSU, under the guidance of an educator, conducted a primary survey using the guided interview technique from February to April 2023. They used the

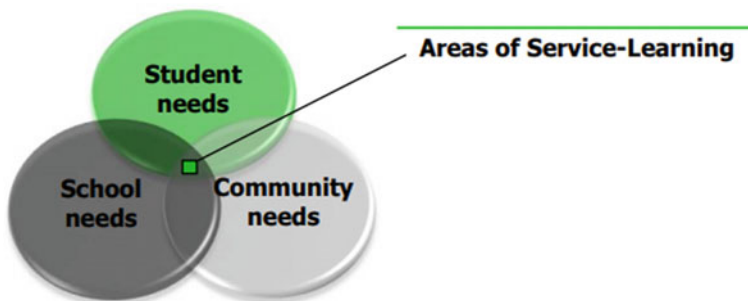


Fig. 1 Areas of Service-Learning. *Source* Brozmanová Gregorová et al., (2020)

snowball method to recruit respondents, and 32 visually impaired individuals participated. The students were interested in understanding how visual impairment limits their travel, what barriers they perceive, and their interest in participating in tourism. They investigated the main purpose of traveling outside their usual place of residence. They also explored whether they have a personal assistant to help them during travel, how frequently they travel throughout the calendar year, what information they need to verify before traveling to avoid disappointment. Additionally, they examined the greatest obstacles they face while traveling and what should be changed in Slovakia to enable visually impaired individuals to travel more. The respondents were asked about the most common obstacles they encounter when visiting accommodation facilities.

The study addresses the research question: Is the tourism offer in Slovakia adequately adapted for visually impaired individuals?

During the months of February to April 2023, students met with representatives of the Slovak Blind and Partially Sighted Union (SBPSU) and visually impaired individuals. They monitored their requirements and observations, analyzed the data, and worked on a brochure intended for providers of accommodation services. The article evaluates the conducted primary survey using content analysis of the text. It utilizes a word cloud and employs theoretical methods of scientific work, such as analysis and synthesis, induction and deduction, comparison, and generalization.

4 Results

The survey involved respondents (32) with visual impairments ranging in age from 22 to 80 years, with the majority falling within the age range of 38–58 years. Only 40.6% of the respondents were employed or engaged in business activities, while 43.8% were disabled pensioners. Other respondents included retirees, students, and parents on maternity or parental leave.

Almost half of the respondents (40.6%) were practically blind. Among them, nearly 22% were blind, 25% had low vision, and the remaining individuals suffered from binocular vision disorders.

A significant 87.5% of the respondents expressed clear interest in traveling during their leisure time to achieve a comprehensive experience.

The purpose of the respondents' travels included visiting relatives and friends, going on vacations, seeking medical treatment, or traveling outside their usual place of residence for work purposes.

More than half of the respondents have a personal assistant who accompanies them in their daily life, including during travel (56.3%).

Approximately one-third of the respondents (31.3%) travel an average of more than 6 times a year outside their usual place of residence for a comprehensive experience. About 28.1% travel 3–5 times a year, around one-third (31.3%) travel only 1–2 times a year, and 9.3% of the respondents do not travel for vacation purposes at all.



Fig. 2 Main barriers to the participation of visually impaired individuals in tourism. *Source* Own

Visually impaired respondents most frequently use train transportation, which might be related to its affordability in Slovakia and services provided free of charge to selected population groups. Half of the respondents also prefer using individual car transportation or buses. Only a few individuals prefer air travel, which might again be influenced by cost considerations and the preference for shorter distances.

Interviews confirmed that travel planning is much more complex for visually impaired individuals compared to the healthy majority of travelers. Before their trips, visually impaired individuals find it essential to verify information about transportation options to their destination, the prices of suitable accommodation services, accessible and barrier-free accommodation options, and available attractions in the destination. They also verify the reliability and correctness of online information and prices for dining options.

The main barriers to the participation of respondents in tourism are depicted in Fig. 2.

The survey confirmed that visually impaired individuals consider limited financial resources, transportation not adapted to their needs, and their own health condition as the major problems. They perceive untrained staff as a barrier, as well as staff unwilling to provide assistance. The lack of information about transportation options, including parking, accommodation, and dining, is also seen as a barrier. Psychological barriers such as fear of traveling, concerns about attracting attention, worries about unsuitable transportation or challenging terrain at the destination or during travel are also considered significant.

Table 2 highlights specific problems that visually impaired individuals perceive in their daily lives, including travel-related issues.

The survey focused on the most common problems that respondents perceive when visiting accommodation facilities. Respondents emphasized the almost inaccessibility of many pieces of information. They pointed out inaccessible (touch) buttons in elevators, touch screens to open doors, inaccessible menus, and lack of accessible information in rooms (minibar contents, Wi-Fi passwords, service price

Table 2 Negative factors impacting the daily life and travel of visually impaired individuals (using Slovakia as an example)

Poor orientation in unfamiliar environments, inadequate lighting conditions, inability to read labels if not in large font and placed very close
Insufficiently adapted websites
Trains without escorts, on-demand stops in unsignaled transportation
Inability to find a job – multifunctional employees are in demand on the labor market, financial problems
Fine line between open and unmanageable communication, uncomfortable questions from strangers
Officials communicate with assistants instead of the visually impaired, in the presence of the visually impaired, they tend to speak about them in the third person
Inability of broadcasters to provide audio commentary transmission on television
Unsignaled ATMs, touch-screen devices that issue customer queue numbers at post offices, mobile operator branches, banks
Inability to drive a car
Inability to safely distinguish colors at traffic lights
Unannounced stops in trains, problems at airports, poorly marked travel schedules at bus stops
Curbstone, stairs, and city scooters parked on the sidewalk
Touch elements on devices (touch buttons or touch screens)
Lack of reliable navigation applications
Unsignaled means of transportation, unaccompanied visual content, e.g., on social networks
Dangerous road crossing, some drivers are unaware that lifting the cane signals that the visually impaired person wants to cross the road
Weak interior lighting, lack of marking at the beginning and end of the staircase, revolving entrance doors
Inability to find out the bus number and its destination, difficult access to information often written in small print
Inability to read signs, door nameplates, price tags in stores, challenging orientation during travel and crossing roads
Overcrowded trains and truly difficult travel on Fridays and Sundays
Reduction of bus transport
Reduction of railway stops
Lack of transport assistance services, or their unreliability
Missing artificial guiding lines in station premises, making orientation challenging at times
Searching for platforms, validating tickets in public transport, finding the exit from the station
Insufficiently addressed orientation at the airport
Unwillingness to help

Source Own

lists, and others). The lack of preparedness of the staff to communicate with visually impaired visitors was identified as a problem. Reluctance of the staff to go the extra mile for visitors was also perceived as an issue, and in some accommodation facilities, respondents were not allowed to bring their guide dogs. Problematic issues included non-relief marked key cards, making them easily confused with any other card. Inadequate accessibility of accommodation facilities' websites, unclear room numbering, and illegible menus were also mentioned.

Respondents found weak lighting in entrance halls, wellness areas, and sanitary facilities to be highly disturbing. Unmarked stairs, glass walls, mirrored walls, winding corridors, accommodation on multiple floors with many stairs, and complex exterior layouts were identified as problematic.

The respondents in the survey expressed the belief that significantly improved accessibility of websites and mobile applications, both in Slovakia and abroad, would be beneficial. Information needs to be provided in Braille, using it for descriptions and designations of important places. It would be beneficial if the staff perceived individuals with visual impairments as regular clients and were prepared to assist them accordingly. Additionally, creating an additional paid assistance service in Slovakia, where travelers could order these services, was considered useful. It is desirable to comprehensively address audio announcements in public transport and not reduce stops. The construction of underpasses at railway stations, where they are currently lacking, is necessary. The introduction of announcements about incoming trains, even at small train stations, is also desirable.

Greater attention to assistance services, the provision of artificial guiding lines at stations and platforms, ensuring that websites and mobile applications are accessible with screen-reading devices for visually impaired users is essential. Activating stop announcements in public transport is necessary. Standardizing the shapes and labeling of buttons, marking buttons in Braille, and ensuring that they are consistently placed in familiar locations should be a priority.

Based on the results of the conducted surveys and collaboration with SBPSU, students proposed a brochure designed for accommodation facilities, highlighting how to properly provide accommodation services to individuals with visual impairments (Fig. 3).

The brochure includes crucial challenges for service providers that can help them become more competitive in the international market (Table 3).

5 Conclusion

The survey results confirm the complexity of planning vacations for visually impaired individuals in the conditions of Slovakia, which is related to the insufficiently adapted offer of tourism, the presence of various barriers encountered during travel, and the lack of complete and up-to-date information in the online space about the level of adaptation of specific entities involved in the development of tourism. They are

Equality is an important factor for each of us. Unfortunately, people with visual impairment do not always come into contact with understanding and sympathy. Equal treatment and non-discrimination are a lot more important for them because of that. Let's take a look at how to behave better in contact with people with visual impairment, especially when wanting to facilitate their traveling.

A person with visual impairment is a regular client, that is why you should communicate directly with him, not with his assistant. Ask him questions, give advice, escort him, acquaint him with the environment, and show him the possibilities of meals and accommodation in your facility.

Improve accessibility of your web page by regularly updating information and following rules for creating accessible websites of the WCAG standard.



A GUIDE DOG is a form of assistance for a blind person, so do not consider him as a social animal and always automatically allow his presence.

Fig. 3 Part of the brochure prepared within the service-learning project for accommodation facilities. *Source Own*

Table 3 Challenges for accommodation service providers for visually impaired visitors

Assistance	Ask how you can help. Addressing the person with willingness and friendliness forms the basis for significantly increasing the comfort and satisfaction of visually impaired visitors with the provided services
	Increase the number of trained, qualified, and knowledgeable staff who know how to effectively communicate with people with disabilities
	Communication is essential with every customer. However, when dealing with a person with an impairment, it requires more attention. Decent communication without pressure is also important. In case of special requirements, the visitor will contact you directly
	Call the person by name, or if you do not know their name, touch them lightly, introduce yourself, and do not hesitate to shake their hand. Face the person and be precise in your directions (avoid using vague words like “here” or “there,” but instead use specific directions like “on your right side” or “above you”)
	Assist the visitor with filling out documents and guide the tip of the pen to the signing point when signing
	Escort visitors to their room and provide a detailed description of the room
	Help the visitor with buffet service or offer assistance in reading the menu. Make sure to post the menu on your website so that the visitor can familiarize themselves with the offerings before visiting your facility
Clear print	By utilizing clear print, you enhance options and accessibility for visitors with visual impairments. How? Employ an uncondensed font on matte, non-glossy paper, ensuring contrast between characters and paper. Use a font without italics and underlining, and avoid fonts composed solely of capital letters. A recommended font size of 14 with adequate spacing between words and paragraphs is recommended, as well as avoiding excessively thin or ornamental fonts
Physical barriers in space	There are legal regulations governing the construction and modification of public spaces to cater to the needs of visitors with visual impairments. By implementing simple adjustments in your accommodation facility, you can enhance their stay
	For example you can: Mark doors with signs in enlarged letters and add Braille to elevator buttons. Label toilets with signs in enlarged letters or Braille. Provide cards to open doors that are also embossed. Include information in the rooms, such as the Wi-Fi password and price list of services, in Braille or clear print. Improve lighting in dimly lit areas. Establish barrier-free areas by clearly marking glass and hazardous objects, especially transparent doors, mirror walls, and dividing columns. Remove insensitively placed advertising banners and simplify the terrain. Enhance stair visibility by using contrasting colors, particularly for the first and last steps. Implement guidelines to aid with orientation
	By adhering to these measures, your accommodation facility can become more accessible and accommodating for individuals with visual impairments

Source Own

often exposed to challenging financial conditions that visually impaired individuals frequently face.

One of the main aspects of the research is the physical accessibility of attractions and tourism infrastructure. Visually impaired people encounter various obstacles, including inaccessible paths, unmarked pedestrian crossings, poorly accessible transportation, insufficient accessibility of buildings and tourist attractions. These barriers significantly limit their ability to move freely and utilize the offered tourism services.

Another significant element is communication accessibility. Visually impaired visitors may have difficulty accessing information about the destination. The usage of certain services can be problematic due to the lack of instructions on using various devices. Communication with local residents, tourist guides, or other subjects they encounter during their stay is often challenging. Improving communication and providing information in accessible formats can greatly enhance the travel experience for this group of people.

Another important area that needs attention is social inclusion and support. Visually impaired visitors may face prejudice, lack of understanding, and inattentiveness from other tourists or service providers. Support and understanding from staff, local residents, and tourist organizations, as well as all other entities interested in the development of tourism in the destination, can create a pleasant and friendly environment that allows visually impaired visitors to feel welcome and perceive the environment as safe. This will increase the competitiveness of destinations in the international market, as they will be able to provide quality tourism for all without discrimination.

We conducted a primary qualitative survey focused on 32 visually impaired individuals in Slovakia. In addition to the specific geographic area of Slovakia, the added value of the article is the example of good practice in implementing Service-Learning in university education. Service-Learning can have a significant positive impact on students' performance, the development of their critical thinking, teamwork, problem-solving skills, and empathy. These results were confirmed by feedback from participating students, which was obtained after the completion of the Service-Learning project.

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Mining Association of Outliers in Time Series



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Abstract Outliers or extreme values are patterns in the data, which do not conform to a well-defined concept of normal behavior. In today's often changing environment, detecting and forecasting outliers in time series related to stock market, credit card fraud, fraud in insurance systems, tourism demand indicators, etc., is a challenge for both humans and computers. In this paper, we present, for the first time, the association among the outliers in different univariate time series, and we formally define Mining Association of Extreme Values (MAEV). We then investigate how MAEV can be applied to forecasting outliers in a time series based on the detection of outliers in another. We evaluate the efficiency of the proposed methodology by applying it to hotel booking demand. More specifically, we first use an algorithm for automatically detecting outliers in time series such as booking volumes, arrival volumes, or booking cancellations, then we form a set of instances that correspond to time intervals, by considering in each instance the existence or not of an outliers for every different time series, then we apply Apriori association rule mining algorithm to the formed set of instances, and finally, we use the extracted association rules to forecast more outliers.

Keywords Outlier detection · Time series analysis · Association rule mining · Tourism demand analysis · Hotel booking demand forecasting

JEL Classification O32 · O33 · Z32 · L86

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1 Introduction

Extreme values, also known as outliers, are patterns in data that do not follow a clear-cut definition of normal behavior and typically seem to have been generated by a separate mechanism than the rest of the data. Businesses need to analyze business data and look for anomalies in today's frequently changing business environment. These insights can help businesses save money or open new business opportunities. Many different methods for finding outliers have been developed over time in various domains. While some of them are more generic in nature, others have been developed for more specialized uses. The most significant and widely applied of these are based on graphs, nearest-neighbor searches, clustering, statistics, and classification. Anomalies in data can be translated into substantial (and frequently crucial) actionable information in a wide range of application fields, which highlights the significance of anomaly identification.

In this paper, we present, for the first time, the association among the outliers in different univariate time series, and we formally define Mining Association of Extreme Values (MAEV). We then investigate how MAEV can be applied to forecasting outliers in a time series based on the detection of outliers in another.

Association rule mining is one of the most significant and key functions of data mining techniques. In transaction databases or other data repositories, it seeks to identify intriguing correlations, recurrent patterns, relationships, or casual structures between groupings of items (e.g., products). An association rule aids in determining the connections between items. Association rule mining is a well-liked data mining technique with several uses including market basket analysis, consumer segmentation, and fraud detection. There are many surveys, such as Kotsiantis and Kanellopoulos (2006), Karthikeyan and Ravikumar (2014), Ghafari and Tjortjis (2019), that present association rule mining algorithms. Association rule mining was introduced by Agrawal et al. (1993), and it was followed by successive refinements (e.g., Agrawal & Srikant, 1994; Boutsinas et al., 2008; Han & Pei, 2000; Park et al., 1995).

In this paper, we evaluate the efficiency of the proposed methodology (MAEV) by applying it to hotel booking demand. More specifically, we first use an algorithm for automatically detecting outliers in time series such as booking volumes, arrival volumes, or booking cancellations, then we form a set of instances that correspond to time intervals, by considering in each instance the existence or not of an outliers for every different time series, then we apply Apriori association rule mining algorithm to the formed set of instances, and finally, we use the extracted association rules to forecast more outliers.

Outlier detection has already been used for improving predictions on tourist preferences. For instance, in Meira et al. (2022), the objective was to enhance the supervised model's ability to identify just tourists who genuinely appreciate or detest a specific place of interest. The goal of that research was to examine methods for automatically predicting travelers' preferences for tourist attractions. The strategy involved predicting ratings from reviews that travelers left on TripAdvisor using machine learning algorithms and natural language processing techniques.

In the rest of the paper, we first present the proposed methodology and then the experimental tests on hotel booking demand. Finally, we discuss, and we conclude.

2 Literature Review

Exploring the relationship between outliers in time-series data within the tourism industry is a significant undertaking that can yield valuable insights for modeling, inference, and data processing (Tsay et al., 2000). Outliers in time-series data can result in model misspecification, leading to biased parameter estimation and suboptimal forecasting outcomes (Tsay et al., 2000). Hence, identifying and comprehending outliers are imperative for precise analysis and informed decision-making. Outlier detection has become increasingly important in the tourism industry due to its various applications, including seasonal adjustment, time-series model identification, and process control (Lin et al., 2011; Liu et al., 2011; Tsay et al., 2000). One instance of incorporating outlier detection techniques can be observed in the X-12 ARIMA adjustment procedure employed by the U.S. Government and in the SEATS and TRAMO programs adopted by the European Union (Tsay et al., 2000). Utilizing these techniques facilitates the identification and subsequent adjustment of outliers within tourism data, enhancing the precision of forecasts and analysis. In the realm of time-series data classification, data mining methods have been proposed that utilize association rule mapping to effectively identify outlier data (Qin & Min, 2020). The methods employed in this study leverage the association rule mapping technique to ascertain the association rules within the datasets (Qin & Min, 2020). By utilizing the interconnections among various variables within the time-series dataset, these methodologies can enhance the accuracy of outlier detection and the precision of data mining processes (Qin & Min, 2020). Detecting outliers in multivariate time series is a significant area of investigation within time-series data mining (Baragona & Battaglia, 2007; Meng et al., 2020; Oluyomi. et al., 2016). Multivariate time-series data is commonly observed in diverse domains, such as tourism (Meng et al., 2020). Identifying outliers in multivariate time-series data necessitates the examination of the collective behavior of the series and comprehending how outliers influence individual components (Tsay et al., 2000). Several methodologies have been suggested in the literature for identifying anomalies in multivariate time-series data, including independent component analysis and vector autoregressive models (Baragona & Battaglia, 2007; Oluyomi. et al., 2016).

In the tourism industry context, identifying outliers in time-series data can yield significant insights regarding the influence of events or phenomena on tourism activities. An investigation conducted by Hultkrantz and Olsson (1997) has analyzed the repercussions of the Chernobyl nuclear disaster on both domestic and international tourism in Sweden. Through examining time-series data and implementing intervention analysis, Hultkrantz and Olsson (1997) have successfully identified the persistent deterrent impact of the accident on inbound tourism. Long-haul destinations' impact on Mauritius's carbon emissions has been examined through the analysis of

time-series data (Durbarray & Seetana, 2014). Durbarray and Seetana (2014) have discovered a noteworthy and favorable correlation between the influx of tourists and the emission of carbon dioxide, thereby emphasizing the necessity for implementing cleaner technologies within the tourism sector to alleviate the impacts of climate change. In the tourism industry context, the exploration of outliers in time-series data poses a multifaceted challenge, necessitating the utilization of diverse data mining methodologies. Through advanced algorithms, researchers can effectively detect and comprehend outliers in time-series data by leveraging the relationships between variables and considering the joint dynamics of the series. This phenomenon could enhance the efficacy of modeling, forecasting, and decision-making processes within the tourism sector.

Time-series models that utilize reservation data are distinct within hotel reservations, primarily owing to the distinctive characteristics inherent to the hospitality industry (Huang & Zheng, 2022). The models mentioned above, namely booking curve models and pickup models, are designed to forecast hotel demand and quantify the volume of unmet reservations (Huang & Zheng, 2022). Identifying outliers in hotel reservation time-series data can provide valuable insights into atypical booking patterns, cancellations, or other irregularities that can potentially affect hotel operations and revenue. Numerous methodologies and algorithms have been suggested in academic literature to identify anomalies in time-series data efficiently. One potential methodology involves employing association rule mining techniques to establish the association rules within datasets (Qin & Min, 2020). Using the relationships between variables in time-series data can enhance the accuracy of outlier data mining, as Qin and Min (2020) demonstrated.

Moreover, Meng et al. (2020) have used time convolutional networks and autoencoders as potential approaches for detecting outliers in multidimensional time-series data. Within the realm of the hotel industry, the examination of online customer reviews can yield significant insights into customer satisfaction and preferences. The utilization of text mining and sentiment analysis methodologies has been employed in the examination of online hotel reviews, with the aim of discerning patterns in customer behavior and determining factors that contribute to satisfaction or dissatisfaction (Chittiprolu et al., 2021; He et al., 2017). According to He et al. (2017), an examination of linguistic cues derived from text analysis has revealed that contented customers tend to frequently reference intangible elements of their hotel experience, such as the hotel staff, compared to dissatisfied customers. In addition, the hotel industry has utilized social media analytics to examine online hotel reviews and acquire significant insights into customer preferences and behaviors (He et al., 2017). Organizations have the potential to derive valuable insights from the extensive pool of social media data by engaging in the processes of data collection, monitoring, analysis, summarization, and visualization of online customer reviews (He et al., 2017). This methodology can facilitate hotels in comprehending customer preferences, enhancing their services, and making well-informed business determinations.

3 Research Design—Methods

The proposed methodology is based on firstly detecting outliers in time series and then on extracting associations among detected outliers of different time series. The steps of the proposed methodology are presented in what follows:

Step 1: Data selection/preprocessing

In order to ensure that the data will be useful for our research, we first pick and alter it. Data on tourism is typically multivariate time series with both numerical and category variables. Our research requires daily data, and therefore, that is what we will be using. Additionally, for the numerical variables, we divided the time series into univariate time series.

Step 2: Outlier detection

Then the outliers are detected for each different time series separately. The adopted outlier detection technique is not critical.

Step 3: Form input transaction database

The outliers extracted from the different time series are grouped into user-defined time intervals. The outliers lying within a time interval form a “transaction”. More specifically, a transaction is formed by the identification codes of the time series that include an outlier within the corresponding time interval.

Step 4: Apply association rule mining algorithm

The formed transaction database is fed to an association rule mining algorithm to extract association rules. The adopted association rule mining algorithm is not critical.

Step 5: Evaluation

The extracted association rules are evaluated and justified by the user.

To present an example of the MAEV methodology, assume that, after Step 1 & 2, the outliers extracted from two univariate time series are shown in Table 1. Time series with the identification code “1” represents hotel cancellations per day and the one with the identification code “2” hotel arrivals per day. During Step 3, suppose that the user sets the time interval to month. Then, the existence of outliers is shown in Table 2, which forms the transaction database. The latter is fed to an association rule mining algorithm to extract association rules, during Step 4. The only extracted association rule is 12, for minimum support set to 30% and minimum confidence set to 75%. Finally, during Step 5, the extracted association rule is evaluated and justified, since extreme arrivals increase the possibility for extreme cancellations.

Table 1 Extracted outliers from the two different univariate time series

Date	1. Outliers for hotel cancellations	Date	2. Outliers for hotel arrivals
		01/01/2023	1
03/22,23,24/2023	3	03/09/2023	1
		04/13/2023	1
05/11,13/2023	2	05/3/2023	1
07/27/2023	1		
09/11/2023	1	09/4/2023	1

Table 2 Existence of outliers per month for the two different univariate time series

Date	Outliers
01/2023	2
03/2023	1,2
04/2023	2
05/2023	1,2
07/2023	1
00/2023	1,2
01/2023	2

4 Case Study

We evaluate the proposed methodology by presenting a case study concerning its application to hotel booking demand. To this end, we use the hotel booking demand dataset. It is first introduced in (Antonio et al., 2019), and it provides information on hotel demand for two hotels, a resort hotel (H1) and a city hotel (H2). The steps of the proposed methodology were as follows:

Step 1: Data selection/preprocessing

Data on tourism is usually kept as multivariate time series with both numerical and category variables. We preprocess the numerical variables by dividing the time series into univariate time series.

In the case study, we selected the records of the hotel booking demand dataset concerning the resort hotel. Each observation within the dataset corresponds to a hotel reservation between July 1, 2015, and August 31, 2017, including reservations that arrived and reservations that were canceled. In the case study, the used univariate time series are created out from the hotel booking demand dataset by using pivot tables to calculate the sum or count of each variable in the dataset for each different date. The selected variables/time series are described in Table 3.

Table 3 Used variables/time series

Variable name	Explanation
1. Canceled	Sum of canceled bookings for each day
2. Previous cancellations	Sum of past reservations that customers canceled before the current reservation for each day
3. Lead time	Number of days that passed between the booking date and the arrival date after it was entered into the PMS
4. Adults	Number of adults for each day
5. Children	Number of children for each day
6. Babies	Number of babies for each day
7. Stays in weeknights	Number of weeknights (Monday through Friday) the visitor stayed or made a reservation at the hotel
8. Stays in weekends	Number of Saturday or Sunday nights the visitor spent or reserved to spend at the hotel
9. Parking spaces	Sum of the parking spaces required by the customers for each day

Step 2: Outlier detection

In the case study, we adopted the outlier detection technique presented in (Katsouda & Boutsinas, 2023). In the used technique, outliers are detected based on the angle formed between each of time-series' bars. The bars represent the values of the time series. The key idea behind this technique is that the outliers appear to be "seen" with smaller angles from bars denoting the time-series' average values. Wide-angle "seen" bars cannot contain outliers. The sum of angles is sorted into an ascending list. Each sum of the list is compared to the prior sum to identify extreme values. If the sum of a bar is less than the previous sum plus a percent, the bar is considered an outlier. We iteratively calculate the outliers for each distinct percent, until there is a significant shift in the number of detected outliers. The first 15 lines of the extracted outliers of our dataset are shown in Table 4.

Step 3: Form input transaction database

The user-defined time interval is used to group the extracted outliers from the various time series. The time interval is set to a 7-day period, as shown in Table 4. The input transaction database, which is formed based on the existence of outliers in various time series for each time interval, is shown in Table 5. For example, the number 2 appeared in the first line, means that for the first period the only time series in which we can find an outlier is time series with the identification code 2 (previous cancellations).

Step 4: Apply association rule mining algorithm

In the case study, we adopted the Apriori association rule mining algorithm. The Apriori algorithm (Agrawal & Srikant, 1994) is historically the first milestone in the development of association rule mining. Apriori employs a "bottom up" strategy in which candidate groups are tested against the data while frequent subgroups are

Table 5 First 15 lines depicting the existence of outliers for each time series for each time interval

Start date	End date	Outliers
01-07-2015	07-07-2015	2
08-07-2015	14-07-2015	
15-07-2015	21-07-2015	
22-07-2015	28-07-2015	
29-07-2015	04-08-2015	
05-08-2015	11-08-2015	
12-08-2015	18-08-2015	
19-08-2015	25-08-2015	
26-08-2015	01-09-2015	
02-09-2015	08-09-2015	2
09-09-2015	15-09-2015	1, 2, 4
16-09-2015	22-09-2015	2
23-09-2015	29-09-2015	2
30-09-2015	06-10-2015	
07-10-2015	13-10-2015	
14-10-2015	29-10-2015	

expanded one item at a time. When no more successful extensions are detected, the algorithm ends. A frequent itemset’s non-empty subsets must all likewise be frequent, according to the primary tenet of Apriori (downward-closure property).

A tree structure and breadth-first search are used by Apriori to efficiently count candidate itemsets. From itemsets of length $k-1$, it creates candidate itemsets of length k . The candidates with infrequent subpatterns are then eliminated. The candidate set contains all frequent k -length itemsets according to the downward-closure property. The transaction database is next scanned to identify the most common itemsets among the applicants. Association or correlation between itemsets is presented by association rules.

The best association rules extracted by Apriori using the Waikato Environment for Knowledge Analysis (WEKA) software which is an open-source data mining platform written in Java (minimum support and minimum confidence is set to 0.1) follow:

1. Lead_Time = 1 Adults = 1 32 \Rightarrow Parking = 1 16 conf:(0.5)
2. Lead_Time = 1 48 \Rightarrow Parking = 1 16 conf:(0.33)
3. Adults = 1 144 \Rightarrow Parking = 1 16 conf:(0.11)
4. Cancel = 1 Pre_cancel = 1 38 \Rightarrow Adults = 1 38 conf:(1)
5. Pre_cancel = 1 228 \Rightarrow Adults = 1 38 conf:(0.17)

Step 5: Evaluation

The extracted association rules, during the previous step, are then evaluated and justified. For instance, the first and fourth rules are stronger than the rest, based

on the “confidence” measure (0.5 and 1, respectively). For instance, the first rule indicates that when there is an outlier to the lead time (3) time series and to the adults (4) time series then there is an outlier to the parking (9) time series. Note that, the existence of outliers on the lead time series indicates that there is a long time that has passed between the booking date and the arrival date, while the existence of outliers within both the adults and the parking time series represents a great increase in their values. Thus, Rules 1 to 3 arise logically from experience, since an increased lead time corresponds to early arranged itineraries which, of course, include parking services.

According to the fourth rule, there is an outlier to the adults (4) time series whenever there is one to the canceled (1) and previous cancellations (2) time series. Note that the existence of outliers within both time series represents a great increase in their values. By analyzing Rule 4, one can determine that a large number of cancellations primarily take place during extreme demand (represented by an outlier within adults (4) time series) and hence have no severe impact on the number of tourists finally arrived.

5 Discussion and Conclusion

The proposed methodology aims to extract associations among the outliers in different univariate time series, so that the existence of an outlier in a specific time series, within a time interval, could designate the existence of an outlier in another one, within the same time interval. Thus, the proposed methodology could be used for short-term forecasting outliers in time series.

In the presented case study, the knowledge about relationships among outliers is extracted by applying association rule mining. However, such knowledge can be extracted by applying other machine learning paradigms, such as classification analysis, which is one of the most significant data mining tasks. Classification is a supervised learning process, where a set of pre-categorized data training is used to extract knowledge. Classifications of data are displayed by using decision rules, decision trees, etc. For instance, decision trees are tree structures that depict the connections between pieces of data. The control of the characteristics is identified by each of its internal nodes. Every link between the internals and the offspring represents a potential value for the trait.

Thus, during Step 4 of the proposed methodology, classification analysis could be applied directly to Table 4. In Fig. 1, a decision tree is shown, which is extracted by the popular J48 classification algorithm, using the WEKA Software, and setting as class the parking (9) time series.

According to the extracted decision tree, the existence of outliers within the parking (9) time series (represented by the rightmost leaf of the decision tree) is related with the existence of outliers within both the lead time (3) and adults (4) time series, within the same time intervals. This knowledge is also extracted by the first association rule extracted during Step 4 of the case study presented above.

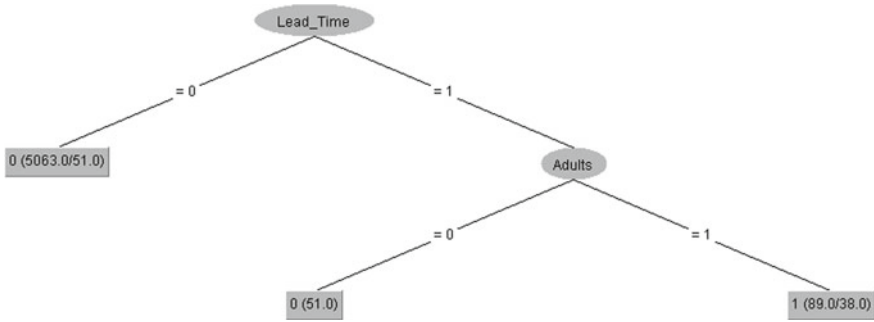


Fig. 1 Decision tree for the parking time series (9)

In conclusion, the exploration of both outliers and their associations, within time-series data about hotel booking, holds significant value as it enables the identification of anomalies and atypical patterns within the hotel industry, thereby offering valuable insights.

Our future research in the tourism demand analysis field holds the potential to provide hoteliers with enhanced tools and knowledge, empowering them to effectively navigate the intricate nature of demand patterns with increased assurance and anticipation. Such tools could be added to or cooperate with existing systems concerning the tourism industry (e.g., Halkiopoulos et al, 2021).

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A Needs Analysis of Mothers Travelling with Their Families in South Africa



Rosa Naudé-Potgieter

Abstract Family travel is unquestionably a significant part of the domestic tourism market in South Africa, with mothers normally responsible for holiday arrangements. Families with kids have unique needs that must be catered for to make a family holiday memorable. This study conducted a needs analysis of mothers specifically travelling with their families to identify how accommodation establishments can improve their offering and be viewed as more “family-friendly”. A quantitative study was conducted using a snowball sampling technique with over 106 participants responding to the survey. Mothers, specifically, were targeted over various social media and WhatsApp groups solely dedicated to mothers, and respondents were further motivated to share the link of the survey. Respondents had to be mothers with a family who have been on holiday in the last two years. Descriptive statistics were drawn, such as means, standard deviations, and frequency tables paired with inferential statistics, all analysed on SPSS. Preliminary results suggest that there are definite needs that are currently unmet, and holiday destinations should address these to cater to the extended family. Self-catering accommodation was the most preferred accommodation type, because of the convenience this accommodation offers a family, and coastal areas were identified as the preferred destination for most families. The main considerations to consider while choosing a holiday were affordability and the establishment’s convenience. The results of this study are discussed in terms of what holiday destinations and establishments need to improve, to make their facilities more family-friendly, which should assist establishments in gaining a better competitive advantage in the family holiday market.

Keywords Travelling · Families · Mothers · Needs · Family-friendly

JEL Classification Z39—Other (tourism)

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1 Introduction

Families in South Africa who travel and go on holiday are a considerable part of the domestic tourism market and one of the biggest consumer markets in the contemporary world (Wu & Wall, 2016: 274). Family travel may result in a major economic boost for the host area due to the size of the group travelling, normally two adults with one child or more. This group can even be bigger with extended family members joining in on holiday, increasing the economic impact. A family group is a diverse group of people in terms of genders, ages, generations, sometimes with varying backgrounds, mobility differences, and interests that have to be catered for (Wu & Wall, 2016: 274). Family tourism is defined by Schänzel et al. (2005: 106) as travel away from one's home, for more than one day, and it is taken within the context of a family group (at least one adult and one child). Therefore, the tourism industry must fully understand this niche market, their needs, and the actual challenges experienced at their holiday destinations. This is especially due to the fact that this market is slowly but surely going through some changes (Schänzel & Yeoman, 2015b: 356), such as the increased importance of fathers in holiday decision-making, the increased role of children in the families and families that have to utilise condensed time together optimally. A tourism supplier that meets this family's needs will reap the financial benefits and most likely the benefit of repeat visits due to the family's satisfaction.

2 Literature Review

As Cullingford (1995: 121) put it to us: "children are a valuable source of income", as there are many school holiday periods in which children require entertainment. With the emergence of the proposed 4-day work week for employers, this economic impact might be of greater relevance now, giving families more time for leisure and travelling (Staff Writer, 2022). Nickerson and Jurowski (2001: 19) and Cullingford (1995: 121) highlighted that children are starting to play an increasingly important role in deciding to go on holiday and where to go on holiday. As Cullingford (1995: 122) put it, "they bring an increasing level of sophistication to the whole business of travel." Secondly, with more parents working nowadays, the result is an increased expendable income which is paired with less time to spend with one's kids (Nickerson & Jurowski, 2001: 19). Li et al. (2017: 1047) stated that within the modern society, parents are nowadays under immense pressure to extract the maximum value from their limited time so that they can experience quality family time. Parents, therefore, use holidays to reconnect with children and family (Nickerson & Jurowski, 2001: 19), further leading to an increase in family holidays. Li et al. (2017: 1047) confirmed that tourism is a notion where families can spend time together and bond and therefore the ideal way of enjoying quality, happy family time.

Rojas-De-Gracia and Alarcón-Urbistondo (2020: 1) attempted to define satisfaction, but concluded that it is a complex concept to which researchers can still not

agree on, due to the numerous unconnected factors which can influence the experience. The study by Rojas-De-Gracia and Alarcón-Urbistondo (2020: 10) found that international holidays generally result in greater satisfaction experienced by all family members, especially the kids.

Families currently represent a significant and growing tourism industry market that values experiences such as family togetherness, keeping family bonds going and creating special family memories (Schänzel & Yeoman, 2015a: 141). This results in a growing number of family holidays undertaken while the characteristics of the group are constantly changing, such as higher female employment, higher divorce rates, longer enrolment in tertiary education, elderly people living for longer and families being geographically dispersed (Schänzel & Yeoman, 2015a: 141). When looking at the relationship between kids and their parents, it is viewed as the most essential bond between humans (Schänzel & Yeoman, 2015a: 141) and why family holidays together are vital. Durko and Petrick (2013: 720) reminded us that for generations now, a highlight of various childhood memories typically includes a family holiday. Shaw et al. (2008: 13) concur that family holidays are vital in a family's life cycle and contribute cultural meaning for the family.

Schänzel and Yeoman (2015a: 142) listed various changes that families are undergoing that make them being understood much more critical. Changes like changing family structures and blended families, an increase in immigration out of one's country of birth, multi-generational travel increasing, a growing need for creating memories with family, a growth in helicopter parents, an increasing need of experiential family holidays, changing gender roles and children that are becoming more sophisticated consumers (Schänzel & Yeoman, 2015a: 142). With all of these evolving trends, families need to be understood better to be catered for better.

The family life cycle (FLC) model stages, as proposed by Wells and Gubar (1966: 355), divides families into various stages based on the family composition. Life stage 3 is a young married couple with the youngest child under the age of six, while life stage 4 is a married couple with the youngest child over the age of six or an older married couple with dependent children. Cullingford (1995: 122) found that significant factors influence the choice of holiday destinations such as the family life cycle, amount of wealth, finding a place where other children will be present or preferably beaches, peace and safety and packages with entertainment for kids. Schänzel and Yeoman (2015a: 141) found that families rather seek destinations that will offer them relaxation, novelty, outdoor activities to participate in, and arts and heritage sites that can be visited, while they will least likely want to experience local cultures.

What should be remembered is that today's children are the future adult holidayers (Cullingford, 1995: 121; Nickerson & Jurowski, 2001: 28). Thus, it is vital for the tourism industry to understand this niche market, their needs, and their current satisfaction with the establishments visited. The study by Li et al. (2021: 9) found that children have an increased knowledge capacity on tourism and therefore play a vital role in impacting the family's holiday decision-making process. Finally, challenges that will guide the industry where to make improvements and ideally improve their offering to travelling families need to be identified. Wen (2020: 511) resolved that

parents generally experience a sense of helplessness when they experience obstacles during their holiday, especially regarding their children's health and safety. Yet, he found that parents still decide to continue with holidays despite the various challenges they experience. Li et al. (2017: 1052) concurred in that when a family wants to take younger kids on travels, there is a general feeling that it is not a wise decision according to the conventional concepts. Parents are generally criticised for this decision before a holiday begins, but Li et al. (2017: 1055) is of the view that a holiday is an extension of life, rather than a novelty. Schänzel and Yeoman (2015b: 356) put the challenge to the industry that they should try and limit the inconveniences to families and maximise the benefits, as they will then surely experience success, compared to operators that do not observe the stresses involved in travelling with kids.

Poria and Timothy (2014) found a critical gap within the tourism literature regarding children's travel and thus an area that urgently needs to be explored. Wen (2020: 511) fully-heartedly agreed with this comment that families with babies or younger children have greatly been ignored in tourism research and research. Li et al. (2017: 1047) commented that family travel is slowly but surely gaining growing attention from the tourism industry and academia. Wen (2020: 511) stated that tourism researchers need to focus on parent's perceptions of planning and going on family holidays and their psychological states during this process. Nickerson and Jurowski (2001: 21) have noticed that especially hotels and cruise lines are focussing more on their offerings and programmes available to children. In the study undertaken by Rojas-De-Gracia and Alarcón-Urbistondo (2020: 1), it was concluded that it is important for parents that the whole family should be satisfied with the holiday and further added that their children and their experiences influence the satisfaction of parents. Khoo-Lattimore et al. (2017: 159) commented that the tourism industry should be careful not to treat families homogenously, especially with families that has older or adult children.

The researcher will aim with this study to gain further clarity as to the need and overall satisfaction with the holiday destinations, and what challenges they have experienced, from the mother's perspective. This is the opportunity for families to voice their concerns and needs from holiday destinations. During the empirical study, limited research on the proposed topic could be found and even less so within a South African context. The insights that will be provided with this study will be of unmeasurable value to holiday destinations that specialise or pride themselves on offering family holidays. Management will have a better idea of what families are interested in when going on holiday and what important features impact their holiday experience. The results will further prompt academia to undertake more and more in-depth research on this untouched topic for better understanding. The main goal is to improve the destination to be viewed as more "family-friendly."

3 Methodology

Research design and method of data collection

This exploratory study was conducted, using a quantitative online survey shared on various WhatsApp and Facebook groups, dedicated solely to mothers. Respondents were motivated to share the study link, resulting in a snowball sampling method being applied. Typical Facebook groups requested to share the link included PhD Mamas, Blairgowrie Moms, #MomLife, Mamas Vragies 24/7, South African Multiple Birthing Association, Multiple moms, Die mamma groep, and Tweeling mamas. Secondly, personal contacts of the researcher on WhatsApp (whether close contacts or just general contacts) were sent the link and requested to participate in the study. The study initially underwent a pilot study period for a week in April where 21 close contacts of the researcher were requested to complete the survey. Based on the feedback and responses, minimal changes were made to the survey and the full survey then shared on the social media platforms.

Population and sampling

This study focussed on South African mothers with children, who have travelled with their family in the past 2 years. These mothers are typically active on social media, especially Facebook, as this is the main channel through which they were contacted for the study. The study population of mothers with children, active on Facebook, is unknown, and determining the sample size is challenging. The goal will therefore be to obtain as close to 200 responses, which Israel (1992) views as a “good sample size”. The study has currently obtained 106 responses and is still running to reach the 200 responses target eventually. The initial pilot study was conducted at the end of April 2023 with 21 respondents to determine the proposed study’s quality and efficiency. It was agreed that the pilot study delivered the acceptable results and the decision was then made to continue with the main study in the month of May 2023 with the survey still running. A non-probability sampling method was followed with convenience sampling taking place.

Data analysis

The processing of the statistical results of the experiential research was conducted by the researcher as well as the Statistical Support Services at the Tshwane University of Technology. Basic descriptive statistics such as means, standard deviations, and frequency tables were utilised during this study. A factor analysis was used to reduce the amount of variables and use the appointed factors as dependent variables that is influenced by various constructs (Salkind, 2009).

4 Results

The following results can be reported on based on the data gathered.

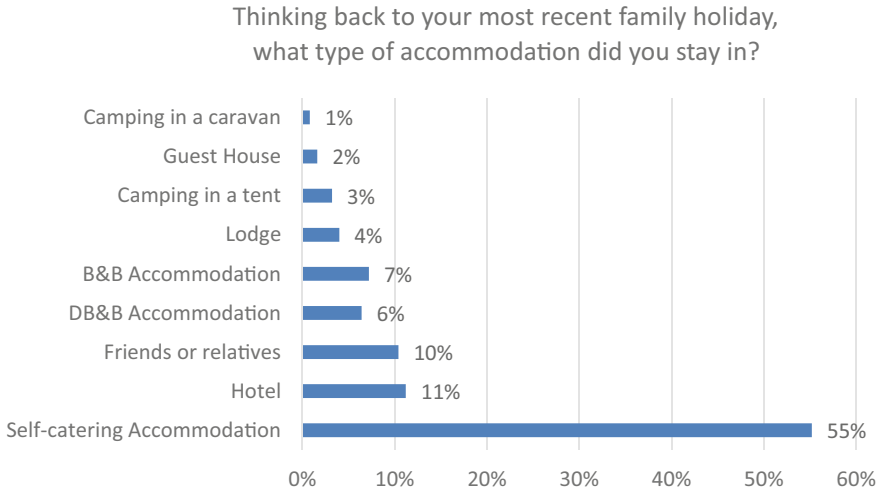


Fig. 1 Most preferred accommodation type

Based on the results in Fig. 1, it is clearly indicated that families prefer staying in self-catering accommodation (55%) with the second option being highlighted as staying in a hotel (11%) and the third option staying over with friends or relatives (10%). The least utilised accommodation type was camping in a caravan and guest houses. It would be interesting to see the change in results when the survey link would be shared with camping groups on Facebook, as it is known to be a very busy community in South Africa, due to the cheap rates of camping.

Figure 2 depicts the various reasons why the respondents selected their preferred accommodation type. The top reasons included the accommodation to be affordable (29 respondents), for the convenience (24), because it is a club point destination/time share or a family home (8), due to the freedom they would experience (8) and lastly because it is family and kiddies friendly (6). Convenience refers to an establishment being versatile in its’ offerings, where the family can cook/braai their own food, at their own time and thus not being bogged down by restaurant opening and closing times. These findings align with the study results by Khoo-Lattimore et al. (2017: 159) who found that the main reasons why families select a certain destination of accommodation type are for the “location of the accommodation, the quality of interactions, child-friendly amenities, and safety and family-oriented programmes.”

Figure 3 reports the various reasons why mothers of the family decide to go on holiday. The most prevalent reason, answered positively by 93.40% of the respondents, was to spend time with the family. Other reasons were listed such as to relax (74.53%), to enjoy the outdoors (66.98%), to get rid of stress (58.49%), and the see and do new things (54.72%). The least important reasons were learning about the area’s history or culture (11.32%) and gaining perspective or solitude (12.26%). During Wen’s (2020: 511) study in China, he found that travel opportunities for families are vital to broaden children’s horizons in terms of what they are learning and

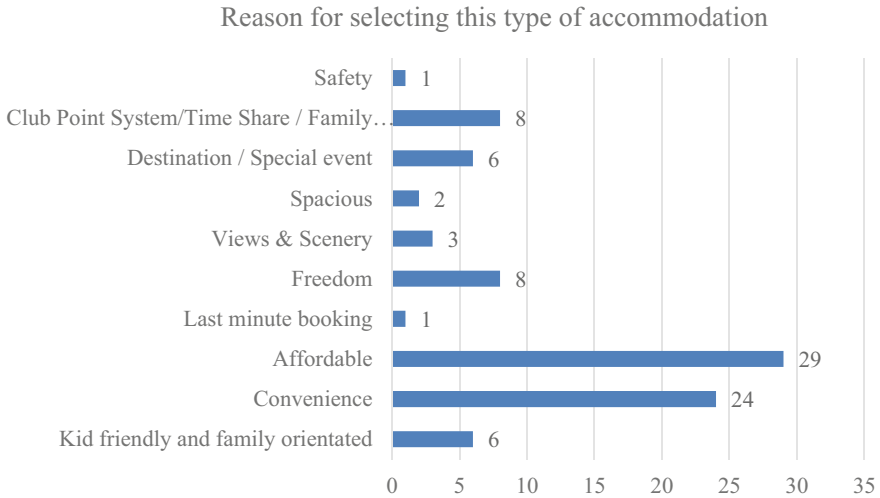


Fig. 2 Reason for selecting the accommodation type

experiencing. During the study by Li et al. (2017: 1047), five different motivation themes emerged as to why families decide to go on holidays. These motivations are listed as “spending quality time with children, creating pleasant memories, learning and development, compensation for children, and self-compensation”). Durko and Petrick (2013: 720) make a further contribution with their findings in that travel is generally seen as an outlet for relaxation, education, and the opportunity to escape the everyday routine, but that there are even more deeper reasons for travel such as a way to facilitate quality family time, to improve communication within the family, to decrease the possibility of a divorce taking place, to improve lifelong family bonds, and to facilitate a sense of well-being among the family members generally. Frost and Laing (2016: 4) specifically focused on the need to get children to visit more heritage sites and highlighted the importance that families and tourism should aim to revise this drive for the children’s educational purposes. Shaw et al. (2008: 13) support the findings with similar findings that holidays are seen as a form of escape from the daily pressures of one’s life, despite the “work” associated with being on a holiday. Other reasons identified by Shaw et al. (2008: 13) include an opportunity to improve family togetherness, communication, and a sense of cohesion in the family.

Figure 4 concluded that most families prefer going to new accommodation establishments in new areas, thus exploring new destinations during their holidays. The second group of people do prefer to rather go the same accommodation establishment each time. Therefore, this indicates the opportunity for a considerate number of families that will return to an establishment if they were thrilled during their visits. The goal for establishments would therefore be to focus on this group of families and ensure that one gets return visits out of them.

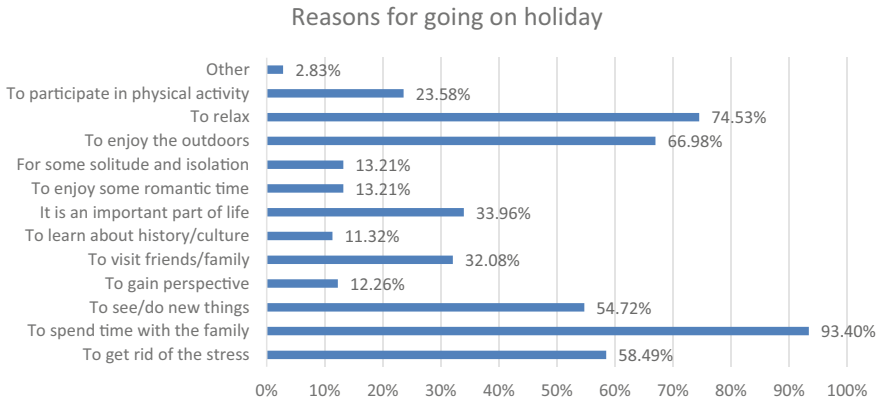


Fig. 3 What are some of the reasons for going on holiday

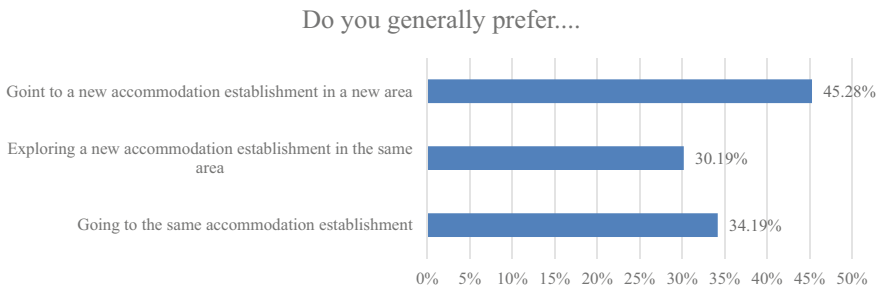


Fig. 4 General preference of accommodation selection

5 Conclusion

From the results, it is clear that self-catering family accommodation offerings are by far the most popular accommodation type preferred by families. This finding should assist accommodation management companies in knowing what type of an accommodation offering to develop, if their goal is to attract families. The main reason for this selection was convenience in that the families are not tied to restaurant trading times or only a specific food offering and the price of the establishment. Therefore, having a wide variety of restaurant offerings, or alternatively, different food-themed evenings should cater for the wide variety of family needs. Further, giving the option to the family to indicate what time they would like to have their food ready, instead of having to arrive at a restaurant during specific trading times and then waiting for the food to be cooked, should make family dinners a lot more enjoyable. Secondly, establishments will need to consider their pricing structure for this group of travellers, as they are very price sensitive, due to the big size of people travelling. Therefore, the challenge is to make accommodation as reasonable as possible and try

and make revenues through other streams (such as children entertainment, alcohol, food, and beverage) which the families indicated they are willing to pay for.

Suppose other forms of accommodation offerings could therefore be more lenient with the food offerings, trading hours, and the cost of accommodation. In that case, they might be able to attract more families. Ideally, that would contribute more to the mother's relaxation because she does not have to cook. Insightful findings were to find as to the reasons why mothers go on holiday with their family. The main finding was that it is to spend time with the family, confirming the fact that time with family is nowadays so much more valuable in our hurried times. This almost resounds the message "I don't care where I am, and what I do, I just want to spend quality time with my family". The second reason for the holiday was to relax, although this does not seem to be the case for the mother who is still expected to cook the meals and wash the clothes as per the amenity requirements.

The results of this study confirm numerous of our suspicions regarding family travel, even though insightful conclusions have also been made such as the need to cook on their own time schedules, even though it will add to the pressure on the mother. The findings of this study should assist holiday destinations to focus on the right accommodation type as well as amenities to hopefully contribute to the family's experience and so ensure a return visit. Further, this study should prompt researchers to want to do more research regarding this topic and fully understand this lucrative market that needs to be serviced in the tourism industry.

This study proved to have been much more challenging with the snowballing sampling technique which was expected to deliver a high amount of results. Instead, the researcher had to be constantly engaged, resharing the link, reminding people to participate in the study. The ideal situation would be to have a much greater number of respondents participate in the study, and other sampling techniques would therefore be recommended. A further limitation to the study is that most respondents came from the Gauteng area, as this is the area the researcher resides in and would have shared the link from. The recommendation would therefore be to expand this study and ensure that respondents cover all nine provinces of South Africa to ensure a truly representative study.

It must be borne in mind that these results are from the perspectives of the mother of the family. Incorporating views of the father and finally the children can supply one with more insightful findings and depth.

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Exploring Greece's Residents Travel Intention in the Post-pandemic Era Throughout the Imprint of Covid-19 on Their Travel Behaviour



Konstantinos Mouratidis, Maria Doumi, and Stelios Ioannidis

Abstract The purpose of this paper is to examine the changes in the travel behaviour of Greeks during the Covid-19 pandemic and in the post-pandemic era. It focuses on recording and comparing the above changes based on two parameters: the geographic area of permanent residence and their demographic characteristics. The empirical research of this study was conducted among residents of Greece. A stratified random sampling was used, in which Greece's thirteen regions were regarded as strata. The findings revealed that the pandemic has affected the travel behaviour of the Greeks, both in correlation to the region of their permanent residence and to their demographic characteristics. The results of the research revealed the travel preferences of the Greeks, which are shaped by hygiene and safety rules as well as by particular health protocols related to both hospitality and transport. This research could be the base for an effective plan for future tourism aiming at offering a diversified tourism product. Future research could focus on comparing the mentalities of residents from different destinations varying from island to mainland or from low to high case indicator, etc., the results of which could provide further important information on the changes in the travel behaviour of the residents.

Keywords Travel behaviour · Decision factors · Perceived risk · COVID-19

JEL Classification Z3 · Z30 · Z32 · Z38 · Z39 · I1 · I15 · I18

1 Introduction

The Covid-19 pandemic has led to unexpected changes in everyday life and the way that people live, a fact that has had a tremendous effect on the travel industry. Many destinations remained for a very long time without tourists, transport was limited to a minimum and as a result, enterprises faced recession (Walas & Kruczek, 2020). The

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above effect was attributed to both the change in tourist behaviour and the restrictive measures imposed (Brough et al., 2020; Donaire et al., 2021; Sanchez-Perez et al., 2021). From the beginning of the pandemic all countries, with just small differences, imposed a series of protection measures that included cancelling all types of events, staying at home (quarantine), forbidding movement, suspending the operation of airlines, hotels, etc. The above measures shook the international economy, resulting in countries that largely depend on tourism then placed their hopes for recovery in the summer season of 2020. However, due to the spread of the pandemic and the high number of Covid-19 cases in many countries during the summer of 2020, the uncertainty and the fear to travel remained.

Of course, this was not the first time that a health crisis affected tourism, as not long ago, and more specifically at the beginning of 2000, SARS had caused significant uncertainty. According to the WHO, over the past number of years more than 20 diseases have been characterised as epidemics or pandemics, which affected tourism at a local level but not to the same extent as Covid-19, for example, cases such as the Ebola virus, the yellow fever, the Crimean-Congo hemorrhagic fever, the Lassa fever, the avian influenza, the swine flu, etc. In all the above cases, the feeling of danger more or less affected the consuming and travelling behaviour. Still, none of the aforementioned diseases ever received so much attention from the international society as Covid-19, and consequently, the feeling of danger was not that intense. The above fact has resulted in Covid-19 becoming a milestone for the return of tourism, by reshaping and renewing the way it operates, and at the same time, it has highlighted the vulnerability of the tourism industry to any kind of health crisis (Jin et al., 2019; Sanchez-Perez et al., 2021) and its close relationship to risk and safety (Wen et al., 2021; Gossling et al., 2021; Page et al., 2006).

Greece, a country in which tourism contributed to its GDP by 20.8% in 2019 and by 30.9% in 2018, was one whose economy and unemployment rates were most affected by the suspension of tourism activities. According to SETE, Greece recorded 34 million arrivals of tourists in 2019 and revenues of 18,178 billion from tourism, whilst the country suffered from both the restrictions and the feeling of risk leading to many cancellations resulting in the closure of the majority of tourism enterprises. Until the summer of 2020 Greece had managed to cope well with the confirmed cases of the pandemic as, until 20 June, the number of cases and deaths related to Covid-19 was much lower than that of the competing countries in the Mediterranean (Pappas & Glyptou, 2021). Still, the lack of positive news regarding the manufacture of a vaccine, together with the spread of news and photos of high numbers of cases in other countries, and in general globally, combined with many flight cancellations, created a feeling of doubt and lack of safety among travellers, even though the lockdown had already ended on 4 May 2020. Following that, between 13 November 2020 and 14 May 2021 a second lockdown was imposed in the country; however, the measures were not as strict as the ones of the first lockdown, and some measures were recalled during the period December–January 2021.

2 Literature Review

2.1 *Perceived Risk*

Although the perceived risk has been thoroughly studied in tourism literature, even today it remains an ambiguous concept as different researchers have occasionally attributed to it several definitions (Sjöberg, 1980; Yang & Nair, 2014). Risk has been defined as the possibility to reach a negative outcome and suffer losses (Pizam et al., 2004). The perceived risk relates to a predefined opinion that a person may have regarding a destination or an activity, which affects the person's travel behaviour (Mansfeld, 2006; Silva et al., 2010). The possibility of a wrong choice of destination or activity also constitutes a perceived risk for tourists (Fuchs & Reichel, 2004). The concept of risk is defined in a similar way by Reisinger and Mavondo (2005) who explain that it is with regard to the perception of uncertainty and negative consequences every time that a product or service is purchased. It is, therefore, obvious that the concept of perceived risk is closely related to worries and fears and the biggest challenge for researchers is not just defining the term, but managing to measure it. A number of researchers have claimed to have measured the perceived risk, whereas in fact they measure fear or uncertainty (Korstanje, 2009; Quintal et al., 2010). If the possibility of a negative result indeed exists and can be measured (Korstanje, 2011), then we are actually referring to perceived risk, whereas in the case that the above possibility only exists in our minds, then we are referring to perceived uncertainty. According to the above, the case of Covid-19 and the travel behaviour related to it are a clear case of perceived risk, as there is indeed an existing risk that can be measured based on the number of known cases per area and on the official announcements as to the way that the virus is spread.

At this point the concepts between risk and fear have to be distinguished. According to Yang and Nair (2014), the concepts of risk and fear are different as the first arises from the existence of a fact and the latter from some object. In both cases, however, the final feeling that arises is anxiety. In the case of tourism, during the pandemic the possibility of exposure to the virus (fact) creates the feeling of risk, whereas the interaction with other tourists or local residents (object) creates the feeling of fear (Ioannidis, 2021). Consequently, the feeling of anxiety is what is finally created, which is the stimulus that urges people to change their behaviour in order to protect themselves (Yang & Nair, 2014).

During the pandemic, three factors shaped the environment, in which the perceived risk for tourists was developed: first of all, while writing this research the pandemic is still ongoing, and it is not an issue of the past that would allow it to become a memory; second, crowdedness is a typical situation in modern times both in places of residence and in tourist destinations; and third, there is a lot of information on the possible serious consequences of this disease (Li et al., 2020). In such an environment, it is not surprising that the perceived risk is more developed among tourists, leading to a change in their behaviour. Based on the above and according to Li et al. (2020), people

were faced with six different perceived risks, namely health risk, psychological risk, social risk, performance risk, image risk, and time risk.

2.2 Decision Factors

Nowadays travellers consider several attributes when making their travel plans, especially within and in the post-Covid-19 era. When travelling, behaviour can be broadly affected by socioeconomic characteristics, demographics, and spatial development patterns and policies, which directly or indirectly have an impact on travel thinking, as well as national cultures or individual preferences (Shravani Sharma, 2019). In general, the above-mentioned behaviours affect both tourism and the majority of all support sectors of tourism. In other words, the above factors have an impact on both travel and consumer behaviour.

Decision-making processes in fact include a series of decisions that each traveller needs to make directly after the first decision to leave for holidays. The above decisions are all related to travelling parameters, such as the choice of the destination, the accommodation, the period during which the travel is to take place, the financial parameters, and much more (Ritchie and Filiautault, 1980). To measure the above parameters and to make decisions, travellers need a series of information (Maser & Weiermair, 1998) as they are called to select between a great number of different choices. The choice of a destination plays a major role in all the above decisions, as it also determines the level of uncertainty, according to the alternatives offered by each destination, in all subsequent decisions that need to be taken (Fodness & Murray, 1997). It is, of course, understood that during the pandemic and the change of normality in all destinations, uncertainty was the prevailing feeling for all decisions that travellers were called to make. As a result, the search for information that would determine the decisions to be made became more intense than ever before. Considering that reliable information plays a major role in decision-making, there is still the subjective evaluation of each individual person as to which information is considered reliable (Dreyer, 1996), and all destinations tried to provide sufficient public information regarding the services they provide and the special hygiene protocols that need to be respected and “promised” holidays with the minimum possible risk.

2.3 Travel Behaviour and Demographic Details

The correlation between demographic characteristics and travel behaviour has been an object of the researchers’ community for a very long time. During the pandemic, the above relation was studied by Parady et al.(2020), who confirmed the correlation between sex and behaviour of the residents of Japan regarding self-isolation, leaving home, going out for a walk or for shopping as well as for entertainment purposes.

Moreover, Hotle et al. (2020) confirmed the above finding and concluded that men felt the risk of the pandemic to a lesser extent and as a result the change in their behaviour was not as intense as is the case with women. Irawan et al. (2021) reached the same conclusion in their study regarding the behaviour of the residents of Indonesia. The above findings are aligned with previous studies (Davidson & Freudenburg, 1996; Gustafson, 1998), which argued that men were in general less worried than women about a particular situation. This can be attributed to the traditional role of women as the persons that take care of others and give life, a fact that results in women having a more intense feeling of risk in several situations. With respect to age, it has been highlighted that during the pandemic the perceived risk increases as age increases (Neuburger & Egger, 2020), as was also the case during the previous health crises, e.g. with the SARS virus (Brug et al., 2004).

An interesting finding is the relation between the place of residence and the change in travel behaviour during the pandemic, as this is a factor that has not been thoroughly examined compared to other demographic factors and constitutes the object of the present study. Hara and Yamaguchi (2021) ascertained that there are differences in the travel behaviour of the residents of Japan depending on the region in which they live. They observed that during the recommendation for self-isolation in Japan, travelling was reduced more among the residents of the country's big urban centres, while the areas in the province did not record any similar reduction. Moreover, the big urban centres were not chosen as destinations. Couto et al. (2020) identified some changes in the behaviour of the residents of the Azores islands, where three geographic groups were created: the East, the Central, and the West. A comparison of the above groups in pairs revealed that the residents of the East group showed a higher compliance with the health protocols regarding travelling, as this geographic area has suffered more from the pandemic. What is evident from the aforementioned studies is that the residents in areas that have suffered more from the pandemic have changed their travel behaviour and seem to have developed a more intense feeling of risk.

Still, there is an important gap in literature regarding the study of the change in travel behaviour during the pre-Covid and post-Covid era depending on the place of residence. This research attempts to cover this gap by conducting a case study in Greece, a country that has thirteen regions with significantly different profiles both demographically and geomorphologically. The objective of this study is to sketch the effect of the pandemic on the travel behaviour of the residents of Greece in the post-Covid-19 era. Besides region of residence, this study also examines the correlation of further demographic characteristics with the change in the travel behaviour of the Greeks on a nationwide level (Fig. 1).

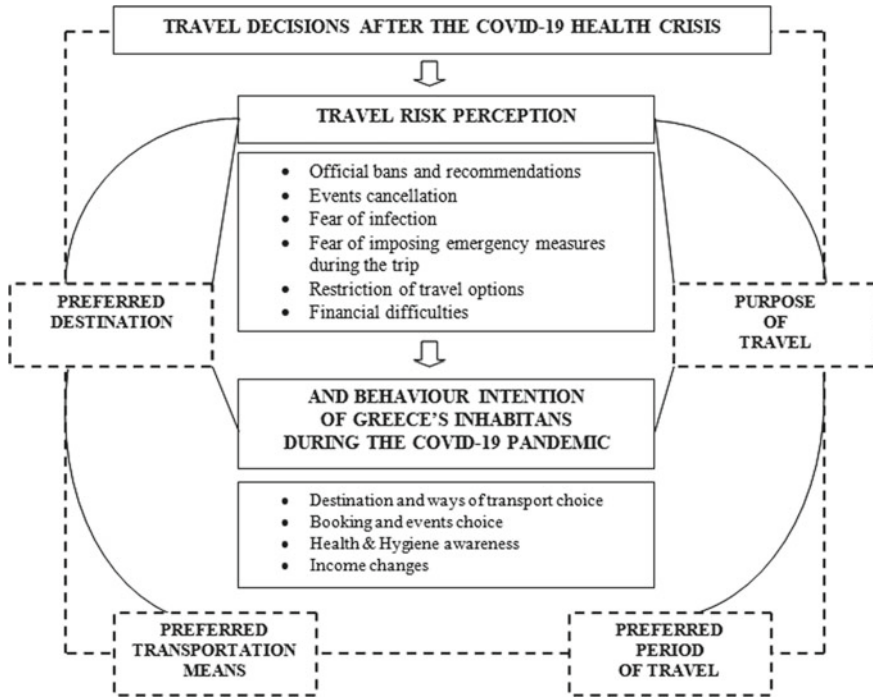


Fig. 1 Theoretical implication of the study

3 Methodology

3.1 Sampling Method

The purpose of this study is to research the changes in the travel behaviour of the Greeks during the pandemic and in the post-Covid-19 era according to their geographic area of permanent residence and their demographic characteristics.

The research null hypotheses that this study tests are the following:

H1: The factors that influenced the decision of the Greeks to postpone/cancel planned trips during the Covid-19 pandemic are not independent from the region of their permanent residence.

H2: The factors that influenced the decision of the Greeks to postpone/cancel planned trips after the Covid-19 pandemic are not independent from the region of their permanent residence.

H3. There is a relationship between the extracted components related to Greek's Travel behaviour in the post-pandemic era and the demographic characteristics of the respondents.

The empirical research of this study was conducted among inhabitants of Greece. Given, however, that Greece's population is not very homogenous, in order to increase

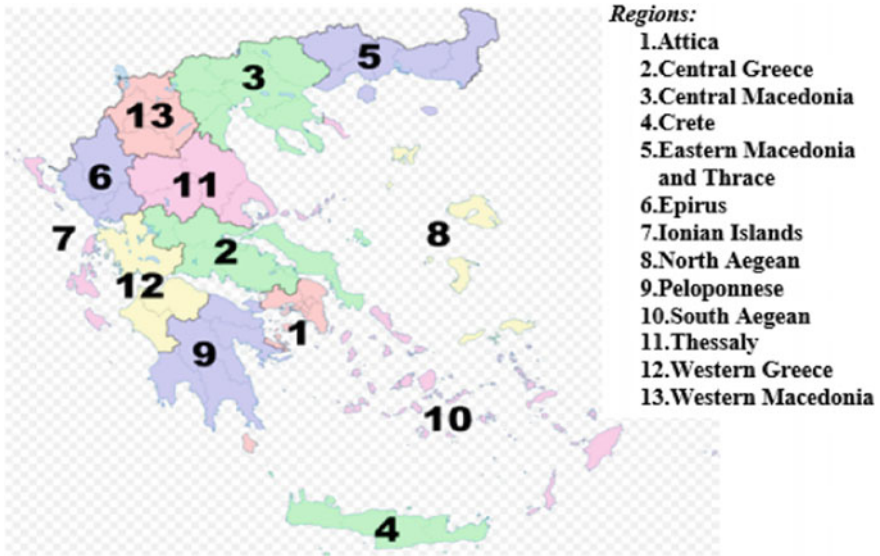


Fig. 2 Map showing modern regions of Greece

the accuracy of the results without increasing the cost of sampling and to improve the representativeness of the sample, a stratified random sampling was used, in which Greece’s thirteen regions were regarded as strata. (Fig. 2). An appropriate sample was collected from each region by means of proportional stratified random sampling. Each member of the study population is assigned to a group or stratum, and then, a simple random sample is selected from each stratum (Gary, 2016).

The proportional allocation formula was used to calculate the samples of each region.

$$\frac{n_i}{N_i} = \frac{n}{N} \Rightarrow n_i = n \frac{N_i}{N}, i = 1, 2, \dots, k$$

The sample size n_i from a stratum is proportional to the percentage of population units represented by that stratum. An online questionnaire has been used to obtain quantitative data, related to persons over 18 years old. A structured questionnaire was used, which included mostly multiple-choice questions as well as five-scaled questions. Open-ended questions were also used as they were considered necessary for the gathering of free-form information (Javeau, 2000). The questionnaire is divided into three sections. The first section aims to obtain information about the travel behaviour of the Greeks during the Covid-19 pandemic. The second section collects information about the travel behaviour after the end of the lockdown imposed due to the Covid-19 pandemic. The third section gathers information about the socio-demographic factors which were gathered, including gender, age, educational level,

annual income, marital status, occupation, and home province, since previous literature has shown that personal factors influence tourist behaviour (Sánchez-Pérez et al., 2021). A pilot survey was conducted among 50 persons, as piloting can help both with the wording of question sequences and the reduction of non-response rates (Oppenheim, 1992). The main survey was conducted between 10 February and 10 March 2021. The reliability of the Likert variables was controlled Cronbach's alpha, which is a suitable method that can be used for Likert scale items. (Ercan et al., 2007). The coefficient of reliability of the alpha Cronbach questionnaire was calculated and equaled 0.886, which means the results of the questionnaire were extremely reliable (Bonett & Wright, 2015).

3.2 Data Analysis Methods

Statistical analysis was performed using SPSS Statistic 26.0. Descriptive statistics were calculated for all the questions of the questionnaire, focussing on creating frequency tables, which are necessary for extracting quantified data. A chi-square test was used to examine the significance of the differences between two separate samples regarding some particular characteristics, as the main prerequisites for the use of this test are fulfilled. Principal components and factor analyses (through a varimax rotation) were used primarily as a tool for reducing the number of variables or examining patterns of correlations among variables. Pearson correlation coefficient (PCC) was applied in order to present the direction of a relationship between two variables X and Y. Pearson's r is a statistic measure based on the method of covariance. A coefficient value of -1 indicates a total negative linear correlation, while $+1$ displays a total positive linear correlation.

4 Results

4.1 Demographic Profile of the Respondents

Of the 2502 respondents who participated in this study, relating to gender, 58.1% were female ($n = 1454$), and 41.1% were male ($n = 1,029$). Most of the participants were aged between 18 and 45 years old (72.5%), and regarding educational level, the majority of respondents (47.2%) held a university degree. With regard to the occupation, the majority are employed in the private sector (33.3%), 20.1% declared that their occupation is related to the tourism industry and considering their annual income, and 33.4% of the participants admitted earning less than €5000.

4.2 Reasons for Covid-19-Induced Travel Cancellation/Postponement

The majority of the inhabitants in each region, i.e. a percentage between 44.0 and 63.8%, had to cancel or postpone a scheduled trip of at least one overnight stay due to the Covid-19 crisis. Percentages higher than 60% were recorded both in some mainland and in some islands and, in particular, in the regions of Central Greece, North Aegean, and Thessaly (Fig. 2). Accordingly, the percentages of inhabitants per region, who did not cancel any of their trips, range between 17.9 and 30.3%. The use of the chi-square test revealed that the decision to cancel or postpone a trip is related to the region of permanent residence of the respondents ($X^2 = 38.042/df = 24/p = 0.000$).

The main reason for the cancellation or postponement of a scheduled trip was with regard to the official prohibitions/recommendations by the state authorities for all the regions of the country, with their percentage ranging between 28.6% for the Ionian Islands and 45.7% for the Region of West Macedonia and Thrace (Table 1). This was followed by the fear of contamination from the virus ranging between 17.1% in West Greece and 27.5% in Central Greece. The remaining factors account for much smaller percentages, with the factor of financial difficulties being the last one on the list (0.9–11.3%). Regarding the first research hypothesis of this research, the use of the chi-square test revealed that it is correlated with the region of permanent residence ($X^2 = 48.056/df = 24/p = 0.002$), and consequently, H1 is to be accepted.

4.3 Travel Plans After the Covid-19 Era

In regard to H2, a chi-square analysis was conducted to explore the correlation between the travel parameters and region of residency. The analysis showed (Table 2) that most of the respondents plan to travel in 2021 (67.7%), mostly by airplane (37.8%). The main reason of this particular trip is pleasure/holidays (57.0%) to a destination in Greece, regardless how far away (53.1%) during the summer of 2021 (57.1%). As regards the examination of the relevant correlation, the chi-square test used revealed that all the above parameters are related to the region of permanent residence of the Greeks, and H2 is, thus, to be accepted.

4.4 Factors Influencing Travel Intentions by Demographic Characteristics

Aiming to test H3, a principal component analysis (PCA) was applied in order to categorise the influencing factors. PCA was conducted in order to segment twenty-two variables related to their travel behaviour after the Covid-19 lockdown into

Table 1 Association between region of permanent residence and reasons for cancellation or postponement of travel during the pandemic

Reasons for cancellation or postponement of travel during the pandemic									
Region	Official bans/ recommendations	Cancellation of scheduled events	Fear of infection	Feeling uncertain	Restriction of travel options	Fear of imposing emergency measures during the trip	Financial difficulties		
	(%)								
Eastern Macedonia and Thrace	45.7	9.5	22.4	3.4	8.6	9.5	0.9		
Central Macedonia	39.0	5.4	19.7	6.6	10.9	14.6	3.9		
Western Macedonia	39.4	7.0	21.1	2.8	5.6	12.7	11.3		
Epirus	41.9	7.0	18.6	3.5	11.6	14.0	3.5		
Thessaly	42.9	11.1	18.7	4.5	10.1	8.6	4.0		
Central Greece	32.6	4.3	27.5	8.0	5.1	17.4	5.1		
Western Greece	32.9	7.6	17.1	6.5	16.5	14.1	5.3		
Ionian Islands	28.6	1.6	23.8	11.1	7.9	20.6	6.3		
Peloponnese	37.8	6.3	18.0	8.1	9.9	12.6	7.2		
Attica	35.2	7.2	20.6	7.0	13.3	11.7	5.0		
North Aegean	29.1	9.1	23.6	9.1	14.5	10.9	3.6		
South Aegean	39.5	8.6	18.5	12.3	7.4	6.2	7.4		
Crete	40.2	8.7	20.5	3.9	8.7	13.4	4.7		
Greece (Total)	37.1	7.1	20.4	6.6	11.4	12.5	4.8		
<i>Chi-square test</i> ($X^2 = 48.056/ df = 24/p = 0.002$)									

Table 2 Association between region of permanent residence and travel decisions after Covid-19 health crisis

Decisions	(%)	Chi-square test
<i>Do you plan to travel in 2021?</i>	67.7	$X^2 = 43.748/df = 24/p = 0.008$
• Yes	8.7	
• No	23.6	
• I'm not sure yet		
<i>If yes, which transportation means do you plan to use?</i>	37.8	$X^2 = 167.039/df = 48/p = 0.000$
• Airplane	29.5	
• Ship	26.6	
• Private vehicle	5.2	
• Public transportation	1.0	
• Combination of transports		
<i>What is the purpose of your first travel after the lifting of the lockdown?</i>	9.6	$X^2 = 73.638/df = 48/p = 0.010$
• Business	57.0	
• Pleasure	29.6	
• Family	2.7	
• Educational	1.2	
• Health		
<i>If you are planning a pleasure trip after the lifting of the lockdown, where do you intend to travel to?</i>	26.0	$X^2 = 128.713/df = 60/p = 0.000$
• To my home country and close to the area I live in	14.1	
• To my home country, close to the area I come from	53.1	
• To my home country, either close or far	8.0	
• Abroad, but not too far away	11.8	
• Abroad, either close or far	1.0	
• Other		
<i>If you are planning a pleasure trip after the lifting of the lockdown, when do you intend to travel?</i>	9.0	$X^2 = 121.888/df = 60/p = 0.000$
• In the spring of 2021	57.1	
• In the summer of 2021	8.0	
• In the autumn of 2021	2.9	
• In the winter of 2021	3.4	
• In 2022	19.6	
• I don't know yet		

four principal factors which depict their travel intentions for the post-pandemic era (Table 3). The Kaiser–Meyer–Olkin measure of sampling adequacy (0.882) and Bartlett's sphericity test statistic (0.000) supported the implementation of the PCA technique. A varimax with Kaiser normalisation rotation method was applied to categorise each item as a correlate variable with high loading on only one component. Four components of travel behaviour were extracted, which explain 58.6% of the total variance of those travel intentions. The rotation sums of squared loadings presented that the first factor called: "options related to destination and choice

of transport” accounts for 30.5% of variance. The second factor named: “options related to booking and choice of events” accounts for 15.2%. The third factor titled: “options related to health and hygiene issues” accounts for 6.7%, and the last factor named: “options related to income changes” expresses 6% of the variance. A reliability analysis was applied to explore the internal consistency of the overall scale. Cronbach’s α (or coefficient alpha) was used as a measure to explore if the five-point Likert scale question of the surveys is reliable. A “high” alpha value (over 0.70) is usually acceptable. While many authors considered that values higher than 0.80 are more appropriate for the reliability analysis. Cronbach’s alpha statistic showed the reliability for each of one of the above-mentioned components measurement scale (values higher than 0.80).

Pearson correlation coefficient (PCC) was applied in order to show the direction of a relationship between the extracted components derived from the factor analysis and the socio-demographic characteristics of the respondents (i.e. region, educational level, age, and marital status) (Table 4).

There is a statistically significant positive relationship between options related to destination and ways of transport and the educational level of the respondents ($r = 0.10/df = 2.500/p < 0.001$), and statistically significant negative relationship between options related to destination and ways of transport and age ($r = -0.13/df = 2.500/p < 0.001$) and the marital status of the respondents ($r = -0.15/df = 2.500/p < 0.001$). A statistically significant positive relationship between options related to booking and events and the educational level of the respondents ($r = 0.11/df = 2.500/p = 0.038$) as well as a statistically significant negative relationship between options related to booking and events and the region ($r = -0.04/df = 2.500/p < 0.001$) and the marital status of the respondents ($r = -0.06/df = 2.500/p < 0.001$) is also observed. A statistically significant positive relationship between options related to health and hygiene issues and the age ($r = 0.13/df = 2.500/p < 0.001$) and the educational level of the respondents ($r = 0.13/df = 2.500/p < 0.001$) and a statistically significant negative relationship between options related to health and hygiene issues and the marital status of the respondents ($r = -0.16/df = 2.500/p < 0.001$) can be also derived from the analysis. Finally, a statistically significant negative relationship between options related to income change and the age of the respondents ($r = -0.04/df = 2.500/p = 0.014$) is also noted.

5 Discussion

The present findings confirmed that today’s booking decision is being made in a completely different way, as the top priority for the modern-day consumer concerns safety and trust (Embre, 2020). Hence, this result ties well with previous studies (Chembli & Ben Said, 2020) wherein travellers are concerned about health and hygiene awareness (i.e. cleanliness of airports, public spaces, hotels, tourist attractions, quality of the care offered, by the destination, etc.), while health standards and protocols become significant factors that influence the travel decision. Hence,

Table 3 Greece's inhabitants travel behaviour components

	Components				Mean	SD
	1	2	3	4		
Options related to destination and choice of transport					2.39	0.921
I will avoid air travel	0.786				2.01	1.167
I will avoid sea travel	0.748				1.94	1.115
My desire for travel has diminished	0.617				1.90	1.206
I will choose destinations in the countryside and not in urban centres	0.614				2.73	1.348
I will choose special and alternative forms of tourism	0.597				2.46	1.302
I will choose less popular destinations	0.580				2.79	1.381
My options of destinations have decreased	0.578				2.60	1.354
I will choose to travel during low season to avoid overcrowding	0.571				2.72	1.360
Options related to booking and choice of events					2.64	0.938
The resumption of cultural events will affect my travel behaviour		0.818			2.67	1.368
The resumption of business events will affect my travel behaviour		0.803			2.44	1.346
The resumption of sporting events will affect my travel behaviour		0.763			2.34	1.401
The reopening of hotels and tourist offices will affect my travel behaviour		0.707			3.09	1.391
The resumption of air travels will affect my travel behaviour		0.653			2.86	1.408
The effective operation of online booking platforms will affect my travel behaviour		0.481			2.51	1.264
Having a voucher for cancelled travel will affect my travel behaviour		0.469			2.34	1.401
Having a health passport will affect my travel behaviour		0.439			2.85	1.469
Options related to health and hygiene issues					3.09	1.115
I will only select health certified providers			0.813		3.02	1.401
I will only select destinations with health protocols			0.801		3.29	1.366
I will only select health certified providers of transportation			0.800		2.90	1.353
Applying a Covid-19 vaccine will affect my travel behaviour			0.464		3.17	1.451
Options related to income changes					2.83	1.319
Changes in family's income				0.843	2.86	1.406

(continued)

Table 3 (continued)

	Components				Mean	SD
	1	2	3	4		
Changes in personal income				0.842	2.81	1.430
KMO	0.882	Bartlett's test of Sphericity				0.000
Eigenvalues	6.709	3.357	1.488	1.334		
Variance explained (%) (Total)	30.495	15.259	6.762	6.065	(58.581)	
Cronbach's alpha (Total)	0.866	0.832	0.814	0.844	(0.886)	

* Variables were measured on a 5-point scale, where 1 stands for “Strongly Disagree”, and 5 stands for “Strongly Agree”

Table 4 Pearson correlations

		Region	Educational level	Age	Marital status
Options related to destination and ways of transport	Pearson correlation	- 0.001	0.107**	- 0.132**	- 0.154**
	Sig (2-tailed)	0.966	< 0.001	< 0.001	< 0.001
Options related to booking and events	Pearson Correlation	- 0.042	0.113**	- 0.064**	0.019
	Sig (2-tailed)	0.038	< 0.001	0.001	0.345
Options related to health and hygiene issues	Pearson Correlation	- 0.024	0.130**	0.134**	- 0.160**
	Sig (2-tailed)	0.235	< 0.001	< 0.001	< 0.001
Options related to income changes	Pearson Correlation	- 0.023	- 0.008	- 0.049*	- 0.012
	Sig (2-tailed)	0.249	0.671	0.014	0.539

*Correlation is significant at the 0.05 level (2-tailed)

** Correlation is significant at the 0.01 level (2-tailed)

modern-day visitors adopt new consumer practices and trends, such as: more last-minute reservations and more concern for hygiene protocols (Hystad & Keller, 2008), more attention to ecotourism (Higgins-Desbiolles, 2020), more contact with outdoor activities (Huang & Min, 2002), and more interaction with community events, as their socioeconomic impact could provide long-term benefits for local societies and contribute to the local tourism development, by improving revenues, supporting the local economies, and using the existing infrastructures (Mouratidis, Doumi & Thanopoulos, 2020). Contrary to the findings of Chembli and Ben Said (2020), who recognised that the Covid-19 pandemic did not have an impact on people’s desire to travel away from home and continue exploring across borders. The results of this survey suggest that Greece’s inhabitants in the future will choose (mainly country’s destinations) or a destination closer to their own region/residence. Additionally, the findings of the study, which reveals that Greece’s inhabitants prefer to travel during

low season, as well as to less popular tourism destinations in order to avoid overcrowded spaces, are in accordance with the ideas of Chembli and Ben Said (2020). Extensive results also presented that socio-demographic characteristics of visitors including age, educational level, and income revenue were found to affect the choice of people who go on vacations (Torres-Sovero et al, 2012).

Regarding the perceived risk and uncertainty, this research reveals that in 2020 Greece's inhabitants showed a low perceived risk for the severity of Covid-19, as only 1 out of 5 Greeks (20.4%) did cancel a planned trip due to the fear of being exposed to the virus. With respect to the travel behaviour over the next season (summer 2021), the willingness to travel characterises the majority of the inhabitants (67.7%), a fact indicating low uncertainty. This research is the first one, according to our knowledge, that makes a quantitative separation of the above two feelings and reveals that the Greeks portray a low level of perceived risk and uncertainty in their travel behaviour regarding the virus, both during the pandemic and in the post-Covid era.

6 Conclusions, Limitations, and Recommendations for Future Research

Taking into consideration that the pandemic has affected travel intentions and that is extremely difficult to predict the behaviour of tourists following a crisis (Vo Than, 2006), this survey aimed to provide a panorama of the changing behaviour of travellers in the context of tourism development, which will be at risk and the need to quickly overcome the Covid-19 health crisis. The findings of this study are directly in line with prior studies, which recognised the sensitivity of tourists to crises. The global panic caused by Covid-19 lead tourists to consider the issue of health and hygiene for their future travels. Hence, modern-day tourism businesses (i.e. accommodation, transport, catering operations, etc.) need to improve their hygiene conditions and adopt strategies and measures that will satisfy the new travel habits. Broadly translated the results of this work indicate that, after the first signs of return to normalcy, Greece's inhabitants tend to prefer travelling during the low season and avoid visiting well-known tourism destinations. In fact, for the next phase of the Covid-19 outbreak, Greece's residents expressed a willingness to continue travelling are motivated to travel mainly within Greece/their country, while choosing a destination close to their region can also be concluded from this survey.

An apparent limitation of this study is that some answers in the questionnaire may not express the true beliefs and perceptions of Greece's inhabitants due to the fact that the distribution of questionnaires was via an online platform. In fact this limitation exists in most online surveys. Nevertheless, the significance of this work is unquestionable, as authors tend to explore the attitudes and travel intentions of Greece's inhabitants in the post-pandemic era, by collecting a notable number of answers from residents of each region of Greece, during the lockdown period.

In addition, future studies could fruitfully explore the basis provided from the current analysis and investigate this issue further by understanding the influence of the Covid-19 crisis on the travel plans and behaviour of the local population. Future work, investigating intentions regarding behavioural changes of travellers in relation to a specific context or/ and comparison (i.e. region to region, mainland to island, island to island destination, mature and “fresh” tourism destination, etc.) might prove important for promotional literature. Additionally, the reasons why the Greeks have shown a low feeling of risk and uncertainty regarding Covid-19 can be examined in terms of future studies and investigate their trust in health protocols, perceptions of the danger of the virus, and other factors. The above factors played an important role in shaping the behaviour described in this research. Finally, future research should also examine strategically the internal factors that defined travel behaviour, such as the socio-demographic characteristics of the inhabitants—respondents (i.e. age, place of permanent residence, income, educational level, income revenues, etc.), as this type of exploration tends to enhance the stakeholders efforts to re-build the image of the destination and regain customers loyalty.

Finally, the authors of this study suggest a follow-up on possible long-term behavioural changes according to the findings in this paper. The main question for future research is: are behavioural changes temporary or permanent?

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Intellectual Capital and Customer Satisfaction at Northern Portugal and Galicia Hotels



Helena Santos-Rodrigues

Abstract This research paper delves into the relationship between intellectual capital (IC) and customer satisfaction in hotels located in Northern Portugal and Galicia (northern Spain). The primary objective was to identify the key aspects of intellectual capital that significantly impact customer satisfaction, ultimately providing hotel facilities with valuable insights to enhance their performance. The study encompassed 239 hotel units, distributed across various star categories, from one two-star to five-star establishments. The study considered all dimensions of the three capitals (Human, Structural, and Relational) as independent variables, and the online ratings; of the selected hotels on www.booking.com; served as the dependent variable. The findings indicate that the dimensions of knowledge creation and development (structural capital), training and knowledge creation (human capital), relationship with stakeholders, and collaboration networks (relational capital) collectively contribute to explaining 53% of the variability in customer satisfaction. These results carry significant implications for stakeholders and underscore the organizational responsibility in the hospitality industry. By understanding and focusing on these important aspects, hotels can effectively improve customer satisfaction levels.

Keywords Hotel customer satisfaction · Human capital · Intellectual capital · Relational capital · Structural capital

JEL Classification Z32

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1 Introduction

With the advance of recent technologies and the consequent globalization, knowledge has become a key element in the competitiveness of organizations operating in an increasingly demanding market. In this sense, this study aims to examine the relationship between intellectual capital and hotel customer satisfaction in the regions of Porto and Northern Portugal (Portugal) and Galicia (Spain).

It is widely accepted that in an organization there are several types of strategic intangible assets, so these must be categorized considering the logic of management: If two intangible resources require different management actions, they must belong to various categories (Bontis et al., 1999). In this sense, the consideration of three intellectual types is widely accepted: HC; SC, and RC (C.I.C. & I.A.D.E.-C.I.C., 2003; Edvinsson & Malone, 1997; Roos et al., 1997; Saint Onge, 1996; Stewart, 1998).

Therefore, we analyzed the various dimensions human capital (HC), structural capital (SC), and relational capital (RC) of intellectual capital in hotels in the selected regions and, using a statistical model to evaluate the existence (or not) of a relationship between intellectual capital and an indicator of customer satisfaction. Specifically, we aimed to find the determining aspects of intellectual capital in customer satisfaction, providing hotel facilities with ways to improve and enhance their results. We studied 239 hotel units, 19 in the one-star category, 66 two-star, 70 three-star, 69 four-star, and 15 five-star.

2 Literature Review

Today organizational knowledge is the most essential and strategic factor of production (Spender & Grant, 1998), a critical resource (King & Zeithaml, 2003), which helps create and sustain competitive advantages. In fact, companies believe that knowledge makes value (Stewart, 1998). It builds its competitive advantages by integrating, building, and reconfiguring packages of resources, capabilities, and environments to generate customer value. The way to generate more value for the organization varies in different cases, but customer satisfaction is essential (Tece et al., 1997).

Intellectual capital refers to the intangible assets of an organization, including its knowledge, expertise, and intellectual property. IC is increasingly seen as a source of competitive advantage that leads to superior returns (Peteraf, 1993), and it is more sustainable (Davenport & Prusak, 1998) because the more the firm knows, the more it can learn (Cohen & Levinthal, 1990). Research finds that IC is the basis of competitive advantage (Davenport & Prusak, 1998) and fosters customer satisfaction (Kövesi et al., 2012).

The influence of intellectual capital on customer satisfaction can be significant. A study by Wang et al. (2012) in the field of IT industry found that intellectual

capital positively influences customer satisfaction through its impact on innovation capability. As well Bontis and Fitz-enz (2002a, 2002b) discuss the causal relation between human capital (a component of intellectual capital) and several outcomes, including customer satisfaction. The article suggests that investments in human capital, such as training and knowledge transfer, can enhance employees' abilities to serve customers effectively and contribute to higher levels of satisfaction. Research by Chen et al. (2005) explores the relationship between intellectual capital and financial performance. While it does not directly examine customer satisfaction, it highlights the value of intellectual capital in enhancing overall firm performance, which can indirectly impact customer satisfaction.

Literature considers typically three main components of intellectual capital.

Human capital refers to the collective knowledge, skills, expertise, and capabilities of an organization's workforce, which can be harnessed and leveraged to drive organizational performance, innovation, and competitive advantage (Bontis & Fitz-enz, 2002b; Davenport et al., 2003; Edmonson, 1999; Edvinsson & Malone, 1997).

Structural capital: SC encompasses the organizational infrastructure, processes, and systems that support the efficient and effective operation of the business. This includes patents, trademarks, databases, proprietary technology, organizational culture, and other intangible assets that contribute to the organization's productivity and performance. SC is the intangible assets of an organization embedded in its systems, processes, and structures. It encompasses the organizational infrastructure, intellectual property, databases, software, patents, trademarks, and other non-human elements that contribute to the organization's performance and value creation (Edvinsson & Malone, 1997; Youndt et al., 2004). While structural capital is a key component of intellectual capital and organizational performance, its direct link to customer satisfaction may not have been extensively studied in specific terms. However, there are some related concepts and studies that provide insights into how structural capital can indirectly influence customer satisfaction.

Relational capital refers to the value derived from the relationships an organization has with its customers, suppliers, partners, and other external stakeholders. Strong customer relationships, brand reputation, and strategic alliances are examples of relational capital. Rastogi (2003) considers as sources of knowledge production alliances, joint ventures, patent licensing, transfer/exchange of knowledge and sales experiences, consulting services, and the acquisition of organizations with complementary skills of high quality. Payne et al. (2008) discuss the concept of value co-creation, which involves collaborative efforts between organizations and customers. Relational capital enables effective co-creation of value and can contribute to customer satisfaction.

The hotel industry is a key sector within the tourism industry and faces more intense global competition than other supply industries (Nunkoo et al., 2020). So, in hospitality, achieving and maintaining customer satisfaction is one of the greatest contemporary challenges faced by management in service industries (Su, 2004). Then hospitality companies must focus on the guest experience and organize memorable experiences that stimulate the five senses, and hospitality organizations that are

able to capture this sense of theater and generosity will gain a competitive advantage by providing their guests with experiences that are personal, memorable, and add value to their lives (Hemmington, 2007). Providing quality service increases customer satisfaction, and satisfaction is a decisive incentive for better labor practices (Ramsaran-Fowdar, 2007).

As Radojevic et al. (2015) point out one of the most prevalent methods used by customers is to provide online feedback on his or her satisfaction with the services provided and seek information for reservations. In the process of consumers' lodging decision-making, online reviews have emerged as one of the most crucial sources of information (Ye et al., 2009). These reviews serve as a form of electronic word of mouth (eWOM), which refers to all informal communications directed at customers through Internet-based technology. This communication is related to the usage or characteristics of specific products and services, as well as their providers (Litvin et al., 2008).

The research findings revealed that favorable online reviews have a profound effect on hotel bookings, leading to a considerable increase in reservations. However, the sentiment polarity or variation in these reviews exerted a detrimental influence on the volume of online sales. Specifically, it was observed that a 10% enhancement in reviewers' ratings correlated with a substantial sales boost of 4.4%. Conversely, a mere 10% rise in review variance resulted in a notable decrease of 2.8% in online sales (Ye et al., 2009). Evidence shows customers consider online ratings as a reliable source of information while making choices (Gavilan et al., 2018).

Indeed, attaining exceptional outcomes in an organization requires a well-organized informational communication (IC) system that effectively manages the interplay of its various components. By closely examining specific facets of the IC and their influence on organizational performance, superior results can be achieved (Chen et al., 2005; Tan et al., 2007).

Based on the literature review presented above, we consider that, with the hotel industry strongly supported by human resources, customer satisfaction depends on how the service is provided, providing the various components of the IC with significant importance to obtain that same satisfaction. Several studies have confirmed consistent links between organizational performance and IC components (Bontis, 1998; Marr & Schiuma, 2001). In this line, focusing our research on the components of IC, we propose the following hypothesis:

Hypothesis 1: HC is Positively Related to Customer Satisfaction.

Regarding structural capital, Bontis (1999) contends that it encompasses knowledge that has been internalized through the organization's routines, mechanisms, processes, and means, with the goal of enhancing intellectual performance. The organization strives to enhance its structural capital by harnessing both the tacit and explicit knowledge of employees, along with comprehensive information about customers and competitors (Santos-Rodrigues et al., 2011). Edvinsson and Malone (1997) conceptualize structural capital (SC) as the infrastructure that aggregates and supports human capital (HC) and the system that disseminates and maintains the intellectual assets of an organization. According to Cabrita and Bontis (2008), SC

is generated by HC, and an organizational base system is essential for its effective utilization. Stewart (1998) argues that an organization can only have a high SC in the future if it currently possesses a large HC and vice versa. However, the relationship between structural capital and customer satisfaction is not extensively explored in academic literature. A vital aspect of the organization's knowledge of its customers is their satisfaction. Thus, we propose our second hypothesis:

Hypothesis 2: SC is Positively Related to Customer Satisfaction.

A strong foundation of relational capital is established through a positive reputation, substantial experience, and well-established personal networks (Teece, 2012). As for the RC, Prahalad and Ramaswamy (2004) suggest that the customer has become a new way to gain competitive advantage for the organization. It is in this logic that we formulate our latest research hypothesis:

Hypothesis 3: RC is Positively Related to Customer Satisfaction.

The acceptance of the above three hypotheses provides evidence of the existence of a positive effect of IC on customer satisfaction.

3 Methodology

The methodology used to examine the relationship between IC and customer satisfaction in hotels in Porto/Northern Portugal and Galicia (Spain) was the survey (as in other similar studies, such as Santos-Rodrigues et al., 2011; among others). We use primary data for IC and secondary data for customer satisfaction.

The questionnaire used was already developed in Portuguese and Spanish versions. The questionnaire was previously validated together with five people working in hotel units (companies that were not the object of our study), subsequently was emailed to the hotels, and made a phone call monitoring the receipt of the email, and the response to the questionnaire has sometimes been made by phone. To evaluate HC, 14 items were used; SC that was measured by 18 items, RC by 7 items, all measured on a 5-point Likert scale from 1 "no agreement" to 5 "strongly agree".

Data for this study was gathered from the world's largest third-party hotel booking website, www.booking.com. The Web site only allows reviews from travelers who have actually stayed in the listed hotels, ensuring the authenticity and credibility of the reviews. This research uses the data as a proxy for customer satisfaction based on available data on customer satisfaction¹ with on-site accommodation units Booking.com corresponding to the hotel units surveyed, as was already done in other research focusing on hotel customer satisfaction (Radojevic et al., 2015).

¹ As suggested by some researchers who use this source of information in their research (Mellinas et al., 2015).

To evaluate the different constructs, we will use the principal components technique. To select the number of factors, we consider the Kaiser method and those that explain at least 50% of the total variance (Costello & Osborne, 2005). The degree of validity of this technique is given by two auxiliary instruments: the Bartlett test and the Kaiser–Meyer and Okin coefficient (KMO).

Our study encompasses all hotel units located in Porto, North of Portugal, and Galicia, which are registered in the databases of the competent regional tourism promotion entities. This constitutes a total of 466 study units. The survey was distributed to senior managers of all these units, and we received 239 valid responses after the sample selection process, resulting in a response rate of 51.29%. The sample includes a diverse range of hotels, with 19 in the one-star category, 66 in the two-star category, 70 in the three-star category, 69 in the four-star category, and 15 in the five-star category. For the assessment of customer satisfaction, we analyzed the following criteria: cleanliness, comfort, location, convenience, staff, and quality/price ratio.

Data processing was conducted using the statistical software SPSS version 20.0 for Windows. To describe the sample, we employed descriptive analysis, calculating frequencies, percentages, and averages. Next, for the evaluation of the various constructs, we utilized the principal components technique. Variables with communality values below 0.4 were considered for elimination, as they did not share significant information with the rest of the items.

After reducing the information, we applied the rotation process to adjust the orthogonal varimax relationship between the involved components, ensuring their lack of correlation. The effectiveness of this technique was evaluated using two auxiliary instruments: the Bartlett test and the Kaiser–Meyer and Okin coefficient (KMO). For each aspect, where a single construct was being measured using a set of items, the reliability of the measurement instrument and data collection was established by calculating Cronbach's alpha coefficient (Cronbach, 1951). To examine the relationships between constructs, we employed multiple linear regression techniques to assess and compare the direct effects of each independent variable on the dependent issue.

4 Results

The main components analysis of all items related to intellectual capital (HC) was conducted. The measured Kaiser–Meyer and Okin (KMO) value was 0.892, and Bartlett's sphericity test yielded a p -value of < 0.001 , indicating significant correlations among the variables and justifying the continuation of the factor analysis. The analysis resulted in three factors, collectively explaining 72.195% of the total variance.

The first factor, customer orientation, had an eigenvalue of 7.994, explaining 57.098% of the variance. The second factor, formation and creation of knowledge, had an eigenvalue of 1.104, contributing to 7.888% of the total variance. The third factor, awards and rewards, had an eigenvalue of 1.009 and explained 7.209% of

the total variance. This factor encompassed elements related to financial incentives aimed at enhancing employee satisfaction.

A principal component analysis of the SC was also performed. The KMO test resulted in a value of 0.928, and Bartlett’s sphericity test yielded a *p*-value of < 0.001, indicating a good fit of the data with factorial analytical procedures. The analysis extracted two factors from the SC.

The first factor, organizational climate and culture, had an eigenvalue of 10.320, explaining 57.335% of the total variance. This factor pertained to the work environment, formal and informal relationships, trust, and the policies and procedures that guide employee actions.

The second factor, creation and development of knowledge, had an eigenvalue of 2.071 and contributed to explaining 11.504% of the total variance. The KMO test indicated a composite reliability (CR) value of 0.720, and Bartlett’s sphericity test yielded a *p*-value of < 0.001, affirming the suitability of the data matrix for factor analysis procedures. Together, the two extracted factors accounted for 75.127% of the total variance.

The first of these two factors, stakeholders relationship, had an eigenvalue of 3.673, explaining 52.475% of the variance. It represented the organization’s relationships with various stakeholders, such as customers, suppliers, and allies. The second factor, named network collaboration, had an eigenvalue of 1.586, contributing to 22.652% of the total variance. This factor encompassed relationships with competitors, knowledge institutions, and suppliers, aimed at ensuring customer satisfaction, the RC.

Internal consistency was used to analyze reliability by calculating Cronbach’s alpha statistic. The analysis of the values obtained allows us to ensure that the size scale has a good internal consistency (Table 1).

Human Capital

The awards and rewards and training and knowledge creation factors were the independent variables, and the dependent variable was satisfaction. The final model obtained is shown in Table 2.

The analysis revealed that the variables awards and rewards [$\beta = 0.400, t(236) = 8.710, p < 0.001$] and training and knowledge creation [$\beta = 0.299, t(236) = 6.716, p < 0.001$] are significant predictors of customer satisfaction. The final adjusted model is as follows: Satisfaction = 5.085 + 0.400 awards and rewards + 0.299 training and knowledge creation.

Table 1 Constructs reliability

Constructs	No. of items	Cronbach’s Alpha
Human capital	14	0.928
Structural capital	18	0.952
Relational capital	7	0.821

Source Own elaboration

Table 2 Regression model of human capital and satisfaction

Dependent variable satisfaction	Unstandardized coefficients		t	Sig
	B	Std. Error		
Constant	5.085	0.232	21.884	0.000
Awards and rewards	0.400	0.046	8.710	0.000
Training and knowledge creation	0.299	0.044	6.716	0.000

Note $R^2 = 0.426$; $R_a^2 = 0.421$

The model is highly significant and accounts for a substantial proportion of the variability in satisfaction [$F(2, 236) = 87.568, p < 0.001; R_a^2 = 0.421$].

So, we validate the first hypothesis, confirming that HC is positively related with customer satisfaction.

Structural Capital

In this analysis, the two factors of structural capital were the independent variables, whereas the satisfaction was the dependent variable. The ultimate model is presented below in Table 3.

The multiple linear regression analysis identified the factors “creation and development of knowledge” [$\beta = 0.544, t(236) = 9.407, p < 0.001$] and “climate and organizational culture” [$\beta = 0.199, t(236) = 3.813, p < 0.001$] as significant predictors of customer satisfaction. The resulting regression model is as follows: Customer satisfaction = 4.903 + 0.544 * creation and development of knowledge + 0.199 * climate and organizational culture.

The model obtained is highly significant and explains a reasonable proportion of the variability in customer satisfaction [$F(2, 236) = 87.500, p < 0.001; R_a^2 = 0.421$].

Based on the provided information, the analysis validates the second hypothesis, confirming that structural capital (SC) is positively related to customer satisfaction. The two factors of structural capital (independent variables) have been found to have a positive impact on customer satisfaction (dependent variable), as indicated by the regression model presented in Table 3.

Table 3 Regression model between structural capital and satisfaction

Dependent variable satisfaction	Unstandardized coefficients		t	Sig
	B	Std. Error		
Constant	4.903	0.251	19.524	0.000
Creation and development of Knowledge	0.544	0.058	9.407	0.000
Climate and Organizational Culture	0.199	0.052	3.813	0.000

Note $R^2 = 0.426$; $R_a^2 = 0.421$

Relational Capital

In the current analysis, the two factors of relational capital served as the independent variables, while satisfaction was the dependent variable. The final model is outlined in Table 4.

The multiple linear regression analysis identified the factors “collaboration networks” [$\beta = 0.390, t(236) = 7.553, p < 0.001$] and “relationship with stakeholders” [$\beta = 0.237, t(236) = 3.991, p < 0.001$] as significant predictors of satisfaction. The regression model is given by: Satisfaction = 5.401 + 0.390 * collaboration networks + 0.237 * relationship with stakeholders.

This model is highly significant and explains a moderate proportion of satisfaction [$F(2, 236) = 53.971, p < 0.001; R_a^2 = 0.308$].

The analysis validates the third hypothesis, confirming that relational capital (RC) is positively related to customer satisfaction. The two factors of relational capital (independent variables) have demonstrated a positive impact on customer satisfaction (dependent variable), as evidenced by the regression model presented in Table 3.

The multiple linear regression analysis, utilizing a stepwise variable selection method, was conducted to develop a predictive model for customer satisfaction based on intellectual capital (IC). All dimensions of the three types of IC were considered as independent variables, with customer satisfaction as the dependent variable.

The resulting model exhibited high significance and accounted for a significant proportion of the variability in customer satisfaction [$F(4, 234) = 68.774, p < 0.001; R_a^2 = 0.533$]. Figure 1 presents the final model obtained from this analysis.

The conducted analysis identified four significant predictors of customer satisfaction:

SC: Creation and development of knowledge [$\beta = 0.544, t(236) = 9.407, p < 0.001$].

SC: Climate and organizational culture [$\beta = 0.199, t(236) = 3.813, p < 0.001$].

HC: Awards and rewards [$\beta = 0.400, t(236) = 8.710, p < 0.001$].

HC: Training and knowledge creation [$\beta = 0.299, t(236) = 6.716, p < 0.001$].

RC: Relationship with stakeholders [$\beta = 0.237, t(236) = 3.991, p < 0.001$].

RC: Collaboration networks [$\beta = 0.390, t(236) = 7.553, p < 0.001$].

The regression model is as follows:

Table 4 Regression model between relational capital and satisfaction

Dependent variable satisfaction	Unstandardized coefficients		t	Sig
	B	Std. Error		
Constant	5.401	0.285	18.930	0.000
Collaboration networks	0.390	0.052	7.553	0.000
Relationship with stakeholders	0.237	0.059	3.991	0.000

Note $R^2 = 0.314; R_a^2 = 0.308$

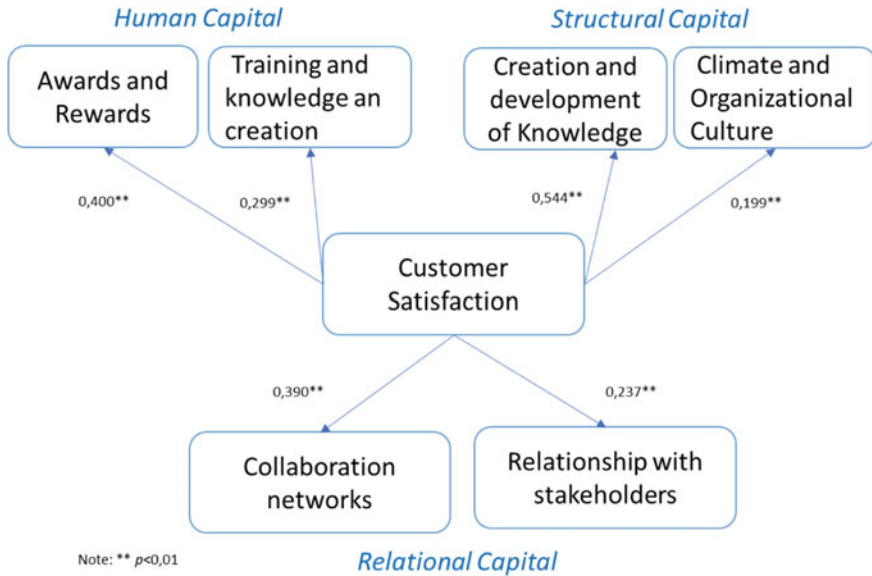


Fig. 1 Final model. *Source* Authors

$$\begin{aligned}
 \text{Customer Satisfaction} &= 4.747 + 0.544 \\
 &\quad * \text{Creation And Development Of Knowledge(SC)} \\
 &\quad + 0.199 * \text{Climate and Organizational Culture(SC)} \\
 &\quad + 0.299 * \text{Training And Knowledge Creation(HC)} \\
 &\quad + 0.400 * \text{Awards and Rewards} \\
 &\quad + 0.237 * \text{Relationship With Stakeholders(RC)} \\
 &\quad + 0.390 * \text{Collaboration Networks(RC)}.
 \end{aligned}$$

These results indicate that the dimensions of human capital (HC) confirm Hypothesis 1. Regarding the structural capital (SC), the results support a statistically significant relationship between it and customer satisfaction, confirming Hypothesis 2. Similarly, a statistically significant relationship was found between relational capital (RC) and customer satisfaction, confirming Hypothesis 3.

5 Conclusion

Throughout this work we intended to carry out an analysis of the relationship between IC and customer satisfaction in hotels in Porto, Northern Portugal, and Galicia. Specifically, we aim to find the determinants of IC in customer satisfaction, providing hotel facilities with ways to improve and enhance their results.

Our conclusions go in line with Taegoo et al. (2011) indication that factors such as work environment, relationships, rules and procedures, and organizational support in knowledge creation predict customer satisfaction. Regarding the HC, the results suggest that “awards and rewards” and “training and knowledge creation” are factors that can improve customer satisfaction.

A relationship between RC and customer satisfaction was also found, indicating that relationships with “collaboration networks” and the “relationship with stakeholders” are important in determining customer satisfaction. Therefore, positive relationships with external stakeholders such as customers, suppliers, and other institutions and the exchange of knowledge between them create value for organizations and, consequently, improve the relationship and satisfaction with their customers. These results agree with the study by Guchait et al. (2011) who concluded that in services, knowledge management significantly influences customer satisfaction.

Taegoo et al. (2011) consider that RC should be evaluated on the basis of responding to customer complaints, sharing customer feedback between departments, offering a value-added service to customers, and solving their problem.

Regarding the methodology used, factor analysis was used, in line with the conclusion of Mohammed and Vahid (2012) that regression is the most used analytical technique in hospitality studies.

As a future line of research, we suggest studying the link between IC and customer satisfaction using customer satisfaction index (such as ACSI) (Deng et al., 2013) and the consequences in terms of market share and sales rate, as well as the relationship with hotel pricing policies, considering customer ratings, as Ogut et al. (2012) suggested. We also propose that a PLS-SEM technic is used to do an in-depth analysis of this phenomenon. Future research on this topic is suggested to be a longitudinal sample of data to determine the relationship between variables over time.

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The Co-evaluation of a Circular Economy Self-Assessment Tool for Hotels



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Abstract Participating in the circular economy can be a challenge for small and medium hospitality organizations. To examine this problem, within the InnoEcoTur research project, we have created an evaluation tool together with different stakeholders that has followed a participatory process from development to evaluation, as explained in this paper. The co-evaluation of the tool allowed us to refine and adapt it to the real environment of hospitality organizations, improving its usability and potential user experience. The methodology that we have applied for co-evaluation is an unmoderated, remote, and exploratory usability test, developed from the literature and primary information obtained in the research project. This test has been completed by some experts in the sector. The results show that it is a useful tool, but it must be accompanied by some training, network support, information about suppliers, and consultancy when some specific data need to be retrieved or calculated. The results are relevant to hospitality organizations and their suppliers, as well as for circular economy policymakers.

Keywords Circular economy · Hospitality · Tourism · Self-assessment tool

JEL Classifications L83 · F6 · Q56

1 Introduction

Every year, billions of people participate in tourism. The United Nations World Tourism Organization (UNWTO) predicted that this number will increase by an average of 3.3% annually until 2030, when it will reach 1800 million. The Spanish tourism industry presently ranks third in terms of visitor arrivals and second in terms of revenue, according to the most recent data (UNWTO), which has a positive impact

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on the gross domestic product (GDP) and economic development of the nation. In fact, 82 million tourists visited Spain in 2017, bringing in more than 87,000 million euros and increasing the sector's contribution to the national economy by up to 12.1% of GDP (Instituto Nacional de Estadística, 2022). According to data from the Ministry of Employment and Social Security, this industry employed 2,297,331 people in Spain in 2017, including 77,501 new jobs. These numbers are also consistent and even more important in some Spanish regions that are highly dependent on tourism, like the Valencian Community. According to the IMPACTUR Comunitat Valenciana study, published in 2017, the tourism industry is regarded as the region's economic engine, with its weight having grown steadily since 2011, reaching 15.1% of all employment and 14.6% of the regional GDP. The tourism industry is a crucial one for the Valencian Community in this regard.

The economic significance of tourism contrasts with its negative effects on the environment, which have been escalating in parallel. Tourism has changed the physical landscape of tourist destinations and has also had a significant negative impact on the environment. For example, ecosystems have been destroyed, water quality and quantity have decreased, soils have been depleted and polluted, waste has been produced, and there have been effects on land and at sea. It is estimated that a million visitors to Spain generate 25 million kilograms of carbon dioxide, 1.5 million kilos of garbage, and 300 million liters of wastewater, according to previous research (Gómez-Martín, 2017). Additionally, 300 million liters of water, 2 million kilograms of food, and 11 million liters of fuel are also consumed. The effects caused by pollution, the use of energy resources, or the production of waste and the consequences of these impacts are even more severe in some places, such as the Valencian Community, because of the scarcity of water resources, the loss of biodiversity, and erosion. It is clear that, in this situation, a growth strategy based on sustainable development is required. Beyond enhancing the productivity and sustainability of the tourism sector, the application of concepts and methodologies in favor of the circular economy (CE) can help raise public awareness regarding the responsible usage of resources. In Spain in particular, the Spanish Tourism Council decided to conduct a broad strategic review of the industry to evaluate the challenges and trends that lie ahead because of the significance of these economic, social, and environmental factors. This review resulted in the Horizon 2020 Spanish Tourism Plan (Secretary of State for Tourism), which outlines the sector's goals and strategies for the coming decade with a specific focus on sustainability.

In this context, the CE creates significant commercial prospects for businesses' present and future competitiveness, while addressing many of society's sustainable concerns. Along this line, the InnoEcoTur (<https://innoecotur.webs.upv.es/>) initiative seeks to advance CE-based models and strategies within Valencian society. The goal of the InnoEcoTur project is to develop a "Circular Economy Strategy in the Tourism Sector of the Valencian Community". This implies establishing a network of hotels and restaurants working toward circular solutions for the industry. This study also aims to transfer the findings to industry-related businesses by conducting a requirement analysis of the industry and identifying areas where sustainability could be improved with the help of the various stakeholders involved or by disseminating

the research and development and innovation (R&D&I) outcomes, eco-innovative technologies, and processes to be used in the industry. However, the lack of circular expertise, best practice solutions, or providers that can assist hoteliers to create more circular hotels is hindering the transition to more circular models. Tourism industry companies face difficulties in determining how circular something is or how one solution can be more circular than another (Segarra-Oña et al., 2023). As a result, we need to set a path to move gradually toward a more circular process by establishing common indicators that allow for monitoring a hotel's performance and its comparison with that of a similar hotel. The intricacy of the CE and the limited resources of many small hotels suggest that indicators should be simple to comprehend and calculate, so they do not deter hoteliers from embarking on the journey toward circularity. With this goal, InnoEcoTur has created a basic self-assessment tool for measuring the degree of circularity in hotels (Peiró-Signes et al., 2023). As hotels move toward circularity, this tool is intended to be expanded with two more levels. This will be accomplished by increasing the number of indicators and the detail with which best practices are evaluated. In addition, the focus will be gradually shifted from the actions taken to the results achieved. This tool builds upon the pioneering regulation on the sustainability and circularity of tourism developed by the regional government of the Balearic Islands. The tool is divided into five dimensions, including circularity management, energy, water, waste, and food waste, and also suggests a set of good practices to guide the hotel's action plan.

In addition, the indicators included in the tool can also help public administrations to assess their policies and take actions aimed at promoting circularity in the sector. Among these actions are, for example, the development of environmental labels that encourage and recognize the integration of eco-innovative technologies and processes. Another objective of the InnoEcoTur project is, based on the information provided by self-assessment results, to leverage the tool itself as a basis for defining and granting a distinctive label to those companies in the tourism sector committed to the CE model.

The goal of this chapter is to report the initial evaluation of the self-assessment tool. The evaluation was carried out with a usability test undertaken by five experts in the industry covering the three provinces of the Valencian Community. The results show that the experience of the evaluators varies according to the dimension analyzed, but they offer ideas for improvement in each of them that are easy to incorporate.

The structure of this chapter is as follows. Section 2 is focused on the theoretical framework. The methodology of this study is presented in Sect. 3, along with a description of the evaluation questionnaire and the system usability scale. The results gleaned from the analysis of the experts' responses are examined in Sect. 4. Finally, the findings and practical applications are outlined in the conclusions section.

2 Literature Review

The United Nations General Assembly proclaimed 2017 to be the International Year of Sustainable Tourism for Development. In order to attain sustainability, it is necessary to maximize and protect natural resources, respect sociocultural authenticity, and reduce poverty by offering permanent employment possibilities. When addressing the requirements of the agents that make up sustainable tourism, according to the UNWTO, all these impacts are taken into consideration. Due to the status of the environment and the effects of climate change, it is imperative that clean and environmentally friendly innovations are widely adopted, in addition to a number of priorities and measures that will enhance the demand for these technologies.

The current economic and corporate structures and institutions, however, are out of step with what society requires, just as in previous technological and social transformations (Spiegel-Rosing and De la Solla Price, 1977). Innovation and sustainability are essential for the advancement of humanity. Although the phenomena of eco-innovation have been examined from an economic and strategic perspective in regard to businesses (Bitencourt et al., 2020), their integration at a horizontal level in a setting of inter- and intra-industrial collaboration is scarce.

As a systemic change, the shift to a CE depends heavily on technological and non-technological research and innovation. If we are to redefine the dominant production and consumption model, implement new processes that allow waste to be converted into new inputs and products that become a part of the new value chain, or recover raw materials to be reintroduced in the productive processes, it is necessary to strengthen the foundation of our scientific and technical knowledge. Therefore, encouraging R&D&I in these fields is essential to this transition process. Additionally, this will contribute to EU companies' modernization, development, growth, and competitiveness. In fact, the Spanish Circular Economy Strategy emphasizes the significance of raising people's and stakeholders' knowledge of the issue, encouraging their participation, and promoting R&D&I in support of industry competitiveness, job creation, and the necessary training.

There are more than a hundred definitions of the CE, but there is a common thread among them, according to the Organization for Economic Cooperation and Development (2020), which involves design without generating waste and pollution. That is, the CE is an economy in which "the value of products, materials, and resources is in the economy for as long as possible, and where the generation of waste is minimized" (European Commission, 2018). In addition, the CE allows businesses to increase their financial performance while having a positive impact on the environment and society, as opposed to the linear manufacturing pattern based on the extract-make-use-dispose model (European Commission, 2020). According to current scenarios and forecasts, the CE could benefit the European Union as a whole by 1.8 billion euros by 2030, which is 0.9 billion euros more than the existing linear economy model (Ministry for the Ecological Transition and the Demographic Challenge (MITECO), 2020). Some strategies for advancing the CE have been proposed, such as the following

three guiding principles: circulate products and materials, reduce waste and pollution, and regenerate nature, and the seven “Rs” (Ellen MacArthur Foundation, 2013, 2021). It should also be highlighted that the ideas of eco-innovation and the CE are interconnected. Indeed, they share the promotion of a future with a balance of the social, economic, and environmental components. Both the CE and eco-innovation can favor more dramatic changes than traditional innovations, with stronger effects on the effectiveness of processes and on the outcomes in terms of the economy and society. In fact, the CE requires the development of networks, the generation of social capital, business collaboration, and the development of public–private partnership models.

The CE is aligned with the 2030 and 2050 Agendas and the Sustainable Development Goals. This provides insight into the significance of the CE in a journey to achieve climate neutrality in a situation where waste production and greenhouse gas emissions are rising (Pacto Mundial de Naciones Unidas España, 2021). In particular, the EU allotted 650 million euros through programs like Horizon 2020 with a specific focus on the CE to show its potential from an economic, environmental, and social standpoint. More recently, in order to achieve climate neutrality by the year 2050, the European Commission created the New Action Plan for the Circular Economy in 2020 (European Commission, 2020). In this plan, the commission places special emphasis on the industries it believes consume the most resources in order to maximize the impact of any circularity-related actions. Tourism-related industries, such as food or construction, are included in the list. Moreover, the CE is also included among the prioritized areas in the European initiatives L’Instrument Financier pour l’Environnement (LIFE) and Competitiveness of Enterprises and Small and Medium-sized Enterprises (COSME), or as research and innovation strategies for intelligent specialization (RIS3). In Spain in particular, due to its significance to the Spanish economy, the tourist sector is one of the sectors used as a reference in the Circular Economy Strategy in Spain (MITECO, 2020). All these plans and actions show the importance of policies and governmental commitment that are necessary to face such a complex shift in the way companies have been operating.

2.1 The Circular Economy in Hotels

According to Ghisellini et al. (2016), the CE is a concept that extends beyond reduction, reuse, and recycling by extending the scope of the intervention from the conception of the good or service through redesigning to the extension of the resource’s life through recovery or the product’s life through remanufacturing. The hospitality industry’s efforts to promote the CE have been mostly noted in the recycling of waste and reducing water, as well as electricity consumption. However, some regions are going further in their efforts to promote sustainability in the industry by promoting new regulations, such as in the Balearic Islands (Comunidad Autónoma de las Illes Balears, 2022). The hotel industry and the nearby industrial environment must work

together and develop symbiotic relationships in order to implement such strategies (Singh & Giacosa, 2019).

Since the hospitality industry is an operational service sector, the majority of CE implementations have been focused on enhancing the circularity of hotel operations. According to Manniche et al. (2017), reduction techniques are actually the most popular ways to promote sustainable and circular practices in hotels. Eco-innovations are also common practices in this field (Alonso-Almeida et al., 2016; Florido et al., 2019). Best practices are mainly related to decreasing the use of energy and water, such as through renewable energies or efficient lighting (Vourdoubas, 2016; Girard & Nocca, 2017), the lowering of water consumption with water aerators, environmentally friendly laundry services, rainwater or graywater storage (Alonso Almeida et al., 2017, Fernandez-Robin et al., 2019, Manniche et al., 2017), or the reduction of waste through recovery and reuse techniques.

Only a few projects have been created, as far as we are aware, that examine circularity at a business level (Valls-Val et al., 2022). Many of these are product-oriented or focused on the design rather than on assessment, which is unsuited to the features of a service like accommodation. Additionally, several of these tools assess circularity using perception scales (qualitative), whose values depend on the respondent's perception and not on measurable results or facts (quantitative). Therefore, an objective and focused tool was required to assess circularity in hotels. Moreover, a framework for the consistent measurement of hotel circularity and for benchmarking hotels in order to better manage hotel sustainability and stakeholder interests was necessary. The InnoEcoTur project therefore developed a self-evaluation tool for assessing the implementation of the CE in hotels (Peiró-Signes et al., 2023).

2.2 The Circular Economy Self-Assessment Tool

The CE tool aims to support hotels in their transition to the CE. It is designed as a self-assessment questionnaire and complemented by a best practices file and an application guide. The tool allows properties to make an initial assessment of their current level of circularity. Based on this evaluation, hotels will be able to decide on which indicators to improve and make estimates of what values they need in those indicators to achieve specific results on the overall circularity score.

The EC questionnaire is split into seven parts. It starts by asking for hotel-relevant information to cope with the indicators' data requirements, before including questions relating to the five dimensions used to evaluate the circularity, and finishes with the scores and the evaluation of the dimensions and the overall performance of the hotel.

- **Part 1. Information:** In this area the hotel will include information about the accommodation, such as location data, type of accommodation (i.e., number of rooms or number of stars), and variables that reflect its size (i.e., number of occupied rooms or number of nights that guests stay).

- Part 2. Circularity plan: In this dimension, the hotel will include information related to its CE strategy.
- Part 3. Energy: In this dimension, the hotel will add data on its energy consumption, carbon footprint, and certifications.
- Part 4. Water: In this area, the hotel will record the data related to the management and consumption of water.
- Part 5. Waste: In this dimension, the hotel will include the types of waste it generates, the actions it will carry out, and its management of the different types of waste.
- Part 6. Food waste: In this dimension, the hotel will indicate the origins of the food it purchases and the actions it will carry out to reduce waste.
- Part 7. Evaluation: In this part, the hotel will obtain the evaluation of its circularity based on the data provided in the previous sections. Each will receive a score in each dimension and a final overall score.

However, developing the first version of the tool is just one of the many steps in the process of setting a measurement tool as a standard in the industry. The aim of the InnoEcoTur project members at this stage is to validate this tool with industry stakeholders and start to collect data on hotels to evaluate the situation of the CE in the Valencian Community. The first step in this stage is to improve the usability and experience of the tool. In this chapter, we present the results of the evaluation of the tool by five experts in the industry using the Spanish version of the system usability scale (SUS) developed by Brooke (1996).

3 Methodology

To evaluate the tool, we used an unmoderated, remote, and exploratory usability test. The objective of the evaluation is to obtain ideas to improve the usability and experience of the tool.

3.1 Data

To evaluate the usability of the EC tool, we retrieved the information through a questionnaire using Google Forms. The questionnaire included closed and open questions and was organized into two different sections, with one focused on evaluating each of the parts of the tool and the other on the summary of the tool's usability.

The first section included closed and open questions and was divided into eight tasks. The closed questions evaluated the user experience, the open ones elicited information regarding the difficulty in obtaining the data, the need for external help to answer the questions, and any other additional comments to improve the indicators

Table 1 Questionnaire structure summary

Task	Closed questions	Open questions
1	Experience in downloading the tool	How to improve the experience of downloading the tool
2, 3, 4, 5, 6, 7	Experience about the information indicators included in sheet <i>x</i> (<i>x</i> : hotel information and the five dimensions of the tool: circularity planning, energy, water, waste, and food waste)	Difficulties working with the indicators, the need for external help for the data, and additional comments for improving the experience
8		Indicate the weight that should be given to each of the dimensions (plan, energy, water, waste, and food waste)

of the tool. This section seeks to reduce the possible limitations that can be generated by the use of the scale in the second section.

In the second section, we included only one task. We employed the Spanish version of the SUS developed by Brooke (1996), which is considered a benchmark in usability analysis. The SUS is an instrument widely used for measuring perceived usability (Lewis, 2018), as it is fast and has been proven to be valid for evaluations with up to five participants. Additionally, it can be utilized for any type of software or hardware (Barnum, 2020). Although there are other methodologies for evaluating usability, the SUS is the better fit to the type of tool we are trying to evaluate.

The final version of the evaluation questionnaire is shown in Annex 1. The tasks refer to each of the sheets included in the Excel file, where the CE tool has been implemented. Table 1 summarizes the different tasks and objectives of the questions included in the first part of the questionnaire.

Task 9 focused on Brooke's SUS (1996) to analyze the usability perceived by the evaluators. Participants were asked in this area of the questionnaire to score the ten items (see Table 2) with one of five responses ranging from strongly agree (5) to strongly disagree (1).

Finally, at the end of the questionnaire, we included an open question in case the evaluators wanted to indicate any additional ideas that would allow for improving the tool as a whole.

We selected five experts with proven experience in measuring the CE in the hotel sector of the three provinces of the Valencian Community, and the questionnaire was completed during the first week of July 2023.

3.2 Analysis

The analysis that we carried out with the data obtained is qualitative and descriptive, since we only had five expert evaluations.

Table 2 Usability summary questions

1	I think that I would like to use this system frequently
2	I found the system unnecessarily complex
3	I thought the system was easy to use
4	I think that I would need the support of a technical person to be able to use this system
5	I found the various functions in this system were well integrated
6	I thought there was too much inconsistency in this system
7	I would imagine that most people would learn to use this system very quickly
8	I found the system very cumbersome to use
9	I felt very confident using the system
10	I needed to learn a lot of things before I could get going with this system

The SUS scale was converted to scores. Items 1, 3, 5, 7, and 9 were calculated as the scale value minus 1. Items 2, 4, 6, 8, and 10 were measured as 5 minus the scale value. All the scores ranged from 0 to 4. The participants’ scores for each question were then added and multiplied by 2.5 to convert the original scores to a 0–100 scale.

4 Results

In this section, we include the summary of results and the most important ideas that have been extracted from the analysis (Table 3).

The experience of the evaluators illustrated in Fig. 1 has been grouped together in Fig. 2. Looking at the figure, it can be inferred that the experience is lower for some evaluators in areas 5 and 6, that is, those related to the waste and food waste indicators.

In Task 9, the evaluators were asked to summarize their experience through the system usability scale (SUS) by Brooke (1996). Table 4 shows the evaluation carried out by each evaluator and the summary of the SUS for all the evaluators. Following Brooke’s instructions, the scores for each item and the total for each evaluator were calculated (Fig. 3).

The final comments regarding the EC tool offered additional insights. Examples of these include:

- “Congratulations on the work done!”
- “In general, I find it a very interesting tool. However, I think it will be necessary to manage the expectations of the person who has to use it with respect to the time it will take to complete the evaluation”.
- “After the semicolon, the capital letter is not used; there are a lot of parentheses within parentheses and this should be avoided (replaced by hyphens or brackets), but it is easier to avoid starting with parentheses when explaining after the statements, as after all, the font is different”.

Table 3 Summary results

Task	Area comments analysis
1 Downloading the tool	Macros (acceptance) might be an issue
2 Hotel information	<p>Difficulty in measuring the indicators:</p> <ol style="list-style-type: none"> 1. Include location 2. Clarify identification variable (ID) <p>External help: not necessary</p> <p>Additional comments or improvement ideas:</p> <ol style="list-style-type: none"> 1. Add the hotel location 2. Explain “chain management” term
3 Circularity planning	<p>Difficulty in measuring the indicators:</p> <ol style="list-style-type: none"> 3. There is no difficulty (three evaluators) 4. The difficulty would be related to retrieving information from other managers in the company to be able to answer some questions <p>External help: not necessary for most of them</p> <p>Additional comments or improvement ideas:</p> <ol style="list-style-type: none"> 5. Length of the questionnaire 6. Comments in some cases are not displayed in their entirety 7. Some cells are not limited (i.e., percentages should not be allowed to exceed 100)
4 Energy	<p>Difficulty in measuring the indicators:</p> <ol style="list-style-type: none"> 8. Include information about the range of values for the electrical and lighting installations 9. Carbon footprint calculation will require external consulting <p>External help: for the calculation of the carbon footprint</p> <p>Additional comments or improvement ideas:</p> <ol style="list-style-type: none"> 10. Typo issues 11. Some of the sections are too technical or require retrieving information and cannot be completed directly
5 Water	<p>Difficulty in measuring the indicators:</p> <ol style="list-style-type: none"> 12. It is difficult to evaluate the capacity for the self-supply of water (two evaluators) 13. Typo issues <p>External help:</p> <ol style="list-style-type: none"> 14. This will be necessary for the self-supplying capacity of water 15. No outside help will be needed, but some inside work will be <p>additional comments or improvement ideas:</p> <ol style="list-style-type: none"> 16. Requires retrieving information and cannot be completed directly 17. Concerns about how best practices are presented in the questionnaire

(continued)

Table 3 (continued)

Task	Area comments analysis
6 Waste	Difficulty in measuring the indicators: 18. Some are difficult to measure or estimate, especially for small businesses External help: 19. Necessary for some indicators Additional comments or improvement ideas: 20. Include waste types (European Waste List codes for classifying waste) 21. Suggest asking the waste manager for the information as they will be able to tell them exact amounts in kg of each type of waste (this is requested by law) 22. Typo issues
7 Food waste	Difficulty in measuring the indicators: 23. It is difficult to determine the amount or percentage spent on sustainable purchases External help: 24. Not necessary Additional comments or improvement ideas: 25. Add whether the facility suggests/facilitates strategies such as doggy bags 26. Formatting and typo issues

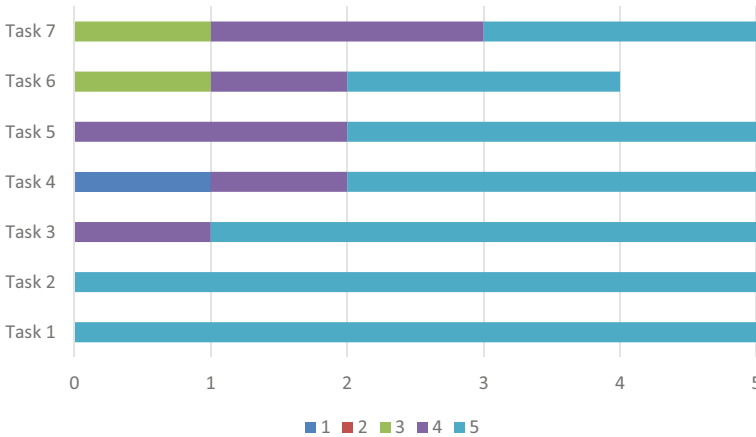


Fig. 1 Results summary. *Source* own elaboration

Once the comments and evaluations were analyzed, the following improvements were incorporated into the CE tool (some comments were dismissed as they were not aligned with the purpose of the tool or because they will be addressed in more advanced levels of the tool):

- Sheet 1 (Information): The location of the hotel has been included in addition to the province, because some chains might own various hotels in the same province.

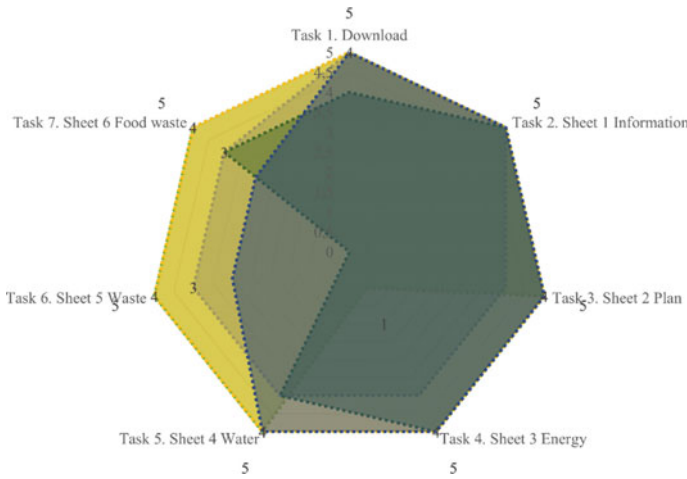


Fig. 2 Experience results for the tool. *Source* own elaboration

In addition, the ID element has been explained, indicating to hotels and chains that they should give a code to every hotel establishment.

- Sheet 2 (Plan): The plan has been revised to ensure that comments can be seen completely in cells.
- Sheet 3 (Energy): Additional information has been included to show hotels where they could find the data for indicators related to energy and how they might measure their carbon footprint. In the strategy for carbon footprint compensation part, Sects. 1.1 and 1.2 have been incorporated, with yes/no options for 1.1 and values for 1.2.
- Sheet 4 (Water): Additional information has been added to show hotels where they could find the data for indicators related to water. Sections 4.1 and 4.2 have been included, and more information for 4.2 has been incorporated.
- Sheet 5 (Waste): Additional information has been included to show hotels where they could find the data for indicators related to waste. LER codes for waste have also been incorporated. Spelling errors have been revised (i.e., water instead of waste and numbers).
- Sheet 6 (Food waste): Numbers have been revised. In addition, additional information has been included to show hotels where they could find the data for indicators related to food waste.

The final questionnaire will be submitted to a number of hotels for the next step in the validation process. This next step will aim at adjusting the scales for each of the quantitative indicators on which scores are assigned. Although the scales have been calculated based on information from a sample of more than 1000 hotels in the Mediterranean area (Greenview, 2021) and data from regional and governmental agencies, we should expect hotels that have been the frontrunners in implementing sustainability measures to obtain a good score in this basic tool and those that have

Table 4 SUS evaluation results

Question	Evaluator scores*				
	1	2	3	4	5
1. I think that I would like to use this system frequently	2	1	4	2	2
2. I found the system unnecessarily complex	4	2	4	3	3
3. I thought the system was easy to use	2	3	4	3	3
4. I think that I would need the support of a technical person to be able to use this system	2	2	4	1	3
5. I found the various functions in this system were well integrated	3	3	4	3	3
6. I thought there was too much inconsistency in this system	4	4	4	3	4
7. I would imagine that most people would learn to use this system very quickly	2	2	4	3	4
8. I found the system very cumbersome to use	3	1	4	2	2
9. I felt very confident using the system	4	2	4	2	2
10. I needed to learn a lot of things before I could get going with this system	1	0	4	1	3
Total	27	20	40	23	29
ITS Total = SUM * 2.5	67.5	50	100	57.5	72.5

* For odd questions, the score = scale value—1. For even questions, score = 5—scale value

not been so active to attain worse scores and lower evaluations. Hotels with a very good evaluation on the basic assessment will be able to move forward to the next step with a more detailed set of indicators and good practices, and those lacking a sustainable and circular approach will find an instrument in the tool for monitoring their performance and guiding an action plan.

Furthermore, it is important to highlight that the self-assessment tool could potentially serve as a foundation for defining and awarding a distinctive label to companies within the tourism sector that are committed to the CE model. In this regard, it would be reasonable to include a series of training initiatives within the context of a comprehensive strategy, which includes label creation as one of its proposals. These educational efforts, facilitated by the regional government, could be conducted by the team responsible for developing the tool and should focus not only on instructing participants on how to use the tool effectively, but also on interpreting the results

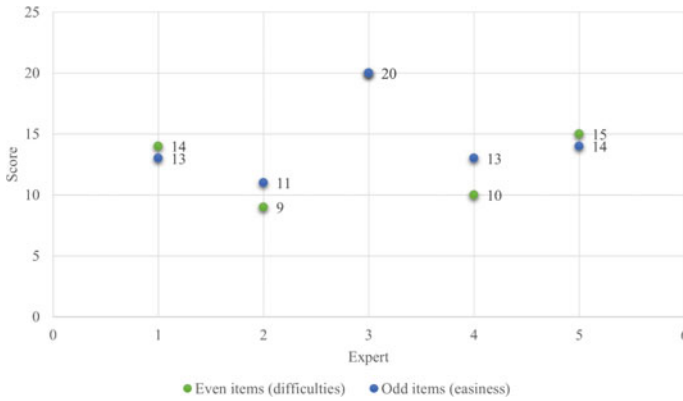


Fig. 3 Sum of odd and even items in SUS. *Source* own elaboration

accurately and explaining the relevant best practices that can enhance the outcomes in each specific case.

The Valencian regional government possesses some degree of experience in analogous contexts, as exemplified by the Registro de Entidades Valencianas Socialmente Responsables, which functions as a form of recognition similar to a label on the basis of a self-assessment tool. In this case, for instance, several manuals and guidelines (<https://cindi.gva.es/es/web/economia/registre-entitats-valencianes-socialment-responsables>) have been produced, and training initiatives (<https://www.ibiae.com/content/jornada-registro-de-entidades-valencianas-socialmente-responsables/>) have been promoted to support this endeavor.

5 Conclusions

This chapter has presented the evaluation of the CE self-assessment tool, including the design as well as the results provided by the five selected evaluators. The objective was to obtain ideas for improvement in the usability and experience of the companies for which the CE tool has been designed, which are hotels. To do so, five experts were recruited to conduct the evaluation, which included a questionnaire with closed and open questions and the usability test designed by Brooke (1996).

The tool is a useful instrument for companies in the industry, but there are aspects in which it can be improved, especially in terms of the indicators for waste and food waste. The evaluation has highlighted that there will be a need for training hotels in measuring their implementation of the CE. In some cases, hotels might require individual support, which could be offered by the network of companies specialized in the CE.

The time required to use the CE tool should be taken into account. This could be linked to training in assessing the CE of hotels, which would reduce the time needed to measure circularity.

For some indicators, external help will be needed, as the data may not be internal to the company, or they might not have the knowledge, experience, or capabilities to calculate it. This is an important issue that might require that hotels consider their selection of suppliers. When suppliers are able to measure their own circularity, hotels may find it easier to obtain the data they need to assess the indicators in the CE tool. Sometimes, helping hotels to find data in the invoices they receive from suppliers would be enough to complete the cells in the CE tool.

Further research will be aimed at evaluating and adjusting the scales and scores that have been initially set in the tool.

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Activation of Motivational Factors from the Implementation of Total Quality Management in Hotel Businesses



Aristeidis V. Katsaitis, Fragkiskos G. Bersimis, and Paris Tsartas

Abstract The purpose of this research was to investigate the activation of human resource motivation factors with the satisfaction of high-value needs and the satisfaction of their expectations, in a sample of hotel businesses in the categories 4* and 5* of the Prefecture of Attica. A survey was conducted using an electronic questionnaire that included appropriate questions addressed to the Human Resources Managers of the 4* and 5* hotel units. The results indicate that hotel companies consider the effort of human resources important in a special human-centered environment, such as hotel companies, whose managements try to satisfy the important needs of their human resources in order to deliver higher performance through motivational factors. The satisfaction of the needs of the human resources is to a sufficient or very satisfactory degree of coverage in the human resources, whether these needs concern the working environment, or concern the mental-emotional environment of the employee. Also, the human resources of hotel businesses have expectations, which the management knows and satisfies at a fairly high level, but the management's expectations for satisfactory results from the employees are also at a high level. Human resources are considered the main shapers of hotel products and services, since their work affects the quality of what they produce to satisfy the needs of the hotel customer.

Keywords Hotels · Total quality management · Needs · Incentives · Human resources

JEL Classifications Z300 tourism economics: general

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1 Introduction

What is investigated in the present research is related to the activation of human resource motivation factors from the implementation of total quality management in hotels of categories 4* and 5* of the Prefecture of Attica. The main question is whether motivational factors are activated by the satisfaction of their high-value needs and, by extension, whether their professional and personal expectations from their work are satisfied. These factors are formed based on the application and degree of effectiveness of total quality management. The statistical significance will be investigated in individual questions for the recognition of the employees' efforts, the effect of the material working conditions, the development of interpersonal relationships, the security of their work, participation and responsibility, the prospects for development—promotions, the development of the knowledge, skills and personality of the employees, their financial remuneration and moral reward, the satisfaction of achieving an important goal, the enrichment of their work, the satisfaction with the object of their work and the policies of the management of the hotel business.

2 Literature Review

The human resources of the hotel business are considered one of the most important factors in the production and distribution of hotel products and services. The degree of importance of human resources results from their direct involvement with direct contact in the production of hotel products and services. This mixture is integrated into the concept of “hospitality” for the visitor—hotel customer. Also, the other element that strengthens the degree of importance concerns the inhomogeneity of the hotel product, from the differentiation of the two main categories of the hotel product, such as the room sector and the catering sector and also, the inhomogeneity of human resources, due to different education and of cultural differentiation, in the formation of a differentiated culture of different human needs.

Also, the continuous and consistent dedication of the human resources contributes to the more effective implementation of the total quality management, whose produced quality characteristics are integrated into the human resources as quality elements.

Human resource management (HRM) tries to activate the human factor in the workplace to achieve strategic goals and at the same time satisfy their personal needs. The international literature reports on human resources management, as described by Stavrinoudis and Livadioti (2011), pp. 4–5, should manage labor relations within the company, human resources management and organizational behavior, in a way that ensures consistency and the harmonious functioning of human resources internally in relation to external factors, giving a competitive advantage since human resources will affect quality characteristics of the product and as an operational part of the

company, any change from the wider environment as the behavior of the company will pass through it toward its human potential.

Human resources management is an important factor for the management of the orderly operation within a company, investing in human resources creates an increase in its sustainability against the competition (Langbert, 2000, pp. 85–101). In the hotel business, it is very important to develop balanced partnerships for labor relations, between employees and employers as well as human relations between employees, regardless of the administrative level to which each employee's position belongs. This will increase the human satisfaction of the employee and through his behavior will pass to the customer, through his offer and his service (Huemann et al., 2007, pp. 315–323).

Total Quality Management has a basic orientation to the human resources that shape the degree of quality of the hotel products and services, which the customer consumes through their creation and production. Long-term benefits are achieved through the total effort of human resources. However, the success of this whole effort is, according to Stavrinoudis and Frangoulakis (2010), the participation of the entire hotel business, with the responsibility of the senior management, which will explain the importance of quality and motivate the human resources to make strategic decisions.

Total Quality Management develops through a network of relationships between human resources, from the highest to the lowest administrative level, which is dominated by participation, close cooperation with democratic values, and the result of which confers benefit on all human resources. The result will be open communication and unimpeded flow of information, delegation of authority and responsibility to the lower level of management, participative decision-making, continuous training to expand and enrich knowledge, which will lead to improvement and utilization of human resources (Kefis, 2005, p. 48) and high-value needs will be met in human resources.

Thus, a framework of human relations with inherent values will be developed on the basis of Total Quality Management. Values will act as motivations by satisfying the needs of those people primarily who produce and provide the hotel product and will give human substance to the intangible service of service and produce human "hospitality."

The purely human-centered character of total quality management (IPM, 1993; Preffer, 1994), contributes to the development of employees' capabilities, forming the conditions for the development of their cognitive and technical skills. According to Preffer (1994), as mentioned by Vouzas (2002, p. 287), "this new quality improvement movement recognized and promoted to a great extent the fundamental role and importance of human resources".

The behavior of human resources toward the hotel customer is dynamically inter-related with identification of the production and consumption of the hotel service. Thus, the behavior of one affects the other and vice versa at the same time. The emotional and psychological state of the employee is of decisive importance because it affects his behavior and this is transmitted to the customer, determining the quality of the service he provides (Schneider & Bowen, 1985).

In hotels, the human element is what produces and provides hotel goods, such as accommodation services, food products and services (events, exhibitions, conferences services). The management of human resources by applying the principles of total quality management will contribute to the development of labor relations, between employee and employer, to more effective cooperation in work groups and to the motivation for training to acquire scientific and technical knowledge that will give him personal development and satisfaction of their needs (Stravrinoudis and Livadioti, 2011, p. 5).

In the hotel industry, the services offered require technical training, ability, appropriate behavior, degree of responsiveness and interest to the customer, etc. This is achieved with satisfied human resources. When the employee feels appreciation for his person and the support in his work, this motivates him to give his best in the quality of the service he provides (Chytiris and Anninos, 2015, p. 138).

If the hotel management manages to recognize and satisfy the human needs and motivations of human resources, this will contribute to the improvement of customer satisfaction in the future (Maroudas et al., 2008, p. 259).

Stavrinoudis and Livadioti (2011), p. 19 report research which has shown that “it becomes clear to hotel executives that employees are recognized as an extremely important factor for the sustainability of the company, while no corporate goal can be achieved if the vision of the company has not been communicated to the employees company”.

Human resources are not motivated and do not perform with fear, threat, tension and insecurity, on the contrary, creative thinking decreases and negatively burdens the mental emotional and spiritual (Boudarene et al., 2002; Tang & Posner, 2009).

In the hotel business, the employee’s service to the customer is direct contact. This condition increases the employee’s stress from the pressures exerted during the performance of the service. The pressures on the employee usually concern organizational issues such as, (a) their performance in the performance of the job, (b) their evaluation system, (c) the work climate, (d) role overload, when the employee is asked to exceed the capabilities of, (e) in the conflict of roles, when different people put forward demands such as, the superior, the third person who is accountable, etc. or even different values and beliefs and (f) in the ambiguity of roles, from undefined responsibility, the different expectations from different people, the determination of priorities and also the standards of evaluating their performance. The effects of these pressures and stress on the employee are reduced morale, fatigue and frustration resulting in low-quality delivery and increased operating costs in the hotel business (Johnston et al., 2012; Goleman & Boyatzis, 2008).

They have been recorded in studies, for Total Quality Management in the hotel industry, for factors related to the human resources of the hotel business, in matters of education, training, communication, empowerment, employee satisfaction, participation in teamwork and in continuous improvement (Breiter & Kline, 1995; Arasli, 2012; Mukhles, 2021, pp. 27–28).

Theories of Motivation

The satisfaction of human needs is what motivates people and creates the motivation for motivation toward a goal or purpose, of course, there are various theories about what motivates the employee.

Maslow (1943), pp. 370–371, Vaxevanidou and Rekleitis (2019), pp. 479–480, Kakarougas (2018), p. 141, in his attempt to interpret what motivates the employee, refers to the prioritization of needs and specifically the living needs, the safety needs, the social needs, the esteem needs and the self-actualization needs. In this hierarchy, it is observed that in the first two categories of needs (physical and safety), lower value needs are satisfied and form the basis for meeting the employee's needs at the highest levels of the Maslow scale (esteem, development, self-actualization), which satisfy the higher value needs, with a deeper mental and emotional value for the person/employee.

Herzberg et al. (1959), Vaxevanidou and Rekleitis (2019), pp. 479–480, Tirimba (2014), pp. 16–20, Koutouzis (1999), pp. 178–181, Avramidou (2011), pp. 87–88 in his theory argued that there are two factors, the “health” or “maintenance” factors and the “motivation” factors, where in each factor there are classified needs of the workers. According to this approach, Herzberg considers that the “maintenance” factors concern a category of needs of lower value and do not motivate employees, while the factors “motivation” concern a category of needs of higher value and motivate the employee.

Also, McClelland (1961, 1987), Vaxevanidou and Rekleitis (2019), pp. 479–480, Koutouzis (1999), pp. 181–183, in his theory for “achievement” needs or “the three needs,” is based on specific human needs, such as the need to achieve an important and difficult goal, the need to form a bond or relationship and the need for power, which will determine the employee behavior to create motivation at work. McClelland believes that man expects to satisfy needs that are at the highest level of his needs. Achieving an important and difficult goal, as well as the need for power, are undoubtedly considered high-value needs for the human/worker, while for the creation of bonds and relationships, he considers a low-value need for the human/worker, since he needs a strong bond, to belong somewhere, to be influenced by the point of view of others, without self-confidence and without initiative, closer to the category, according to Maslow, of meeting the need and security.

Also, Alderfer (1969), pp. 142–175, Vaxevanidou and Rekleitis (2019), p. 480, with his theory essentially follows in the steps of Maslow, without the element of the hierarchy of needs, although all this and in this theory, it is observed that low and high-value needs for the human/worker are covered.

And in McGregor's theory, (Tirimba, 2014, pp. 16–20; Avramidou, 2011, p. 87), it is not oriented toward meeting low or high-value needs, nor is a structured group of motivations presented, except in the theory P, where the management trusts the workers and they motivate themselves.

In the theory of “equality—justice,” Adams (1963), p. 422, Vaxevanidou and Rekleitis (2019), pp. 484–485, Koutouzis (1999), pp. 185–188, Kakarougas (2018), pp. 143–144, Tirimba (2014), Papagiannis (2004), p. 141, considers that the

employee's behavior is determined by the feeling of justice that he possesses. The employee tries through subjective criteria to balance the equality between the "offer" and the "result," in order to ensure primarily the needs of the low value and then those needs of the high value for the person/worker.

In Vroom's theory, Vroom (1964), Tirimba (2014), pp. 16–20, Koutouzis (1999), pp. 175–186, Kakarougas (2018), pp. 145–146, Laloumis (2015), p. 131, Papayiannis (2004), pp. 143–145, which is based on the "expectation" of the employee, the management does not determine which value of the needs will be satisfied first, but subjectively, the employee expects his needs to be satisfied from different value levels, depending on the priority he prefers.

In Deci and Ryan's "self-determination" theory, Deci and Ryan (2000), pp. 227–268, Vaxevanidou and Rekleitis (2019), pp. 488–489, it is observed that it moves close to Herzberg's approach due to the separation of motivations, of low value and those of high value, with the differentiation, however, that the employee maintains the autonomy and self-control of his actions, which offers him internal satisfaction.

In Bandura's "self-efficacy" theory, Bandura (1977, 1988), pp. 275–302, Vaxevanidou and Rekleitis (2019), pp. 488–489, Kakarougas (2018), pp. 150–151, management is based on the belief of the employee, but in this theory, the priority of satisfying low- or high-value needs is determined solely by the achievement of a pre-selected goal each time by the employee.

From the theories of motivation, it follows that almost all of them are mentioned, with some variations in the motivations that satisfy lower or higher value human/employee needs. However, in the present research, Herzberg's theory is chosen, where it will become clear whether the needs represented by the "health" or "maintenance" factors have been ensured, in order to smoothly and comprehensively go toward the satisfaction of the employee's high-value needs. The needs of high value, as classified by Herzberg, are identified to a high degree with the requirements/conditions for the application of the principles of total quality management, which assumes that total quality should run, horizontally and vertically, the entire hotel business, "quality" should be integrated into all human resources and expressed on many levels to satisfy needs, both at the human level (emotional—psychological) and at the level of the working environment and professional development.

3 Methodology

The research was carried out using a mix of quantitative and qualitative methodology in 120 hotels in the wider area of Attica. Regarding the quantitative approach, an online questionnaire (Greek language) was used for the purpose of investigating the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations and the degree/frequency of Meeting Human Resources Expectations. A pilot study was conducted in order to improve the questionnaire in terms of possible errors and failures in interpretation. The sample contains 85 four-star and 35 five-star hotels (Fig. 1). The distribution of hotels in terms of number of rooms and number

of beds is shown in Figs. 2 and 3. Most hotels have < 50 rooms and more than 100 beds. More than a quarter of the respondents stated that they have between 11 and 16 years of experience in this position (Fig. 4) and in addition, more than 66% of the respondents have completed studies in higher education (Fig. 5).

The questionnaire’s variables used in this paper aim to measure the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations and the degree/frequency of Meeting Human Resources Expectations. The corresponding questions were in a Likert seven-point scale, i.e., (1) corresponding to “Not at all,” (2) corresponding to “Minimum,” (3) corresponding to “A little bit,” (4) corresponding to “Moderate,” (5) corresponding to “Enough,” (6) corresponding to “Very much” and (7) corresponding to “Absolutely.” Questions/attitudes exploring the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations and the degree/frequency of Meeting Human Resources Expectations were represented by the following 26 variables:

- D1.1. The material working conditions.
- D1.2. The recognition of efforts.
- D1.3. Interpersonal relationships.
- D1.4. The participation and feeling responsibility.
- D1.5. Security/security for the job.
- D1.6. The policies of the hotel business.
- D1.7. The very object of work, be interesting and important.
- D1.8. The professional prospects development—promotions.
- D1.9. The way of supervision by supervisor.

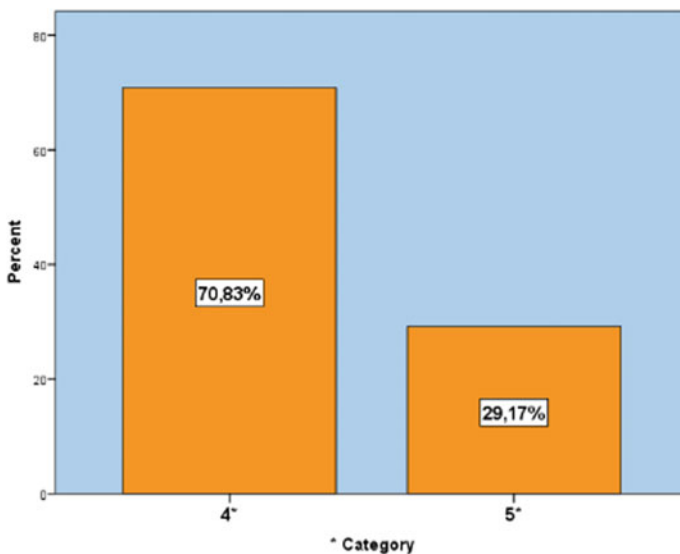


Fig. 1 Hotels’ distribution according to * category

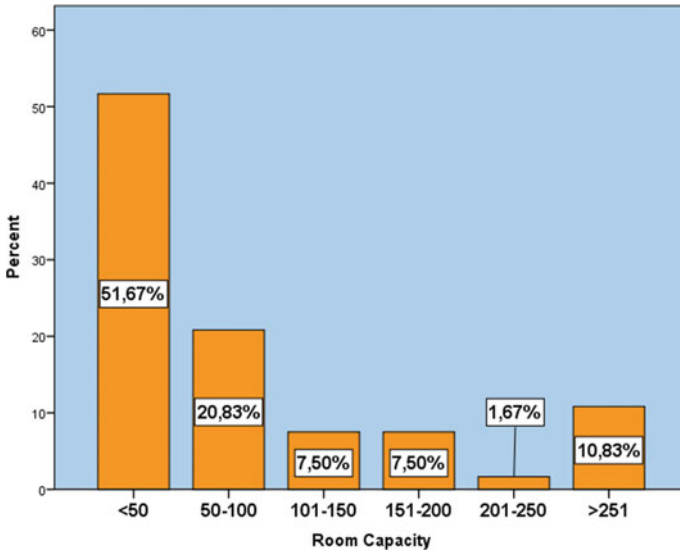


Fig. 2 Hotels' distribution according to rooms' capacity

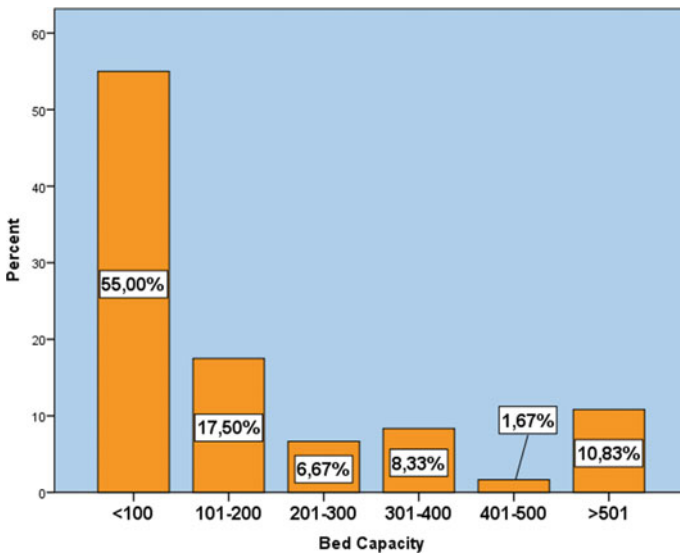


Fig. 3 Hotels' distribution according to beds' capacity

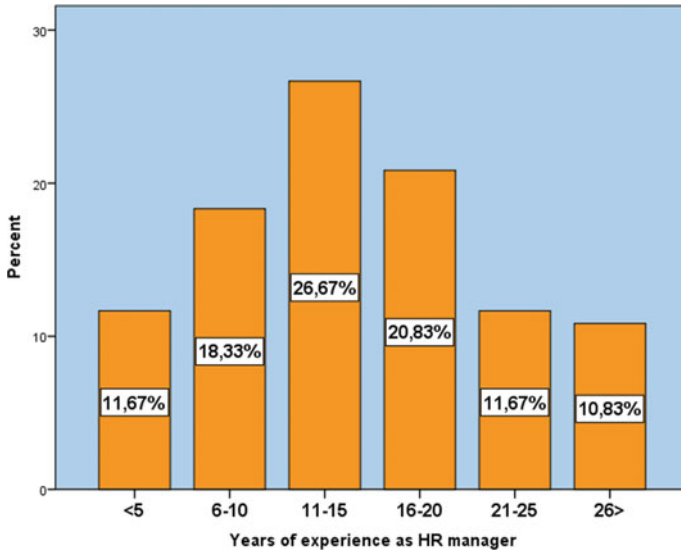


Fig. 4 Distribution of the hotels according to the years of experience of their HR manager

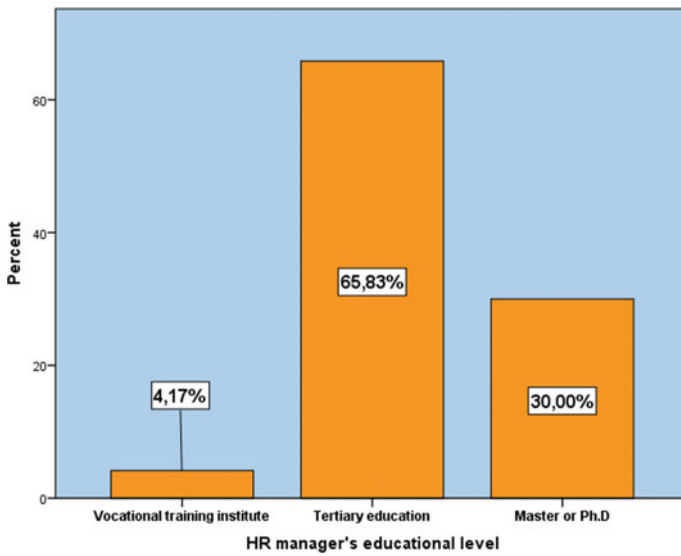


Fig. 5 Distribution of the hotels according to the educational level of their HR manager

- D1.10. The development of knowledge, abilities and personality of the employee.
- D1.11. The remuneration—the salary.
- D1.12. The moral reward.
- D1.13. The feeling of achievement in something important (goal or purpose).
- D1.14. The enrichment of work.
- D1.15. The management of the hotel business.
- D2.1. Do the human resources of the hotel business have expectations from their work?
- D2.2. Does the management of the hotel business know and individually meet the expectations of the human resources?
- D2.3. Does meeting the expectations of the human resources of the hotel business contribute to increasing their efficiency?
- D2.4. Are management expectations met by HR results?
- D2.5. Does the satisfaction of the expectations of the human resources of the hotel business belong to any of the following categories?
- D2.6. Money
- D2.7. Security
- D2.8. Recognition
- D2.9. Competition
- D2.10. Achievement

The reliability coefficient Cronbach's Alpha was calculated equal to 0.927 providing a high internal consistency of tests used (Cronbach, 1951). Collected data were analyzed using the statistical software IBM SPSS ver.25. For each variable, measures of position (mean) and dispersion (standard deviation) were calculated and tests of equality of means were performed at the scale median one (one sample *t*-test with test value of 4 corresponding to the median of the scale, i.e., the neutral response; Bersimis et al., 2022; Derrick et al., 2017).

4 Results

This survey's respondents answered with a high degree of agreement in all the variables that express the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations i.e., from “Enough” to “Very much” meaning that the degree of agreement was greater than the neutral attitude ($p < 0.01$). The mean values per variable expressing the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations are presented in Fig. 6 in ascending order. Specifically, the respondents answered with a frequency greater than moderate in the following variables that express the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations: “The material working conditions (lighting, room temperature, ventilation, comfort, etc.)” (“Moderate to Enough”/ 4.94 ± 1.45 , $t = 7.137$, $p < 0.01$) and “The prospects for professional development—promotions.” (“Moderate to Enough”/ 4.98 ± 1.44 , $t = 7.415$, $p < 0.01$).

Additionally, the respondents answered with a frequency greater than enough in the following variables that express the degree/frequency of application of basic Factors of Satisfaction of Human Needs—Motivations: “The enrichment of work.” (“Enough to very much”/5.14 ± 1.13, $t = 11.044$, $p < 0.01$), “The development of the employee’s knowledge, skills and personality.” (“Enough to very much”/5.29 ± 1.27, $t = 11.175$, $p < 0.01$), “The pay—the salary.” (“Enough to very much”/5.33 ± 1.11, $t = 13.089$, $p < 0.01$), “The subject of the work itself should be interesting and important.” (“Enough to very much”/5.43 ± 1.14, $t = 13.752$, $p < 0.01$), “The policies of the hotel business.” (“Enough to very much”/5.48 ± 1.06, $t = 15.315$, $p < 0.01$), “The manner of supervision by the superior.” (“Enough to very much”/5.59 ± 1.16, $t = 14.990$, $p < 0.01$), “The management of the hotel business.” (“Enough to very much”/5.68 ± 1.05, $t = 17.645$, $p < 0.01$), “Participation and a sense of responsibility.” (“Enough to very much”/5.73 ± 0.98, $t = 19.313$, $p < 0.01$), “The feeling of achieving something important (goal or purpose).” (“Enough to very much”/5.75 ± 1.04, $t = 18.448$, $p < 0.01$), “Interpersonal relationships.” (“Enough to very much”/5.81 ± 1.06, $t = 18.767$, $p < 0.01$), “The moral reward.” (“Enough to very much”/5.83 ± 0.99, $t = 20.134$, $p < 0.01$), “Security for work.” (“Enough to very much”/5.89 ± 0.90, $t = 23.121$, $p < 0.01$) and “Recognition of efforts.” (“Enough to very much”/5.98 ± 0.91, $t = 23.729$, $p < 0.01$).

The mean values per variable expressing the mean degree of Meeting Human Resources Expectations are presented in Fig. 7 in ascending order. Specifically, the respondents answered with a frequency greater than moderate in the following variables that express the degree of Meeting Human Resources Expectations: “The

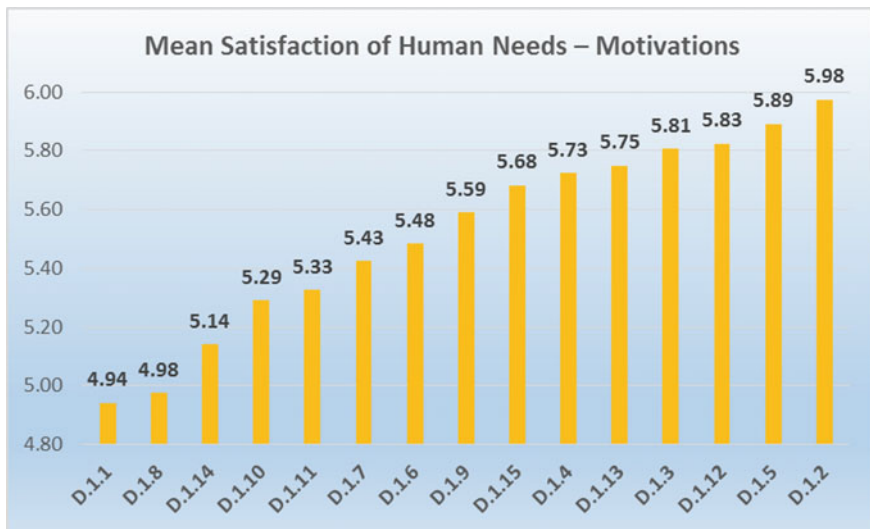


Fig. 6 Mean values of variables expressing the degree/frequency of application of basic factors of satisfaction of human needs—motivations

satisfaction of the expectations of the human resources of the hotel business [Competition]” (“Moderate to Enough”/4.53 ± 0.94, $t = 6.154, p < 0.01$), “The satisfaction of the expectations of the human resources of the hotel business, [Power]” (“Moderate to Enough”/4.81 ± 1.32, $t = 6.720, p < 0.01$), “Does the management of the hotel business know and individually meet the expectations of the human resources?” (“Enough to very much”/5.13 ± 0.89, $t = 13.784, p < 0.01$), “The satisfaction of the expectations of the human resources of the hotel business, [Prestige]” (“Enough to very much”/5.24 ± 1.01, $t = 13.434, p < 0.01$), “The satisfaction of the expectations of the human resources of the hotel business, [Achievement]” (“Enough to very much”/5.43 ± 0.96, $t = 18.286, p < 0.01$), “Do the human resources of the hotel business have expectations from their work?” (“Enough to very much”/5.48 ± 0.87, $t = 18.567, p < 0.01$), “Meeting the expectations of the human resources of the hotel business [Money]” (“Enough to very much”/5.55 ± 0.92, $t = 18.550, p < 0.01$), “Are management expectations met by HR results?” (“Enough to very much”/5.56 ± 0.92, $t = 18.475, p < 0.01$), “The satisfaction of the expectations of the human resources of the hotel business?” (“Enough to very much”/5.84 ± 0.81, $t = 24.920, p < 0.01$), “The satisfaction of the expectations of the human resources of the hotel business, [Recognition]” (“Enough to very much”/5.93 ± 0.89, $t = 23.685, p < 0.01$) and “The satisfaction of the expectations of the human resources of the hotel business [Safety]” (“Enough to very much”/5.96 ± 0.78, $t = 27.429, p < 0.01$).

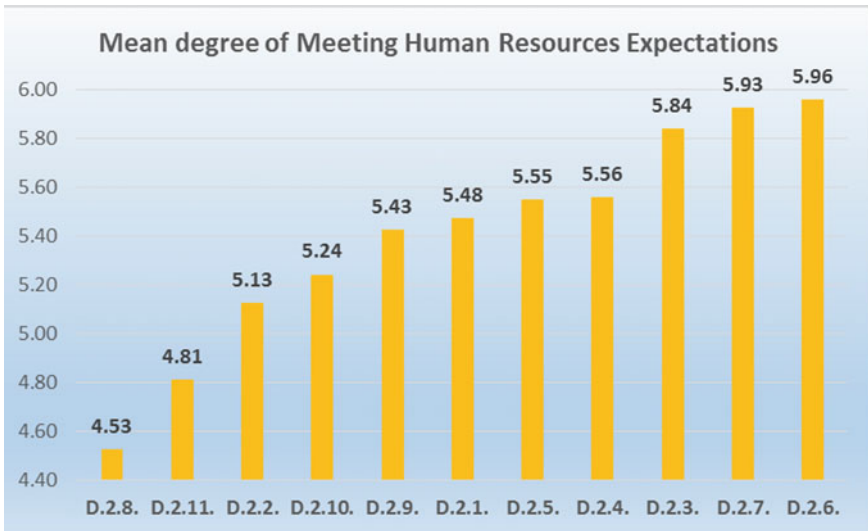


Fig. 7 Mean values of variables expressing the mean degree of meeting human resources expectations

5 Conclusions

The interest of the research is focused on those motivating factors that can influence the qualitative and quantitative performance of human resources from the execution of their work. In order for this effect to exist, motivational factors should be activated that will satisfy high-value needs of human resources in order to develop incentives that can respectively support the high-value performance of human resources. According to Herzberg's "two-factor" theory, the group of "health or maintenance" factors satisfy the satisfaction of low-value needs, which, while they do not attribute motivation to qualitative and quantitative characteristics of the work performance of human resources, but are absolutely necessary to ensure all those factors, related to their livelihood and job security, so as to reduce dissatisfaction and insecurity because, as Kuijk points out, the motivation to activate and to perform, the factors of maintenance or hygiene should also be satisfied in order to remove any dissatisfaction in the human resources (Kuijk, 2018). Thus, the human resources recklessly focus more creatively and effectively on their work tasks so that they can effectively achieve their professional and personal goals. This will be achieved with Herzberg's other group of factors, the motivating factors, which will provide the motivation (Herzberg et al., 1959).

The motivating factors that motivate human resources, through those factors that satisfy their high-value needs. The survey shows that the average of most of the hotels surveyed is 72%. In conclusion, the management of hotel companies motivates their human resources at fairly high rates with an orientation to quality incentives.

The research shows that hotel companies consider the effort of human resources important in a particular human-centered environment and their managements try to provide them, as much as possible, with the satisfaction of the maintenance or hygiene factors, so as to reduce dissatisfaction and complaints on the one hand and on the other hand to give higher performance through the motivation factors, thus satisfying the human resources their needs in higher values. The motivational factors that satisfy high-value needs are related to the recognition of their efforts, participation and sense of responsibility, to the object of their work, to the prospects of their professional development—promotions, to the development of the employee's knowledge, abilities and personality, to moral reward, to the feeling of achieving something important (goal or purpose) and to the enrichment of their work. The average of the responses (72.00%), in this group of factors, shows a fairly satisfactory level and the importance of the management of hotel companies to motivate their human resources at fairly high rates with a quality motivation orientation. Of course, in the individual responses of these factors, two factors "the object of the work itself, to be interesting and important and the prospects of professional development—promotions," show a smaller response from the management of hotel companies for the highest satisfaction of these factors.

Total quality management contributes to the satisfaction of customers' needs, considering as customers the human resources themselves, in addition to the customers who are consumers of hotel products and services, since the human

resources are the main shaper of the degree of quality that the customer will consume (Dervitsiotis, 1993, 1999).

In conclusion, the group of high-value needs satisfaction factors of the human resources are at a fairly satisfactory level on average (72.00%), but also the group of low-value needs satisfaction factors, respectively, are lower with a small difference (70.14%) at a fairly satisfactory level, which means that on the one hand, it is important that the low-value needs of the human resources are also satisfied to a satisfactory degree, because in this way, the satisfaction of high-value needs, which will yield significant benefits, will be supported seamlessly and more effectively, both in human resources and in the hotel business. On the other hand, we notice that there is enough room for improvement for a higher degree of satisfaction of the needs that activate the motivation factors.

Also, from the average values, it is observed that the satisfaction of the human resources needs is at a fairly or very satisfactory degree of coverage in the human resources, whether these needs concern the working environment, or concern the mental-emotional environment of the employee.

In addition, it is observed that in the categories 4* and 5*, there is a difference in the degree of satisfaction of the factors that activate motivation in human resources. Specifically, the hotels in category 5* show a higher response and satisfaction to the motivation factors of human resources with the satisfaction of high-value needs, which are the “creative” factors for progress, development, participation, responsibility, high interest in work, achieving an important goal, recognition, moral reward and the development of knowledge abilities and personality of the employee.

In addition, in the inciting factors, there is no differentiation in the way and degree of their activation in relation to their potency.

The satisfaction of the expectations of the human resources strengthens their efficiency and at the same time, the performance and the achievement of the objectives of the hotel business are strengthened by the satisfaction of its own expectations, through a two-way relationship.

The data from the research show that indeed the human resources have expectations from their work in a large percentage ranging at 80.84%.

Also, in a subgroup of questions that mention selected expectations, human resources show more preference for satisfying their expectations, which could satisfy high-value needs to a fairly to very satisfactory degree, such as “Achievement” at 80.80%, “Competition” at 77.50%, “Prestige” at 75.00%, “Recognition” at 74.10% and “Power”» at a rate of 55.00%. But also, the satisfaction of those expectations, which we could characterize as satisfying low-value needs, varies to a quite satisfactory degree, such as “Security” at a rate of 77.50% and “Money” at a rate of 76.6%.

In conclusion, the management of the hotel business is interested in satisfying the expectations of its human resources, in the effort to create a deeper and long-term cooperative relationship with them. Also, the management recognizes that all this effort pays off both ways, since meeting the expectations of human resources contributes to increasing the efficiency of their work.

In addition, in the two categories of 4* and 5* hotels, the recognition and satisfaction of the expectations of the human resources do not differ significantly and this is because the hotel companies of both categories face to the same degree factors related to the satisfaction of the expectations of the human resources such as, the human resources have expectations from their work which the management of the hotel company knows because it is interested in knowing what its employees expect and satisfying them accordingly; the management communicates to its employees what it expects from their work, their performance and their efficiency therefore and finally, it can be seen from their answers, the management declares itself satisfied with the productive result of its human resources. In the set of variables, category 5* and category 4* hotels show a relatively equal degree of satisfaction in the factors for meeting the expectations of human resources.

In addition, the capacity of the hotels is differentiated in terms of meeting the expectations of the human resources, specifically, the management of the hotel business in a capacity of more than 100 rooms knows the expectations of the human resources and individually satisfies their expectations and specifically in factors such as “competition” and “power.”

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Sports and Wellness Tourism

Sports Entrepreneurship and Crowdfunding in Local Communities: The Role of Social Media



Ioulia Poulaki and Mary Constantoglou

Abstract Sport is a phenomenon with evident socioeconomic implications. Sports clubs are vital for the local communities by bringing people together and providing opportunities for social interaction. However, economic recession caused particular funding problems, especially to self-funded sports clubs and individual athletes, when it comes to the depletion of their financial resources. However, the combination of digital tools and emerging forms of financing have contributed with solutions to amateur and semi-professional sports clubs, as well as to athletes competing at an individual level. Crowdfunding campaigns effectively benefit self-funded clubs, while the communication strategies through social media activate local communities, which come together to support local sports clubs. The purpose of this paper is to highlight all these elements through the case of Chios Nautical Club, which constitutes the sports emblem of Chios Island since the men's water polo team has been participating for more than four decades in the first division of this sport. With the slogan "One Team, One Island", Chios Nautical Club managed to raise a significant amount of money in a short period of time through a crowdfunding campaign by (a) using an online fundraising platform, (b) motivating the local community to join its effort through its social media and (c) offering a variety of donor incentives, prizes and rewards.

Keywords Sports entrepreneurship · Crowdfunding · Local communities · Social media · Online fundraising platforms · Fundraising

JEL Classifications L26 · M31 · Z23

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1 Introduction

According to Castratato (2011), crowdfunding is a concept that has been gaining more and more popularity in recent years. In the past, only large companies and strong financial firms had access to non-equity capital to finance their businesses. But with the advent of crowdfunding, anyone can raise money for their ventures. Of course, an important role in creating the spread and development of crowdfunding was played by the appearance of the internet and social media.

Garner et al. (2016) assert that mainly sport clubs, which are linked to and essential to local communities, are particularly benefited from this fundraising tool. However, running a sports club is a costly endeavor. There are unaffordable costs for its operation (equipment, maintenance, rent and utility bills, facilities, benefits for athletes, mobility and participation in events, promotion, etc.) depending on a club's level and goals. In fact, Krupa et al. (2020) postulate that many, if not all, sports clubs rely primarily on sponsorships and donations to raise funds, thus crowdfunding can provide an alternative source of income, which is easier and more efficient than traditional fundraising methods. Indeed, the number of sports clubs that started to resort to crowdfunding to finance their activities have been increased lately, especially when it comes to clubs in small and medium categories, which do not have their own income or a wealthy member to finance them, as the clubs competing in higher categories. Crowdfunding allows sports clubs to get in touch with their fans and supporters, giving them the opportunity to practically show their support by contributing financially to the expenses and therefore the activities of the club, which in turn gives them a sense of participation but also pride (Solntsev et al., 2019). There are several ways in which either sports clubs or individual athletes can use crowdfunding, including crowdfunding platforms dedicated to sports. At this point, it is worth mentioning that in addition to popular athletes, crowdfunding is also a useful tool for lesser-known athletes who do not have the resources to finance their training and participation in competitions. Thus, by harnessing the power of social media and online fundraising platforms, many would-be champions have been able to achieve their goals, thanks to the support of their fan-sponsors (Nesic et al., 2021).

2 Literature Review

2.1 Defining Crowdfunding

Crowdfunding is a financial mechanism that allows start-ups as well as non-profit organizations, to seek funds from the crowd through specialized online platforms (Schwienbacher & Larralde, 2010). Crowdfunding, as mentioned above, is a method of collecting funds via the Internet. This method is based on specialized platforms, where individuals seek contributions with the ultimate goal of financing their activities, plans and goals. The basic idea behind the motivation of crowdfunding is to raise

money, usually small amounts from a large number of individuals, for a project, which is either a business idea or not. This is the main difference between crowdfunding and other forms of financing. The funding process has a specific duration and can vary from a few days to a few weeks, while the goal is to reach the project's target amount before the end date of the funding campaign. Through specialized websites, individuals or entrepreneurs who need financing for their venture provide the possibility that could attract interested parties for their financing (Baeck & Collins, 2013). In the rapid development of the crowdfunding phenomenon, technological developments played a key role, which created new perspectives for user participation. Through technological developments such as social media and the creation of crowdfunding platforms, interaction between the parties involved has become possible so that a crowdfunding process can take shape.

2.2 Crowdfunding Models

Crowdfunding can be classified into four main different models, according to the revenue model. Shneor (2020) postulates that there are investment models and non-investment models of crowdfunding. In fact, from the models described below, the first two models concern non-investment ones, while the rest are investment crowdfunding models. It is worth mentioning that sports crowdfunding (especially of small or medium clubs) mainly uses the donation or reward-based models.

Donation-Based Crowdfunding

In the donation model, crowdfunding is based on the concept of donation. Donations are usually acts of altruism, without any obligation toward the funder. The method of this crowdfunding model differs from a sponsorship, in which there is almost always the concept of exchange (Baeck & Collins, 2013). Moreover, according to CMF (2012), the reward in the case of donation is different or even non-existent. In this model, individuals are driven to make a financial contribution without any expectation of reward. For example, a small-medium sports club seeking funding through a digital platform may offer rewards which could include jerseys with the club logo, invitations to a game and priority in obtaining tickets. Similarly, individual athletes may reward those who participated in their campaign with a *t*-shirt bearing the name or photo of the athlete, an invitation to a sporting event they are participating in, or even more simply a personal letter of thanks or the publication of the donor's name.

Reward-Based Crowdfunding

The reward model is one of the most popular crowdfunding models in modern times and it is based on the fact that there is an increase in interest from the public to finance new entrepreneurship projects. This model allows funders to contribute to projects and ideas in return for non-financial rewards. Reward model operates similarly to the

donation model rewarding philosophy. However, in this case, the monetary contribution far exceeds the financial value of the reward that the funder will receive. In fact, Baeck and Collins (2013) assert that usually, the larger the amount of funding, the greater the reward given to individuals. The advantage of this particular model is mainly based on the fact that the funded club or athlete is not obliged to return the money that will be collected from the public.

Lending-Based Crowdfunding

In lending models, individuals or enterprises seek funds through the use of specialized platforms, receiving small amounts from a large number of people to cover the total amount needed. According to Bradford (2012), a notable feature we find in this particular model is that there is transparency about who lends to whom. But there are also platforms, which have focused on offering interest-free or low-interest loans, while there are other platforms, which function more as investment intermediaries, leaving the lender and the borrower to decide those lending rates.

Equity Crowdfunding

This model mainly concerns enterprises and not sport clubs and it is also known as crowd-investing, investment crowdfunding and crowd equity. Equity crowdfunding better fits to medium-sized companies that are seeking a large amount of capital to launch or grow their business. In the context of an equity-based model, the funder is given an economic return usually by receiving ownership stake in the crowdfunded venture (Shneor, 2020). As Ahlers et al. (2015) state, entrepreneurs make an online open call to sell a specified amount of equity hoping to attract a large number of investors.

2.3 Crowdfunding Cases—The International Experience

The interest in Crowdfunding is growing a lot in European professional football clubs as well, which have to deal with the structural problem of the financial instability of the units they manage. In fact, it was observed that football clubs-campaigns mainly attracted their fans, who were mainly motivated by the desire to support their team and support the goal of the campaign (Kosciolek, 2021). One of the most successful examples of crowdfunding for sports clubs was the fundraising campaign launched by AFC Wimbledon, a small football club in England, in 2017. The club had not had its own stadium for over a decade and needed to raise £2 million for to finance its construction. He launched a crowdfunding campaign and within a few weeks, he raised £5 million from more than 11,000 supporters and followers. The success of this campaign shows that crowdfunding can provide the necessary funding for even the most ambitious projects (AFC Wimbledon, 2019).

Another example given by Davis (2018) is the success story of Sabrina Simader, which is indicative of the power of crowdfunding at the level of individual athletes as well. Simader was a talented alpine skier from Kenya, a country where winter sports

are not common. However, her passion and dedication to the sport saw her qualify for the 2018 Winter Olympics in Pyeongchang, South Korea. Unfortunately, her financial resources were limited, and she could not fully finance her trip; therefore, Sabrina turned to this to raise the funds she needed to travel to South Korea and realize her goal. Through various online platforms, she managed to gather a significant amount of support and even exceeded her initial monetary goal. Her story is a testament to the power of crowdfunding and its ability to break down financial barriers allowing athletes to appear on the world stage. Davis (2018) asserts that with the right mindset and digital tools, anything is possible.

2.4 The Impact of Crowdfunding and the Role of Social Media

According to Krupa et al. (2020), the ability to access funding sources for purposes such as acquiring sports equipment, covering travel costs to participate in international sports events, is an important factor in maintaining or strengthening the spirit of sports. As a result of research by Abdourazakou and Leroux-Sostenes (2016) in times of uncertainty, sponsors reduce their interest and their participation in matters of financing athletes. For example, in 2008, due to the economic crisis, many companies drastically reduced their advertising expenses (sponsorships) through the financing of athletes. At this difficult time for athletes, the tool called crowdfunding compensated for the lack of resources from sponsors. For example, the French company Intesport was the first company in France to enhance sports footage shown through an electronic platform. The research concludes that crowdfunding at that juncture deservedly replaced sponsorship. Especially amateur sports face issues of funding their activities which in some cases discourage athletes from continuing their efforts. Through crowdfunding, it is possible to finance the collective effort of an amateur team or an athlete who would otherwise stop sporting activity due to lack of resources.

However, the presence of crowdfunding as a means of financial support for a sports association also gives another resounding message, of a social dimension. Recognition of the effort and value of society's support toward non-celebrity athletes whether competing in individual sports or in teams. At the same time, the successful presence of crowdfunding gives another important message. According to Abdourazakou and Leroux-Sostenes (2016), the power of the anonymous crowd of ordinary citizens participating in a crowdfunding campaign seems to be stronger than the support of a sponsor who for their own business plans chooses not to fund an athlete or a sports team. An important fact for the athlete is the extent given through crowdfunding to the promotion of their effort, personality and goals. How important a motivation for an amateur athlete seems to be to have supporters the length and breadth of the earth following them on social media? Crowdfunding based on the power of social media communication has a different dynamic than press outreach.

Social media is the main crowdfunding enabler for sports club funding cases, since they are considered as popular tools for raising awareness of public opinion and society's interest in the development of a social institution such as the local sports club. Analyzing the basic parameters of utilizing the crowdfunding through social media in the case of a sports club:

- As mentioned by Baeck and Collins (2013), crowdfunding is a mechanism that aims to collect small amounts from a large number of individuals. The participants in a sports club campaign are non-professional investors and, in this respect, it is considered friendlier to approach them through social media.
- Small, local, sports clubs are usually characterized by a small number of fans who finance with their participation the operational needs of a club. Social media as a tool for connecting members of local communities enhances the efficiency of crowdfunding as residents of an area will enthusiastically support their local sports club (Hassna, 2022).
- The existence of an inverse relationship between economic value and social value in the case of crowdfunding in sports clubs. By using a small capital (donation), usually requested by a sports club, a large degree of social value is achieved (Meyskens & Bird, 2015).
- Observing the line of development of crowdfunding (Baeck & Collins, 2013), it is found that, although the mechanism has existed for a long time, the advantages of the method increased and gained momentum with social media development, as well as other technological innovations such as mail-outs and free blogs for effective targeting online communities with potential interest in supporting a project and lead them to a campaign with a single click.
- Also important for the effectiveness of crowdfunding is the selection of the appropriate platform in order to identify the relevant potential stakeholders. For example, *Gambitious* is a platform that funds only video games. There are plenty of platforms dedicated to sports and the features (financial mainly) of each one lead a club in choosing the one that fits better to their needs.
- Social media are based on user-friendly technologies, with possibilities of rapid updating and ease of receiving information, elements that enhance the easy acceptance of crowdfunding by a large volume of users.

Given the aforementioned, it would be very interesting to study a small local sports club, its crowdfunding endeavor and the role of social media in it. Chios Nautical Club was chosen due to the locality of the authors.

3 Methodology

The case study is one of the most extensively used strategies of qualitative social research (Priya, 2021). According to Creswell (2014), a case study allows the researcher to explore in depth an individual (or more), a program or an event, an

activity or a process, through qualitative design in order to collect detailed information for a specific period of time. This paper studies a case of sports entrepreneurship and crowdfunding in local communities, as well as the role of social media in such endeavors. More specifically, the authors explore the effort of Chios Nautical Club to be funded by the crowd, through a relevant campaign which was communicated to the public mainly through the club's social media. Chios Nautical Club constitutes the sports emblem of Chios Island since the men's water polo team has been participating for more than four decades in the first division of this sport. Additionally, many distinctions are also noted in the youth and adolescent age categories. In fact, Chios Nautical Club has more distinctions to show than any other provincial club (Chios Nautical Club, 2023). Apart from water polo, Chios Nautical Club operates swimming and sailing departments, with great honors in these sports as well. It is worth mentioning that in all sports departments of the group, academies operate with many children, demonstrating the connection of the group with the local community. To evaluate the first attempt of Chios Nautical Club to be funded by the crowd (fans, supporters, local community), the authors have selected qualitative and quantitative data directly from the club, which are presented in the section below.

4 Results

Crowdfunding campaign of Chios Nautical Club was released on November 16, 2022, while its preparation started one month earlier. The campaign lasted one month, until December 18, 2022. To run the crowdfunding campaign, Chios Nautical Club occupied an internal executive along with an external marketing professional. To promote the crowdfunding campaign Chios Nautical Club used its social media accounts (Facebook and Instagram), while the club's website was not used as a channel. The purpose of the campaign, the target amount and the methods to implement a donation was recorded on the club's posts in social media as well as on the club's home page in the crowdfunding digital platform. Additionally, the crowdfunding model followed was the reward one, as described in Sect. 2.2. More specifically, there were specific levels of donation amounts corresponding to specific rewards as follows (Table 1):

If a donor would offer €350 or more, they would join the sessions of the Board of Directors. In the case of enterprise, then this amount would ensure a sponsorship sign in the club's facilities. Furthermore, for a donation of equal or more than €50,

Table 1 Reward model of Chios nautical club crowdfunding campaign

Reward level	Donation amount	Reward
1	5	One game ticket
2	10	T-shirt with CNC logo
3	50	Season card, Club membership
4	350	CNC sponsorship sign, participation in the board of directors

the reward would be a season card. A donation of equal or more than €10, a donor would be offered a T-shirt with the club's logo, while a donation of €5 would ensure the donor a one game ticket.

As mentioned above, Chios Nautical Club crowdfunding campaign targeted the amount of €30,000, while relevant updates informed the social media followers through stories and posts about the evolution of the target achievement. Indeed, by the end of the campaign, Chios Nautical Club managed to achieve and actually exceed the target reaching €30,510 offered by 98 individuals in a donation range from €5 to €6,000, while the mode was the level of €50.

The presentation of the crowdfunding campaign is based on three axes of information that cover who is Chios Nautical Club, which is the target amount and what expenses will be covered in addition to the total budget of the club:

- *The function of CNC, as a non-profit organization, heavily relies on the support of our community. Our primary objective is to ensure the continuation of the successful history of the Club and to keep supporting and investing in the athletes of the future.*
- *Our goal is to raise €30,000, which will help cover part of our expenses for the upcoming season. Each donation is important in our effort to elevate CNC higher and to lay the foundation for the next 100 years!*
- *What expenses will we cover with these donations? The men's water polo team is celebrating 45 years in the A1 category this year. Our success comes with obligations. As a regional organization, we incur additional expenses such as travel costs for the men's water polo team, which amount to €80,000.*

When it comes to the promotion of the crowdfunding campaign, apart from the regular stories and posts (Facebook, Instagram), there were 4 sponsored ones (of specific duration) addressed to Chios residents up to 40 years old during the campaign period, updating the followers regarding the evolution of the target amount achievement (Table 2), in order to motivate more donors to support this endeavor. It is worth mentioning that Chios Nautical Club has 7200 followers on Facebook and 1270 followers on Instagram, while the crowdfunding platform used is gogetfunding.com.

Table 2 Chios nautical club crowdfunding campaign promotion actions

Date	Promotion action
16/11/2022	Crowdfunding launch in social media (sponsored 7 days)
29/11/2022	Social media update (sponsored)
30/11/2022	Crowdfunding video with CNC athletes—social media launch
5/12/2022	Game video (swimming pool and live broadcast)
5/12/2022	Social media update (sponsored 3 days)
8/12/2022	Social media update (sponsored 7 days)
16/12/2022	Social media update

Despite the sponsored promotion efforts in social media and according to the data provided by Chios Nautical Club, the response of the donors was not increased compared to regular social media updates. In fact, it is observed that the big wave of donations appeared at the start of the campaign. This can be explained as follows:

- fans and supporters of the club rushed to contribute to the effort of their favorite team from the very first days, with the result that subsequent donations were made by the local community at a slower pace.
- targeted promotion through social media should include a wider audience (residents of Chios, up to 40 years old).
- reward-based model was either not promoted properly, or the rewards for the larger amounts were not particularly attractive to potential funders.

At this point, it is worth referring to the platform used by Chios Nautical Club for its crowdfunding campaign. In fact, the first endeavor was supported by goget-funding.com. However, this platform was characterized by the campaign managers as user-unfriendly. In addition, many donors chose to donate through paypal, and thus, Chios Nautical Club had to pay double fees.

5 Conclusions

Taking into account the above analysis, we understand that crowdfunding is a phenomenon based on the development of the internet and social media. It is a way out for small business projects or social actions to bypass the traditional banking financing methods that do not finance such projects anyway and to reach another circle of non-professional investors.

However, beyond the convenience and the ability to raise funds, there are also some more important benefits, such as creativity, flexibility and less burden on the environment, as everything is done in an electronic environment.

Notwithstanding, its sociological elements, such as that of social vigilance and altruism, which modern societies may forget, seem to have a greater value. In addition, for the crowdfunding user who communicates with a wide audience, it is very important to spread the idea, to enrich it with alternatives and to encourage the effort.

There are clearly some issues that need further investigation. More specifically, these issues have to do with the following:

- Degree of satisfaction of the participants.
- Transparency in the use of the funds for the purpose for which the amounts were collected.
- Security of the personal data of the people who supported the campaign.
- The use of crowdfunding requires training in digital technology and as an element of financial technology (Fintech) requires attention to issues of fraud and illegal use.

The occurrence of such factors should first be evaluated in another research as they seem to have an impact on the effectiveness of crowdfunding.

Regarding Chios Nautical Club, the second crowdfunding campaign is currently running, which will last for two months this time and it is expected that the conclusions of this paper will contribute to the better management and promotion of the campaign in order to achieve its goal, which has now been raised to €50,000 and released through paypal.com this time, to avoid double fees. It is worth mentioning that this second crowdfunding campaign endeavor of Chios Nautical Club does not include rewards at the moment. However, campaign managers are willing to offer several types of benefits to the donors as the campaign progresses. Indeed, this action should be taken since the duration of the second campaign is longer with the aim of attracting more and more members of the local community.

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Specificities of Thermalism in Health Tourism: The Mediating Role of the Territory



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Abstract Wellness is recognized in several research studies as a common term regarding health, quality of life and satisfaction, in association with or replacing wellness. Also, the concept of quality of life is important to complement health tourism. Quality of life is useful in conceptualizing well-being by establishing links between objective and subjective features of this concept. In the search for a better quality of life, individuals look for ways to improve their well-being. In this sense and in the framework of this work, thermalism as a health activity arises as one of the most natural ways to improve well-being. Thermalism is defined as the use of natural mineral water and other complementary methods for prevention, therapy, rehabilitation or wellness. This research proposes a development strategy for thermal springs in the North of Portugal through the identification of the currently existing health and wellness, tourism, cultural and heritage attributes in the region. A qualitative

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methodology is applied, through semi-structured interviews, having as objectives to contextualize thermal tourism in health tourism and to identify the specialized thermal services available in the thermal regions of Northern Portugal. The results show the existing difficulties in the sector, namely the marked seasonality of demand and human resources, the non-diversity of age among thermal users, the lack of innovative equipment, the impact of the pandemic, the restrictions imposed on the thermal operation during the pandemic, the lack of tourist support structures, the scarcity of available and quality accommodation, the missing municipal and/or regional support, which permanently challenge the sector. In what concerns the identification of the specialized thermal services available in the thermal regions of Northern Portugal, it emerges the availability of opening services for the school community, free transportation and reception of local users in a thermal environment, specific thermal circuits; thermal massages, and differentiating treatments by the mineral-medicinal properties of the thermal waters of each geographical location.

Keywords Thermal tourism · Thermalism · Health and wellness · North of Portugal

JEL Classification Z32

1 Introduction

Tourism and health emerge from different business contexts and cultures, have divergent opinions, “speak” different languages and potentially have different views on the definition of well-being. Regardless of these divergences, the two points find common ground under the effect of well-being on tourism (Pyke et al., 2016). Well-being is used by several authors as a common term concerning health, quality of life, satisfaction and sometimes together or instead of wellness. The concept of wellness has been defined as a combination of the terms well-being and fitness (Voigt & Pforr, 2014), however, most professionals and academics use the term well-being as identified by the World Health Organization (WHO).

Along with well-being, the concept of quality of life is also important to complement health tourism. Quality of life is useful in terms of conceptualizing well-being by establishing links between objective and subjective features of this concept (Costanza et al., 2007). However, and in a generic way, the WHO has defined quality of life as “an individual’s perception of his or her position in life, in the context of the culture and value systems in which he or she lives, regarding his or her goals, expectations, standards and concerns” (Lopes et al., 2018). It is in this sense that, in the search for a better quality of life, individuals look for ways to improve their well-being. From the perspective of Karn and Swain (2017), following the adversities of everyday life, individuals are led to look for ways to restore their well-being and consequently improve their quality of life. In this sense, and within the scope of this article, thermalism as a health activity emerges as one of the most natural forms of well-being. Thermalism,

within the diversity of definitions given by various authors, can be defined, according to Decree-Law no. 142/2004 of June 11, as the use of natural mineral water and other complementary means for the purposes of prevention, therapy, rehabilitation or well-being. Within this concept, the same decree-law classifies thermals as being places where one or more natural mineral waters suitable for the practice of thermalism emerge and also defines a thermal as being the duly ordered geographical area in which there are one or more natural mineral water emergences operated by one or more thermal establishments, as well as the environmental conditions and infrastructures necessary for setting up tourism companies and the satisfaction of the needs of culture, recreation, active leisure, physical and psychological recovery ensured by the appropriate entertainment services. Within all of the aforementioned concepts, it is important to emphasize the tourist nature associated with thermal tourism, which can be seen as travel motivated by the experience of treatments and therapies based on mineral-medicinal waters and other complementary means for the purposes of prevention, rehabilitation and health promotion (Guerra, 2016). This concept allows us to contextualize thermal tourism in the light of the activity it represents today.

Thermalism went through different phases: from being an activity only available to the most privileged classes to being an activity available to the most disadvantaged classes who, through social programs, have also been able to enjoy this ancient activity; it has also gone from being an activity practiced only for the purpose of healing and regeneration to being a leisure activity and consequently motivating a type of tourism that has come to constitute a very specific segment in itself. In Portugal, these evolutionary phases of thermalism have also taken place, and after April 25, 1974, they led to the opening up of thermal establishments to all sectors of society, due to the creation of financial support programs for thermal treatments, institutionalizing the measure known as social thermalism. The result was a massive increase in demand for thermal treatments. In this way, a new combination of leisure and therapy was being created in thermal establishments.

The thermal tourism market is constantly evolving, internal and external competition is increasingly dynamic, quality and management requirements are growing and consumers are constantly looking for new solutions, new experiences and new answers to their needs (Silva, 2018). For Brandão et al. (2021), in this context of permanent change and due to the impact of the COVID-19 pandemic, new challenges are emerging, requiring the development of strategies, products and services that respond to the needs of specific market segments. This will make it possible to regain attractiveness and competitiveness at business and destination level and to strengthen the long-term sustainability of thermal tourism establishments.

According to Lopes et al. (2018), the National Strategic Tourism Plan—Review of the tourism development plan for 2015 states that there is a need to reposition the thermal product on the market. To this end, it had already been made clear in the 2007 National Strategic Tourism Plan that the business model of thermal resorts should be altered and that, along with therapeutic treatments, other services and products should be promoted to meet the needs of wellness-seeking users. The Action Plan outlined by Termas Porto e Norte de Portugal (TsPNP) sets out its vision: to develop the attractiveness of the region's thermal tourism territories; to

create value for the Termas Porto e Norte de Portugal network; and to reactivate demand in the post-COVID-19 period. This vision is based on the strategic objectives and priority axes of the operational plan. The objectives are: select and activate strategic target markets; position and activate the TsPNP brand; structure the product portfolio; increase demand and grow in value. These objectives will be supported by an operational plan based on four essential axes: brand activation; structuring and consolidating the supply; communication and promotion; and marketing.

The challenges described above as the basis for the plans created by the entities with a preponderant importance in national thermal tourism, and more specifically in the North of Portugal, motivate a problem to which this work aims to make a contribution to the debate and improvement of the sector's supply.

The objectives of this research are to understand the definition and evolution of health and wellness tourism, to understand the challenges facing the thermal tourism sector and to propose strategies for promoting this destination at national and international level.

The remainder of this paper is organized as follows: the literature review on the theme of health tourism, thermal tourism and quality of life, considering different approaches in its framework, the methodology used, the results obtained and their discussion.

2 Literature Review

According to Antunes (2008), in the beginning, health tourism did not include the concept of preventive health, only highlighted the cure. Health tourism was a procedure that, supported by the use of water and climate resources, aimed to cure physical diseases, always accompanied by forms of entertainment and leisure. The concept of health tourism only included health infrastructures that used natural, climatic or hydrological resources when providing treatments.

According to Guerra (2016), definitions of health tourism differ considerably, with some focusing on the supply side and others on the demand side. The supply-side definitions try to emphasize the structures and facilities, which include both specific health services and complementary accommodation, so that there is a tourist experience. Guerra (2016) cites as an example the perspective of Pollock and Williams (2000), who emphasize the supply side by defining health tourism as "activities that use tourism products and services that are designed to promote among consumers the improvement and maintenance of their health and well-being." On the demand side, Guerra (2016) argues that the most recent definitions have been guided by a theoretical demarcation between the concepts of medical cure and wellness, referring to two needs in which two groups of health tourists can be identified. One group consists of people who primarily travel with the need to seek a cure or treatment for a certain illness or medical condition, which is a financially interesting market for the destinations that welcome them. On the other hand, wellness tourists are those who go on vacation to maintain or improve their health and well-being, preventing

potential illnesses and practicing healthy lifestyles. In this context, it is possible to identify a set of trips whose main objective is to restore their health levels through a set of preventive practices. Also according to the Global Wellness Institute,¹ the distinction between what is considered medical tourism and wellness tourism is clearly marked by the reactive nature of the former, in contrast to the more proactive nature of the latter: while the motivation for travel in medical tourism is the desire to seek low-cost, high-quality medical care, better access to this care and the fact that it is not accessible close to home, in wellness tourism the motivation is the desire for a healthier life, disease prevention, stress reduction, management of poor lifestyle habits and/or the search for authentic experiences.

According to Brandão et al. (2021), Liberato et al. (2021) and Lopes et al. (2023), there is evidence from different studies that tourism-related experiences lead to positive psychological and physical states, improving the sense of well-being, happiness, quality of life and satisfaction with life in general. Health and wellness tourism and thermal tourism have a leading position in terms of continuous growth rates related both to the number of tourists and the economic benefits through the demand for treatments in classic thermal tourism, as well as its extension toward the leisure and relaxation side.

Although personal well-being and travel have been linked throughout history, there has been renewed interest in offering tourism products and services designed to improve quality of life as well as meet individual health needs (Chen et al., 2011).

Dimitrovski and Todorovic (2015) state that man has always needed to resort to places that provide healing and rehabilitation through natural, mineral and thermal springs and that this tradition is particularly established in Europe. According to Quintela (2004), Martins (2015) and Álvarez and Rodríguez (2015), the use of thermal waters began with the Romans, and this can be proven by the still-existing remains of these buildings where these practices took place.

In recent decades, the changes in people's professional, social and family lives have caused imbalances in their physical and psychological well-being. It is at thermal resorts, which offer body and mind recovery treatments that complement classic treatments, that individuals look for ways to recover from this agitation and aggression, which will restore their well-being and, consequently, improve their quality of life (Lopes et al., 2018). The very growth of health care has led to a more proactive approach to the use of natural thermal waters (Dimitrovski & Todorovic, 2015).

For Alpoim (2010), thermal, health and wellness therapies are becoming a trend because they are increasingly important for health tourism for three main reasons: (i) the growing average longevity of the population associated with the increase in the number of trips by the elderly; (ii) migration to large cities and the distance from nature, which causes psychosomatic imbalances (stress, anxiety, depression, among others); and (iii) sedentary lifestyles, harmful eating habits, incorrect body postures and the civilizational crisis affecting the most developed countries, which translates into a significant increase in loneliness and the affective, emotional and spiritual crisis associated with it. On the other hand, a stay in a thermal establishment

¹ <https://globalwellnessinstitute.org/>.

is experienced as a period of renewal of physical and emotional balance and an updating of socialization, lifestyles and social identities (Ferreira, 2011).

The motivations of thermal tourists have changed profoundly, as confirmed by the study on tourists' motivations for practicing thermal tourism in the North and Center of Portugal (Brandão et al., 2021; Liberato et al., 2021), which concludes that relaxation is the main motivation for practicing thermal tourism, followed by the search for psychological well-being and physical well-being. The authors confirm that these results are in line with the conclusions of Quintela (2021), who, when analyzing Portuguese thermal tourists, concluded that stress relief, relaxation and improving physical health are the main motivations for most tourists.

With regard to the travel motivations of thermal tourists, the main ones are prestigious entertainment and expectations regarding the thermal services available in the establishments, such as the equipment available, the temperature and quality of the water associated with the quality of the *staff*, the *staff's* compliance with hygiene rules, the quality of the service offered, the tranquility of the establishment, the presence of health *staff* on site to provide detailed information about the characteristics of the water and thermal equipment (Ayaz & Dag, 2017). Bastos (2011) also states that some thermal establishments have developed infrastructures appropriate to the needs of those more eager for entertainment than treatment, while others have maintained a more austere appearance and focus on their healing mission. Pinos and Shaw (2020) also highlight that many of the preventive, aesthetic and recreational treatments that have emerged in recent years can be applied without the need for daily continuity (which previous thermal treatments required), and only in a few minutes or at most a few hours.

Benjamin et al. (2020) suggest that the post-pandemic tourism industry must confront its historic role in perpetuating structural asymmetries and implement policies and practices in daily operations to ensure a safe, clean and fair environment for all its employees. Destinations must strive to recover quickly while dedicating significant resources to developing a more resilient, equitable and sustainable tourism industry.

According to Jamin et al. (2020), outbreaks of the virus have significantly reduced global tourism supply and demand, impacting tourist behavior. One of the solutions to this challenge is that tourist destinations desperately need to consolidate their image in order to encourage tourists to decide to travel. The authors concluded that there are significant positive components in health tourism that allow for rapid growth with great capabilities, and identified several attributes that can be used by tourism stakeholders and *marketers* to promote health tourism activities and encourage travel intentions in post-COVID-19 visitors.

These positive components can be used as *pull factors* to attract visitors to travel for health purposes after the end of the pandemic. One of these factors is destination image, which is a basic component in the development of tourist destinations, distinguishing one destination from another, which is vital for their success. On the other hand, from the perspective of health tourism, medical and wellness operators must ensure a positive image of their facilities and services to encourage tourist participation. Advanced technology and equipment, excellent team performance and

a high international standard of treatment, product exclusivity and highly specialized therapists are all attributes that determine image in health tourism (Jamin et al., 2020).

Also, Majeed and Ramkissoon (2020) agree that *marketers* and decision-makers will have to invest more effort and resources in promoting the image of the destination in order to improve its demand.

3 Methodology

The methodology applied in this research is qualitative, considered a well-established approach to the social sciences. Qualitative methodology has the capacity to provide rich, in-depth knowledge from multiple perspectives, together with an emphasis on empathetic understanding, especially with regard to the “how” and “why” of tourism-related experiences and phenomena (Dwyer et al., 2012). In turn, exploratory research goes beyond descriptive research in that it seeks to explain observed patterns and trends (Veal, 2018).

The instrument used to collect data and information was the individual semi-structured interviews. According to Felicity Picken (2018), the value of the interview as a method lies in a very simple premise: that talking to people is a useful way of answering a question, understanding a problem and solving it. The same author also states that although the interview is the formalization of a method that is already used in our daily lives and is part of common sense, it can make even more sense in the development of knowledge in tourism when it is systematized and accountable. The collection of information for this study was based on the construction of two interview scripts created under a structure of similar questions based on 3 generic themes: Health and well-being; Thermalism; and Complementarity strategies. The specific objectives have been included in each of the themes identified here as follows (Table 1).

Two scripts were drawn up, based on the same objectives, in order to collect data from two different sources of information, but with complementary foundations and

Table 1 Themes of the interview script in line with the specific objectives

Themes	Specific objectives
Health and well-being	<ul style="list-style-type: none"> • Understand the definition and evolution of health and wellness tourism
Thermalism	<ul style="list-style-type: none"> • Understand the challenges of the thermal tourism sector
Complementary strategies	<ul style="list-style-type: none"> • Propose strategies for promoting this destination at national and international level

Source Own elaboration

potential validation for the thermal tourism sector under study: i) thermal establishments in the north of Portugal; ii) an entity with tourism relevance in the north of the country in the thermal sector (Table 2).

The interviews were carried out during the peak tourism season for the Thermal establishments (July 2022), which made it easier to obtain specific and current data (Table 3).

Table 2 Theoretical basis of the partial interview script

Thermalism			
1	Thermal establishments	How would you characterize the evolution of this establishment’s thermal supply over the last 10 years (until 2020—pre-pandemic)?	Ferreira (2011); Kelly (2010); Lopes et al. (2018); Guerra (2016); Chi et al. (2019); Brandão et al. (2021)
	Tourism	How would you characterize the evolution of the region’s thermal supply over the last 10 years (until 2020—pre-pandemic)?	
2	Thermal establishments	What are the main changes that have taken place in this establishment since the COVID-19 pandemic?	Pollock and Williams (2000); Abbaspour et al. (2021); Pais et al. (2020); Ma et al. (2021); Benjamin et al. (2020); DGS (2020); Pinos and Shaw (2020)
	Tourism	What are the main changes to thermal tourism in the region following the COVID-19 pandemic?	
3	Thermal establishments	What changes have taken place in terms of demand for products and services at this establishment?	Brandão et al. (2021); Antunes (2006); Alpoim (2010); Ayaz and Dag (2017); Bastos (2011); Pinos and Shaw (2020); Majeed and Ramkissoon (2020); Chen et al. (2013)
	Tourism	What changes have taken place in terms of demand for products and services in the region?	
4	Thermal establishments	What communication strategy has been implemented at this establishment?	Lopes et al. (2018); Guerra (2016); Pollock and Williams (2000); Bastos (2011); Pyke et al. (2016); Gretzel et al. (2015); Huang et al. (2017); Ahani et al. (2019); Pais et al. (2020); Jamin et al. (2020); Majeed and Ramkissoon (2020)
	Tourism	What is the communication strategy implemented by the entity/organization for thermal tourism?	

Source Authors

Table 3 Identification of interviews

Interview code	Entity interviewed	Duration	Date
I1	Caldelas thermal spa	67 min	26/07/2022
I2	Chaves—termas and SPA	49 min	27/07/2022
I3	Vidago pedagogical spa	49 min	27/07/2022
I4	Monção thermal baths	64 min	29/07/2022
I5	Caldas da Saúde Thermal Spa	75 min	02/08/2022
I6	Termas da Moimenta	17 min	04/08/2022
I7	European grouping of territorial cooperation eurocity chaves-verín	n/a	05/09/2022

Source Authors

In identifying the sociodemographic data of the interviewees, it was essentially important to identify their gender, what position they held in the organization they represent, as well as to identify what areas of training each person had, to understand the suitability of the position they held and the tasks they performed. It can be seen from the information in the table below that of those responsible for the thermal establishments, only 2 people have training in the field of thermalism (thermalism technician and thermal massage technician), while the rest of the interviewees are people with higher education degrees who hold management and administrative positions in the establishments where they work (Table 4).

Table 4 Socio-demographic data of the interviewees

Interview code	Interviewee's role in the organization	Gender	Training area
I1	Technical coordination/management support	Male	Thermalism (technician)
I2	Thermal establishment management	Female	Law
I3			
I4	Thermal establishment management	Female	Tourism
I5	Executive management	Male	Management
I6	Thermal establishment management	Female	Thermal massage (technician)
I7	Director	Male	International relations, tourism and cooperation

Source Authors

4 Results

4.1 *Evolution of the Thermal Supply*

Following on from the characterization of demand, it is important to identify the evolution of the supply² by the thermal establishments. It is important to understand whether, as a result of, or following demand, thermal establishments have responded by offering products and services accordingly, or whether they have managed to anticipate and/or even influence demand through the products and services supply.³ A time frame was also established in order to separate the actions carried out by the establishment without the influence of the pandemic, since these are health and wellness establishments that could be susceptible to the changes brought about by the consequences of the pandemic.

In this sense, it can be seen that while some establishments were reacting to the demand from users and even recorded a decrease in their activity (I1; I5), here also due to the end of reimbursements for treatments decreed by the government in 2010, others were promoting their supply of services in order to respond to the growing demand they were experiencing (I2; I3; I6). There is almost universal agreement that 2019 was a very positive year for thermal establishments, with records of growth in user demand. There is also a consensus that 2020 brought an extremely abrupt slowdown in thermal activity, with a negative impact on all thermal establishments nationwide.

In line with the growth seen before the pandemic, the Eurocity Chaves-Verín classifies the evolution of the thermal supply in the region as very positive, highlighting the fact that this evolution led, in the years before the pandemic, to the creation of the region's thermal hub, making it one of the most important thermal regions on the Iberian peninsula (Table 5).

4.2 *Changes Introduced Post-COVID-19*

The COVID-19 pandemic has brought,⁴ in addition to a sharp slowdown in thermal activity, changes to the dynamics, organization and operation of thermal activity and thermal establishments.⁵ In this context, it is important to understand the impact that the pandemic has had on thermal activity to understand what changes have resulted from it and what changes have been made to thermal activity.

It is possible to see that the first and biggest impact on thermal activity ends up being financial, as in 2020, only thermal establishments were allowed to operate for

² Lopes et al. (2018).

³ Pollock and Williams (2000).

⁴ Abbaspour et al. (2021).

⁵ Pais et al. (2020).

Table 5 Summary table of answers to question 1

Question	Evidence from interviews: thermal establishments
How would you characterize the evolution of this thermal establishment's supply over the last 10 years (until 2020—pre-pandemic)?	<p>“The trend in this establishment has been steadily downwards.” (I1)</p> <p>“The year 2019 allowed us to establish a range of services that managed to attract around 7,000 users.” (I2)</p> <p>“The thermal spa has also seen an increase in demand for thermal services until 2019.” (I3)</p> <p>“Before the pandemic, the focus was on the thermal treatments most sought after by senior users.” (I4)</p> <p>“The establishment recognizes that it has been more reactive depending on demand, but there has been an evolution in the supply of treatments in the respiratory area. In 2019, with the resumption of reimbursements, the sector saw an increase in demand from users.” (I5)</p> <p>“Until 2019, the establishment recorded annual increases in demand, with 2019 being considered the year in which the establishment's supply managed to capture greater demand from users. However, in 2020 there was an extremely sharp drop due to the restrictions forced by the pandemic.” (I6)</p>
Question	Evidence from interviews: tourism Entity
How would you characterize the evolution of the region's thermal supply over the last 10 years (until 2020—pre-pandemic)?	<p>“Excellent, constantly improving and evolving. Two facilities that set the region apart stand out: the Center for the Appreciation and Transfer of Water Technology (CoLAB); and the Vidago Pedagogical Spa for Research and Development of Thermal Practices, which together with the thermal establishments of Verín-Chaves-Vidago, constitute a unique Thermal HUB in the Iberian Peninsula.” (I7)</p>

Source Authors

a short period in the summer of that year. Apart from the DGS's mandatory recommendations for thermal establishments (guideline 031/2020),⁶ most of them have not introduced any additional protection mechanisms. However, the thermal establishments confirm that they still maintain the process of prior bookings, since they recognize efficiency gains in the process implemented in terms of the organization of services, circulation of users in the establishment and work teams' management.

Eurocity Chaves-Verín itself confirms that the safety protocols adopted in terms of prevention are an asset that is still in force in the region's establishments (Table 6).

⁶ <https://www.sns.gov.pt/noticias/2020/06/15/covid-19-estabelecimentos-termais/>.

Table 6 Summary of answers to question 2

Question	Evidence from interviews: thermal establishments
<p>What are the main changes that have taken place in this thermal since the COVID-19 pandemic?</p>	<p>“The changes introduced were only those required by the DGS (renewal of natural air, separate circuits for circulation of users, social distancing, limitation of capacity, use of masks, among others). The spas currently operate by appointment only.” (I1)</p> <p>“The use of masks is still mandatory, as are all the rules and recommendations of the DGS. The obligation to book in advance is maintained, which brings efficiency gains and streamlines services for establishments. Disinfection routines are more intense and redundant.” (I2)</p> <p>“In addition to the DGS measures still in force, sprays in ENT (ear, nose and throat) treatments are still not allowed. Turkish baths are still not allowed in wellness.” (I3)</p> <p>“The establishment identifies more organizational and efficiency gains with the component of booking treatments by users. Shifts lasting 1.30 h have been created, with a maximum capacity of 40 users, always with prior booking.” (I4)</p> <p>“A risk assessment was carried out internally and the internal treatment circuit was changed. The distancing rules were changed and maintained, also due to the good adherence of users to these changes.” (I5)</p> <p>“The establishment only maintained the obligations and recommendations issued by the DGS.” (I6)</p>

(continued)

Table 6 (continued)

Question	Evidence from interviews: thermal establishments
Question	Evidence from interviews: tourism entity
What are the main changes to thermal tourism in the region following the COVID-19 pandemic?	<p>“Special preventive health protocols, for example:</p> <ul style="list-style-type: none"> • Information: inform all customers of the plan of hygiene and health prevention measures in force at all facilities: * Wearing a mask * Frequent hand washing * Minimum safety distance of 1.5 m * Proper disposal of waste (masks; gloves, among others) in the containers provided for this purpose • Medical consultation: during the medical examination, the patient’s body temperature should be checked using a non-contact thermometer <ul style="list-style-type: none"> (a) If it is lower than 37.3 °C (the limit indicated by the WHO), and if the person is going to perform thermal techniques for more than 4 days, the respective medical prescription is issued; however, if they are not going to perform thermal techniques or are going to perform them for less than 5 days, a form is given to them, which must be filled in (b) if the body temperature is higher than 37.3 °C, access to the thermal facilities is not allowed.” (I7)

Source Authors

4.3 Changes in Demand for Products and Services

Still following the set of changes introduced by the effects of the pandemic,⁷ the changes in demand themselves provide a clear signal about the consequences for the thermal sector. The answers to this question given by the thermal establishments allow us to analyze how users reacted in the post-pandemic period.

Since thermal tourism is a health activity, the way in which users themselves interact⁸ with an activity that involves some exposure of the human body to treatments carried out using water techniques, direct contact with professionals, ingestion of liquids and use of equipment shared with other people has changed. That’s why it’s perfectly normal for most of the interviewees to point to a drop in demand from users (I2; I3; I4; I5).

⁷ Majeed and Ramkissoon (2020).

⁸ Chen et al. (2013).

Table 7 Summary of answers to question 3

Question	Evidence from interviews: thermal establishments
What changes have taken place in terms of demand for products and services at this thermal?	“In the post-pandemic period, there has been some retraction in user demand for thermal therapies. This demand is still below what it was in 2019.” (I2) “There has been a slight increase in demand for wellness services. It is thought that this demand for well-being is related to the after-effects of the pandemic.” (I3) “In terms of demand for thermal treatments, there was a drop in users. There was also a greater demand from users for wellness treatments with a component aimed at mental relaxation.” (I4) “There is still a fear among classic thermal users of going back to treatments that they used to have more often before the pandemic. Currently, there is an increase in demand for respiratory and musculoskeletal treatments.” (I5)
Question	Evidence from interviews: tourism entity
What changes have taken place in terms of demand for products and services in the region?	“Looking for outdoor experiences that are not mass-produced and that take place in places with sanitary and hygiene controls.” (I7)

On the other hand, in the field of well-being, it is important to note that in the most recent period, there has been an increase in demand for well-being services focused on relaxation and physical recovery⁹ (I2; I3; I4; I5). This evidence clearly reflects the psychological and physical effects of the pandemic, due to factors such as isolation, social distancing, lack of mobility, and, in many cases, the effects of the virus on people infected with COVID-19.

It is also interesting to note that the Eurocity organization is observing a demand from users for products and services with a component of contact with nature and away from contact with groups of people (Table 7).

4.4 Communication Strategy in Place

Allied to the thermal activity is the way in which the establishment promotes its added value¹⁰ (treatments, therapies, mineral-medicinal components of its waters, products and services, among others), and simultaneously differentiates itself from the others at regional and national level, because the thermal activity can only be

⁹ Ma et al. (2021).

¹⁰ Bastos (2011).

maintained with a service provision component in its commercial sense, and it is therefore of great importance to understand how the establishment communicates with its public, how it promotes itself and how it differentiates itself from the others in the thermal and wellness panorama.¹¹

Of the establishments interviewed, all have a presence on the most prominent social networks¹² and have their own *website*, *except for* one due to logistical management issues. Only two have professional communication services implemented in their strategy (I2; I3). In addition to the social component, some establishments use other communication components¹³ with their audiences, by carrying out proximity and interaction initiatives (I2; I3; I4). Still others use the *word-of-mouth* (WOM) effect as a means of directly recommending their services (I5; I6).

At the regional level, Eurocity is sticking to the same mostly digital communication method when it comes to promoting thermal tourism, while still maintaining some of its positioning in the specialized press (Table 8).

5 Conclusions

The objectives proposed for this research were four: one general and three specifics. All these objectives are developed in this document, either through literary contextualization or through strategic definition based on the collection of testimonies as part of the methodology used. Thus, within this context, it is possible to analyze the objectives and their answers in the context of the thematic content of thermal tourism.

As far as the specific objectives are concerned, the aim of understanding the definition and evolution of health and wellness tourism was an important part of the literature review in order to first understand what the concept of health is, which is seen by the UNWTO as being “a complete state of physical, mental and social well-being and not just the absence of disease” (Pyke et al., 2016), while well-being itself, through the multiplicity of definitions, can be seen in the WHO definition as a “particular health condition that includes general well-being of body, mind and spirit, depending on its environment” (Guerra, 2016). Finally, and still according to Guerra (2016), the concept of tourism is “defined by a motivation or set of motivations, leading to temporary travel to places that have certain attributes with the capacity to attract and where those who travel carry out unpaid activities.” Regarding the evolution of health tourism itself, Antunes (2008) states that “in the beginning, health tourism did not include the concept of preventive health, it was only about healing,” which was the motivation behind the trips made by tourists who had health as their priority. Combining these two concepts, Cunha (2006) considers “those who travel for medical reasons and those who do so for preventive or well-being reasons.”

¹¹ Pyke et al. (2016).

¹² Gretzel et al. (2015); Huang et al. (2017).

¹³ Majeed and Ramkissoon (2020).

Table 8 Summary of answers to question 4

Question	Evidence from interviews: thermal establishments
<p>What communication strategy has been implemented at this thermal?</p>	<p>“The establishment currently only uses social networks as platforms for communicating with the general public.” (I1) “We use professional external communication services. We have our own website; we’re present on the main social networks, and we publish daily; during the spring and summer seasons, we promote healthy walks, offering breakfast created by the thermal’s nutritionist; we’re also present at fairs in the sector (Termatália, BTL), and at the municipality’s festivities.” (I2) “The target audience is diverse, including local users and those from outside the region. The services are also promoted to the school community in the low season. Visits to the changing rooms are also promoted.” (I3) “The establishment has social media pages (Facebook, Instagram). It also has a fully functioning website. Monthly programs offering thermal services with a thematic component have been created. Daily programs are occasionally created for visits by users of social centers in the region. We have an ongoing project to introduce the thermal theme into the region’s schools.” (I4) “The establishment has its own website and a social media page (Facebook and Instagram). Given the proximity thermal character of this establishment, the communication strategy is fundamentally aimed at this customer segment.” (I5) “The establishment has its own website and social media pages (Facebook, Instagram). However, most of the promotion is done through the WOM (<i>word of mouth</i>) effect.” (I6)</p>
Question	Evidence from interviews: tourism entity
<p>What is the communication strategy implemented by the entity/organization for thermal tourism?</p>	<p>“The presence on social networks, the online marketing channel, SEO and SEM positioning on Google, advertising campaigns in medical journals and the positioning of the destination in the health and wellness sector were reinforced.” (I7)</p>

Source Authors

As for the exercise of understanding the challenges facing the thermal tourism sector, nothing could be more identifying and comprehensive than the opinions gathered in the process of interviews with the heads of thermal establishments. The sector's difficulties were made clear by the withdrawal of state subsidies for thermal treatments from the 2010s onwards; the strong seasonality of the sector; the seasonality of human resources; the lack of age diversity among thermal users; the reduced innovative equipment; the significant impact of the pandemic on the thermal sector; the restrictions on thermal operations imposed by health authorities during the pandemic; the absence of tourist support structures; the reduced available quality accommodation; the limited municipal and/or regional support, among other constraints that mean that thermal tourism is more often seen as a challenge rather than an opportunity.

About proposing strategies to promote this destination at a national and international level, this is a point that needs to be analyzed much more from the perspective of the image of Porto and Northern Portugal than at a local level. It does not mean, however, that this is not possible, but it is clearly much more difficult to achieve in isolation than in conjunction with a region that as a whole has a significant wealth in terms of complementary offerings to thermalism, just to name a few examples: gastronomy (unique regional dishes, conventual sweets, certified products, among others); strong wine attraction (Vinho Verde area, Douro wines, Trás-os-Montes wines); rich and diverse nature (Peneda-Gerês National Park, Montesinho Natural Park, Douro River, river beaches, rivers); city tourism (Porto, Braga, Guimarães, Vila Real); religious tourism (Braga Cathedral, N.^a Sr.^a dos Remédios—Lamego, Penha—Guimarães); history and culture (Chaves, Guimarães, Porto); scenic beauty (viewpoints, cliffs, hills, observation points, among others). What this means is that the Porto and Northern Portugal destination benefits from the existence of a joint and aggregating strategy in which its operators, promoters and entities responsible for health, wellness and thermal establishments work to attract national and international visitors to the Northern Portugal territory rather than just to their thermal establishment or municipality. Hence the existence of partnerships, networking and promotion, as the overall benefit should be motivated by much more strategic thinking than just the benefit of a single party.

As far as limitations to this research are concerned, we could mention the lack of political and regional perceptions, as this is an inseparable reality when it comes to an area of great social, economic and cultural interaction, as is the case with thermalism. About the thermal establishments, and even though it was perfectly possible to obtain deeply valid testimonies for the project, it should be noted that it could have been possible to broaden the range of establishments interviewed even more, which would have allowed a different view of the reality that was collected.

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The Influence of TQM and Innovation on Perceived Financial Performance in Sport and Recreation Industry



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Abstract This study has analyzed with a single-equation setting (using OLS estimation), the impact of TQM and innovation on perceived financial performance in sport and recreation enterprises. The results pointed out that TQM has a positive and statistically significant impact on innovation, while both variables (TQM and innovation) have a positive and statistically significant impact on perceived financial performance. These results have also been verified using a system of two simultaneous equations with Seemingly Unrelated Regression (SUR) setting. Moreover, this study presents useful theoretical and managerial implications that can be used by sport and recreation services managers and practitioners to achieve better performance results.

Keywords TQM · Innovation · Sport and recreation sector · Perceived financial performance · Sport and recreation management · Sport tourism

JEL Classifications M16 · O31

1 Introduction

Sport and recreation industry is a rapidly increasing business area of sport tourism that counts on its customers' satisfaction or on the formation of added value as a result of innovative services delivery processes. Bearing that in mind, sport and recreation companies have been encouraged to make changes in order to promote their

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customers' satisfaction and loyalty (Papaioannou et al., 2023). Given that sport and recreation industry is characterized by increasing competition with other comparable companies and against other leisure activities, sport and recreation organizations should improve their service quality in order to increase their customers' satisfaction, achieve profitable outcomes and remain sustainable in the market (Chelladurai & Chang, 2000).

Concerning this, TQM is a crucial element and leads to some benefits for the sport and service enterprises and favorable outcomes (Papaioannou, 2017; Rexhepi et al., 2018). Furthermore, it seems that the implementation of TQM boosts not only innovation but also organizational survival and growth and offers financial advantages (Bon & Mustafa, 2013; Papaioannou, 2017) in sport and service sector. However, the studies on TQM, innovation and performance in the sport and recreation context are limited. This study's purpose was to examine the impact of TQM and innovation on perceived financial performance in sport and recreation enterprises.

The study seeks to measure the effect of TQM on innovation and perceived financial performance and the influence of innovation on perceived financial performance within the context of sport and recreation industry. More specifically, our study contributes to the literature on innovation and perceived financial performance by emphasizing the role that TQM plays in sport and recreation companies. It also contributes to our knowledge of TQM and innovation as key drivers of perceived financial performance within sport and recreation industry.

2 Literature Review

2.1 TQM and Innovation

Total quality management is "the holistic management philosophy aimed at continuous improvement in all functions of an organization" (Kaynak, 2003). It is a management philosophy of businesses and organizations with a customer-centric–human-centric structure that emphasizes the quality of the products and services provided and their continuous improvement. To be holistic, it includes everyone involved in the process and is applied throughout the business or organization, maintaining the effectiveness of the quality chain (customer–supplier) (Herzallah et al., 2014). This way of management has as its main objectives the satisfaction of customers and their expectations through the overall operation and performance of the business or organization (Abukhader & Onbasioglu, 2021).

Companies implementing total quality management gain a competitive advantage in the market because with this way of operating they manage to satisfy the expectations of customers in total. This customer satisfaction is long-term and contributes to the creation of loyal customers (Stoner et al., 2000). In practice, management ensures that an effort is made to continuously improve services, processes, products, work

culture, systems and communication with the aim of long-term success (Demirbag et al., 2006; Kaur et al., 2019).

In general, quality assurance programs aim to improve the overall quality of the business or organization. Firms that implement these programs seem to have more successful management through teamwork compared to other firms that do not implement quality programs (Karastathis et al., 2014).

The top managers of the business or organization have the responsibility of guiding the employees in this process of continuous performance improvement and total implementation (Hegazy, 2012). According to Walter Deming, TQM is a process and “you have to do it forever” (Cohen, 2012). To successfully implement TQM, staff at all levels should be informed and aware of the importance of continuous quality improvement in terms of processes, objectives, company competitiveness and commit to continuous improvement efforts (Rowland-Jones, 2013). The techniques that contribute to increasing the overall quality and commitment of employees as well as the innovation and financial stability of the company are quality cycles, benchmarking, empowerment and outsourcing (Rexhepi et al., 2018).

The development of innovative capabilities in a business or organization that will promote and produce skills for quality improvement requires employee training, process improvement, customer orientation, company knowledge and employee service quality management (Olaleye et al., 2021a, 2021b). Total quality management practices can connect actions and activities that have more than one purpose creating conditions for the development of innovation. Innovation is the result of connecting various practices such as research, design, product branding, continuous improvement, staff development and training, work culture and employee commitment to continuous improvement (Szeto, 2000). Additionally, the majority of the findings show that there is a positive effect of TQM on innovation (Bon & Mustafa, 2013; Papaioannou, 2017).

The research of the implementation of total quality management in small and medium-sized manufacturing enterprises revealed a positive effect of innovation on the operational performance of enterprises in Nigeria. The findings suggest that companies present continuous innovation in both processes and the final product, improving their operational performance as a whole. Business management should strengthen this positive relationship of innovation and operational processes through redesigning, developing work culture, staffing businesses with correct recruitment through revised job descriptions and staff training (Anifowose et al., 2022).

The implementation of TQM practices positively correlates innovation with the financial performance of the business or organization with continuous quality improvement. Dedicated employees create innovative ideas for products or services, constantly improving quality and meeting customer expectations to the maximum (Khalfallah et al., 2022).

Concerning the sport sector, Rial and Carral (2015) explored the application of EFQM in sport federations. Their results highlighted the benefits of the TQM implementation. They also concluded that TQM offers information regarding its features so as to be maintained or changed and developed which in turn results in improved

sport policymaking. Thus, following the previous discussion, we formulate our first research hypothesis as follows:

H1. TQM is positively related to innovation.

2.2 *TQM and Performance*

Performance is closely related to the efficient and successful operation of a business, its productivity and its growth. Factors that interact and influence performance are diverse such as leadership style and organizational culture (Kusuma & Gazali, 2023), work environment and workload (Harahap et al., 2023) and career development within the firm or the organism (Suparjo & Nurchayati, 2023). Factors that enhance performance and productivity appear to be job security, job satisfaction, motivation, reward and compensation (Niroula & Updhaya, 2023). Digital transformation, the use of technology and the acquisition or improvement of skills in this area have a positive effect on employee and organizational performance (Bancin et al., 2023). Effective work and performance are the result of the organizational structure of the business or the organization as a whole and are influenced by all the factors mentioned above. Employees produce qualitative and quantitative work and are committed to continuous improvement when the management style is aligned in this direction (Sa'adah & Rijanti, 2022).

TQM is a way of management where senior management is committed to guiding employees in a continuous improvement of all processes, services and products (Kumar & Sharma, 2017), with the ultimate goal of satisfying customer requirements and expectations (Agus & Selvaraj, 2020). When this top management commitment is not strong, then the implementation of this model is not successful (Sá & Oliveira, 2013). For the successful implementation of TQM, many practices have been identified (Alawag et al., 2023) such as: leadership (Banuro et al., 2017), customer focus (Oliveira et al., 2019), human resource management (HRM) (Rajput, 2022), process management (Samawi et al., 2018), information analysis (Aquilani et al., 2017) and continuous improvement (Kumar & Sharma, 2017). These practices are useful tools that help the operational process as a whole, contributing to the performance of employees, achieving continuous improvement of quality and performance (Banuro et al., 2017).

The results of the study by Lehyani et al. (2023) supported the positive relationship of TQM to employee performance in companies in Tunisia. These results have been supported by previous studies (Al-Harazneh & Sila, 2021; Budur & Poturak, 2021; Iqbal & Asrar-ul-Haq, 2017; Usrof & Elmorsey, 2016) that have shown that focusing on customer satisfaction and their expectations has a positive impact on performance and efficiency. Continuous improvement in a company is very closely related to the work and corporate culture that encourages employees to express themselves freely, to create and innovate, to reward excellence, to share their knowledge and to improve their performance (Oliveira et al., 2019). The positive relationship of TQM and performance has been supported by many researches in different fields, sizes of

companies and organizations where they all proved that with the implementation of TQM practices there is an improvement in quality and performance (Papaioannou et al., 2020; Sila, 2020; Sioutou et al., 2017).

Regarding the sport industry, there has been a study concerning the TQM and organizational performance. The findings highlighted the positive relation between the TQM and the performance. Additionally, it was pointed out that the efficient application of TQM practices in the sport sector is essential and emphasizes the sustainability within sport context (Papaioannou et al., 2020). Based on those arguments, we develop our second research hypothesis as follows:

H2. TQM is positively related to perceived financial performance.

2.3 Innovation and Performance

According to the literature, innovation is the way to adopt a new idea or behavior. Innovation can include services, processes, products, organizational issues which can be adopted in terms of continuous improvement and meeting customer needs (Antunes et al., 2017).

Process innovation refers to continuous improvement practices for business competitiveness. The relationship between innovation and performance has been investigated by many studies (Antunes et al., 2017; Olaleye et al., 2021a, 2021b, etc.) and their positive relationship was supported. Managerial innovation and financial performance are positively related as innovative solutions help to overcome obstacles and take advantage of emerging opportunities (Bossche & Segers, 2013). Following the literature, the firms usually adopt innovative process strategies to improve their operational and financial performance (Antunes et al., 2017; Maistry et al., 2017).

Innovation is a necessity in the modern business environment for both operational and financial performances of the business or organization (Papaioannou et al., 2023). New ideas add value to business sustainability; new service business models and continuous improvement are positively associated with financial performance (Winand et al., 2016).

In the field of sports, research results showed that innovation in organizational matters in sports clubs has a positive effect on both the performance of sports clubs and their management (Escamilla-Fajardo et al., 2021). Similar results were also found in research on private sport centers where a strong positive association between innovation and financial performance of companies was observed (Papaioannou et al., 2021, 2023). Financial performance in the sport sector is linked to three HRM practices related to employee empowerment, organizational culture and leadership style. Bearing that in mind, senior managers in sports businesses should ensure with the corresponding management practices, a stable environment with trust, good communication and encouragement so as to give the opportunity to their employees to create innovative ideas and work with satisfaction and success (Papaioannou et al., 2012, 2023). A positive work environment favors innovation and business performance in all financial, operational and organizational areas (Papaioannou et al., 2017; Robaki

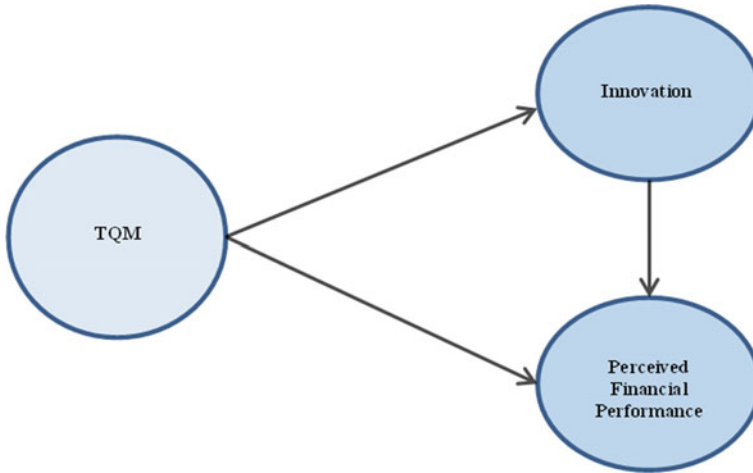


Fig. 1 Model of the study. *Source(s)* Authors' elaboration

et al., 2020). Thus, following evidence on the literature, we state our third research hypothesis as follows:

H3. Innovation is positively related to perceived financial performance.

The concepts and associations proposed in the three hypotheses declared above are concisely depicted in the following Fig. 1.

3 Methodology

Given the lack of an official database of all sport and recreation enterprises in Greece, the data for this research was selected using a questionnaire targeting sport and recreation enterprises within the Greece, via an opportunistic sample. The particular approach enabled the identification of a target population of 406 sport and recreation enterprises. The final participation in the research included 286 managers, having a 70% response rate. The questionnaires were analyzed by means of SPSS 28 and STATA 13. Apart from reliability analysis with the Cronbach's coefficient, explanatory factor analysis (EFA) was also conducted to test the validity of the estimated factors.

The questionnaire included 24 questions and was developed by Papaioannou et al. (2017) based on the literature on TQM (Sashkin & Kiser, 1992), innovation strategy (Abdi & Ali, 2013) and perceived financial performance, measured by satisfaction levels in relation to specific KPI's such as profit, ROI, sales volume and market share (Papaioannou et al., 2023). More specifically, the questionnaire comprises the following key units:

1. Total quality management (6 questions).

2. Innovation (6 questions).
3. Perceived financial performance (12 questions).

The questions were answered using a five-point Likert Scale. In order to examine the association between TQM and innovation, and their impact on perceived financial performance, we have estimated the following cross-sectional OLS regression models with robust standard errors:

$$\text{INNOVATION}_i = a_0 + a_1\text{TQM}_i + e_i, \quad (1)$$

$$\text{PERF}_i = \beta_0 + \beta_1\text{INNOVATION}_i + u_i, \quad (2)$$

$$\text{PERF}_i = \gamma_0 + \gamma_1\text{INNOVATION}_i + \gamma_2\text{TQM}_i + u_i. \quad (3)$$

Model (1) captures the impact of TQM factor on innovation factor, and according to our first research hypothesis, we expect a positive and statistically significant coefficient. Similarly, Eq. (2) examines the impact of the innovation factor on perceived financial performance (PERF); thus, a positive coefficient on this variable will verify our third research hypothesis and indicate that innovation contributes positively to financial performance. Model (3) considers TQM and innovation factors jointly as determinants of perceived performance and aims to cover for any loss of statistical significance caused by the separate estimation of the two independent variables, thus examining the second research hypothesis.

Finally, as a sensitivity test, Models (1) and (2) will be estimated jointly as a system of equation using the seemingly unrelated regression method (SUR). According to Papaioannou et al. (2023), the SUR research design is useful for gaining efficiency since we expect the error terms across Eqs. (1) and (2) to be contemporaneously correlated. The Breusch and Pagan (1980) test of independence was estimated for examining whether the application of the SUR method contributes a gain in efficiency. The Breusch–Pagan test yields a highly significant Chi-square statistic (37.68) which is highly significant at the 1% level, suggesting that the implementation of the SUR method is more efficient than the separate estimation of Eqs. (1) and (2) (Table 1).

Table 1 Explanatory factor analysis

Factors	KMO	Bartlett χ^2 test	Eigenvalue	Alpha	% Variance
FIN_PERF	0.935	2447.8* (0.001)	9.085	0.962	76.44
INNOVATION	0.854	617.18* (0.001)	3.475	0.888	69.55
TQM	0.857	1327.9* (0.001)	5.988	0.893	77.19

Note Authors own elaboration. *P*-values in parenthesis. * Indicates statistical significance at the 1% significance level

4 Results

The survey involved a total of 286 respondents, male ($n = 146, 51.2\%$) and female ($n = 140, 48.8\%$) managers participated in the study, where the median age was 37 years. Participants were mostly university graduates, having more than 6 years of work experience. Table 2 presents the Pearson (below the diagonal) and Spearman (above the diagonal) correlation coefficients. All correlation coefficients were statistically significant at least at the 1% significance level. Statistically significant correlations worth mentioning are between perceived financial performance (FIN_PERF) and innovation with a correlation coefficient $r = 0.76$. Also, FIN_PERF is positively correlated to total quality management (TQM) with a correlation coefficient of $r = 0.84$. These initial results provide some support to our research hypotheses suggesting that TQM and innovation practices are positively associated to perceived financial performance.

Principal component analysis (PCA) was performed on the question responses and three factors were identified and extracted using the Varimax rotation and the Anderson–Rubin method. Table 1 presents the results of the factor analysis, and a detailed description of factors and eigenvalues loads. All estimated factors have KMO’s and Cronbach’s alpha larger than 0.80, and the Bartlett test of sphericity is highly significant. Also, all eigenvalues are above 1 and the percentage of variance explained by the factors ranges from 0.69 (for innovation) to 0.77 (for TQM). Factor 1 corresponds to perceived financial performance (FIN_PERF) with 76.44% percentage variance and eigenvalue equals to 9.085 and is based on twelve items capturing the perceived profit, revenues, market share and return on investment performance for each business based on its current goals, last year’s performance and performance relative to their main competitors. Factor 2 corresponds to innovation (INNOVATION) with a percentage variance 69.55% and eigenvalue 3.475 within six items referring to innovation implemented within the business. Factor 3 corresponds to total quality management (TQM) with a percentage variance of 77.19% and eigenvalue of 5.988 within six items capturing the impact of total quality practices on innovation and perceived financial performance.

Table 3 presents the cross-sectional OLS estimation of Models (1)–(3) with robust standard errors. On Model (1), TQM coefficient is positive and highly significant at the 1% level indicating that total quality management practices contribute positively

Table 2 Correlation coefficients

Factors	FIN_PERF	INNOVATION	TQM
FIN_PERF	1	0.765	0.826
INNOVATION	0.760	1	0.885
TQM	0.840	0.848	1

Note Authors own elaboration. Pearson correlation coefficients are below the diagonal and Spearman rank correlations are above the diagonal. All correlation coefficients are statistically significant at the 1% significant level

to innovation. The estimation of Model (2) produced a positive and statistically significant coefficient on the innovation (INNOVATION) variable, verifying our third research hypothesis, indicating that innovation contributes positively to perceived financial performance. Similar results were extracted after estimating Model (3) where both INNOVATION and TQM are included in the equation. Both independent variables produced positive and significant coefficients, with TQM presenting the largest impact on financial performance, relative to INNOVATION. These results corroborate our main second research hypotheses.

Table 4 presents the results of the seemingly unrelated regression (SUR), for checking the robustness of the main findings of the previous Table 3. Equation 1 includes innovation (INNOVATION) as the dependent variable and TQM as the independent variable. Chi² statistic is highly significant at the 1% significance level, and the R² of the first equation is almost 72% suggesting that the independent variable explains a large percentage on the variation of the INNOVATION factor. Specifically, the regression coefficient (0.874 for TQM) was positive and statistically significant suggesting that total quality management impacts positively on the firms' innovation supporting our first research hypothesis. Moving on to the second equation, perceived financial performance (FIN_PERF) is the dependent variable and INNOVATION the independent variable. Again, the Chi² statistic is highly significant at the 1% significance level, and the R² of the second equation is 55% which is very satisfactory for this type of analysis. The regression coefficient on INNOVATION is positive and highly significant at the 1% significance level (0.913), corroborating the third research hypothesis, and indicates that innovation contributes positively to perceived financial performance. Finally, the regression coefficient on TQM is positive and highly significant at the 1% significance level (0.697), verifying the second research hypothesis, and indicates that total quality management contributes positively to perceived financial performance.

Table 3 Cross-section OLS regression results

Variables	Model 1	Model 2	Model 3
	Dependent variable: INNOVATION	Dependent variable: PERF	Dependent variable: PERF
Constant	0.006 (0.01)	-0.005 (-0.01)	0.006 (0.02)
INNOVATION		0.760*** (14.81)	0.169* (1.75)
TQM	0.848*** (17.37)		0.697*** (8.10)
F-stat	301.87***	219.30***	224.55***
R ² -adjusted	0.719	0.578	0.714

Note T-tests in parenthesis. ***, **, * Indicate statistical significance at the 1, 5 and 10% significance level, respectively

Table 4 Seemingly unrelated regression (SUR) results

Variables			
Equation 1—Dep. variable: INNOVATION			
	Coef	z-stat	$P > z $
TQM	0.874**	21.87	0.001
Constant	0.001	0.01	0.998
R^2	0.718		
Chi ² (p -value)	478.24** (0.001)		
Equation 2—Dep. variable: PERF			
	Coef	z-stat	$P > z $
INNOVATION	0.913**	18.64	0.001
TQM	0.697**	8.80	0.001
Constant	−0.002	−0.01	0.999
R^2	0.554		
Chi ² (p -value)	347.44** (0.001)		
Breusch–Pagan test of independence	Chi ² (p -value)		37.68** (0.001)

Note P -values in parenthesis. ** Indicate statistical significance at the 1% significance level

5 Conclusion

The current study intended to examine the impact of TQM on innovation and perceived financial performance as well as the effect of innovation on perceived financial performance in sport and recreation enterprises.

The sport and recreation enterprises' viability depends on their competence to successfully adapt to their environmental instability, complexity and variability. Thus, TQM and innovation comprise vitally important elements to assure their effectiveness and organizational performance as suggested by the literature (Khalfallah et al., 2022; Papaioannou et al., 2023).

This study validated that TQM impacts positively on the sport and recreation enterprises' innovative strategy and perceived financial performance (as shown in Table 4), supporting our first two research hypotheses H 1 and H 2. H 3 was also supported as innovation had a significant impact on perceived financial performance of sport and recreation enterprises.

Theoretical and Managerial Implications

The results of the study pointed out that TQM significantly influenced the innovation and perceived financial performance of sport and recreation industry. Concerning the sport and recreation enterprises, it seems that their managers used specific, structured quality improvement tools and techniques to measure and improve the quality, while the employees of sport and recreation enterprises received appropriate training on tools and techniques for improving service quality. Moreover, on the one hand, the leadership of the sport and recreation enterprises was committed in providing quality services to their customers and on the other hand has set a long-term plan which referred to the service quality improvement. Eventually, the sport and recreation

enterprises included all their human resources in the quality improvement process and had a service quality improvement plan within their strategic planning, which in turn led to better perceived financial performance (Papaioannou, 2017; Sashkin & Kiser, 1992). These findings concur with previous research, which refers to the influential role of TQM on innovation and perceived financial performance in the sport and service sector (Rexhepi et al., 2018; Rial & Carral, 2015; Papaioannou et al., 2020) regarding the influence of TQM on innovation and perceived financial performance in the sport and service sector. Additionally, the researchers pointed out that understanding of TQM makes available information to fields so as to be sustained or transformed and improved as well as facilitates the effective application of sport policy in sport services (Rial & Carral, 2015), while many other scholars have claimed that TQM practices serve as a platform for the development of innovation and improved performance in sport and service organizations (Anifowose et al., 2022; Khalfallah et al., 2022; Papaioannou et al., 2020).

Lastly, the results illustrated that innovation had a positive and noteworthy effect on perceived financial performance of sport and recreation industry. It seems that sport and recreation industry included not only new services as key objective of their innovation strategy but also new ideas regarding the organizations' service delivery. Furthermore, the managers of the sport and recreation enterprises had a proactive and supportive role during the development and implementation of their innovation strategy by ensuring the involvement of all their employees in the process to get the highest results from the adoption of service quality delivery system, so as to delight their customers and achieved better performance (Papaioannou et al., 2023). This is lined up with Escamilla-Fajardo et al. (2021) and Papaioannou et al. (2023) who also found that innovation is considerably associated to sport service firms' performance. Moreover, they recommended that innovation is an essential point of sport service firms' performance that assures their sustainability via their service differentiation.

The existing study demonstrated that higher levels of innovation and perceived financial performance are related to the TQM. Considering that TQM in sport and recreation industry has been shown to generate promising effects regarding the innovation and performance, the managers should enhance their commitment to quality initiatives and their visible participation and be in favor of continuous improvement efforts of the whole organization. Moreover, they should apply TQM in every stage of the development of sport and recreation enterprises and utilize TQM as a fundamental part of the management decision-making process (Papaioannou et al., 2020; Sashkin & Kiser, 1992).

Another noteworthy result of this study was that innovation considerably influenced perceived financial performance of the sport and recreation industry. Therefore, sport managers should play a facilitative role concerning the development of novel ideas through the use of electronic information systems, within the organization and the utilization of various types of innovation, which could be correlated with beneficial outcomes. A prerequisite is the formation of diverse kinds of cognizance, which would broaden the availability of services and activities offered by the sport and recreation enterprises so as to reinforce their effectiveness (Escamilla-Fajardo et al., 2021; Papaioannou et al., 2023).

Limitations and Future Research

The study was delimited to the sport and recreation enterprises. Data for the existing study were only collected from the sport and recreation enterprises and there was no attempt to generalize this information to all sport organizations.

Replication of the existing research should be done, using other dimensions of performance. Areas of further research could also include measuring the impact of TQM and innovation on the consumers' loyalty. Qualitative assessment of TQM techniques and innovation strategy could be done in the future to the same population which appears to be needed to ensure their sustainability. Further research could emphasize on whether different types of innovation impact performance within sport and recreation industry.

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Hiking Tourism in Greece: A Legal Approach



Polyxeni Moira, Dimitrios Mylonopoulos, and Aikaterini Kontoudaki

Abstract Hiking is a physical activity aimed at recreation and improvement of the physical condition. As a general rule, this activity is carried out during holidays. However, hiking is often the main motivation for making the trip. Carrying out hiking as a leisure activity requires not only the existence of suitable hiking trails and supporting infrastructure, but also the establishment of the appropriate institutional framework. In this study, the institutional framework of hiking as an outdoor leisure activity, the institutional framework of supporting infrastructure as well as recent institutional arrangements in Greece are analyzed over time.

Keywords Hiking · Recreation · Mountain refuges · Hiking paths

JEL Classification K00 · K32 · L83 · Z38

1 Introduction

Hiking, i.e., walking in nature, is a natural human activity, which is carried out with the aim of entertainment, training and improving one's physical condition. The ability to walk significant distances without feeling tired encourages other activities, such as bird watching, photography and enjoying the natural and cultural environment. In addition, hiking is often a prerequisite for other activities, such as camping, hunting, cross-country skiing or orienteering¹ and generally recreational activities in nature.

Hiking is often the main motivation for making a trip. In this case, *hiking tourism* is developed as a special form of tourism (Dreyer et al., 2010, In Gousios, 2017). For

¹ Orienteering is the activity of orientation and following of a direction, using a compass and a map.

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many researchers, hiking tourism is the “outdoor activity related to vacations and includes shorter or longer walking tours in natural and cultural landscapes, often in rural areas” (Nordbo et al., 2014).

In recent years, Long-Distance Hiking (LDH) has been developing as a popular leisure activity, being the fastest growing activity in Europe and the USA (Hardiman & Burgin, 2015). This activity is even considered as an integral part of special forms of tourism, such as adventure tourism (Breedie, 2003; Weber, 2001) and sports tourism (Den Breejen, 2007; Lum et al., 2020). Moreover, the activities connected with trekking are considered as ecological and compatible with the protection of the environment and wildlife (Brockelman & Dearden, 1990).

In Europe, hiking is one of the most popular holiday and leisure activities (CBI, 2021). Hikers usually choose a destination based on the opportunities it offers to enjoy this activity. According to studies, more than three million hikers are active in France and Italy, while in the UK they amount to ten million. Kouchener and Lyard (2000) argue that more than 30% of Swedes and 50% of Britons regularly engage in hiking. In 2019, ~ 3.31 million Germans over the age of 14 stated that they hike in their free time several times a month (Koptuyug, 2021). Research shows that those interested in hiking and mountaineering are a significant segment of the adventure tourism market, both for mild and more extreme forms (Loverseed, 1997).

Furthermore, according to Moira et al. (2021), based on a survey conducted in 2021, the members of a hiking group of Athens stated that, although their main motivation is the contact with nature, during their excursions, they also visit archaeological sites, monuments, museums, wineries and other rural facilities as well as religious sites, which proves that there are important incentives to get to know the local culture and tradition. In this respect, hiking tourism is a special tourist activity and is distinguished by its alternative element, in contrast to the massiveness of other tourist activities.

The changes in the life of modern man, the alienation from nature and living in prison cities have led to a search for activities that combine physical exercise and contact with the natural environment (De Oliveira-Matos et al., 2017). Studies demonstrate that hikers are mainly residents of big cities, looking for a way out of the pressures of the contemporary way of life and interested in original, genuine and authentic experiences (Alberts & Hazen, 2010; Santamarina & Moncusí, 2014; Silverman, 2015). Thus, the motivations for carrying out the activity of hiking refer to the need for contact with nature, contact with unspoiled environments, isolation, peace and quiet, escape from everyday life (Den Breejen, 2007; Goldenberg et al., 2008; Moira et al., 2021), obtaining and maintaining a good physical condition through sport, improving mental health (Hill et al., 2009; Moira et al., 2021), having spiritual experiences and quality of life (Seonjeong et al., 2018), recreation, self-development, camaraderie, etc. According to Svarstad (2010), three categories of motivations for hiking are identified, namely recreation, criticism of the modern lifestyle and interconnection with the traditional way of life.

2 Conceptual Definition

The study of the relevant literature highlighted several difficulties in the conceptual definition of the terms related to the wider content of hiking. The terms used in the international literature are usually “hiking” and “trekking”, but the term “walking” is also found (e.g., the European Ramblers Association website refers to “walking”). In the Oxford dictionary (2021), the term “trekking” is defined as moving of a person mainly on foot, encountering difficulty or discomfort.

Essentially the term “trekking” refers to the activity of mountain hiking that is characterized by a higher degree of difficulty than hiking, that is, simple hiking, which is considered an easier activity compared to trekking and mountaineering. In the Greek language, both terms are rendered as “hiking”. The rendering of the term on the website of Visit Greece (2021) is “simple” and “mountain” hiking, with the first referring to traveling at a minimum distance of 5 km and on a terrain with a very slight slope (150–300 m), while the second is referring to covering a distance of 15–20 km on a route with greater altitude differences (500–600 m). According to the World Tourism Organization (UNWTO, 2019), hiking and trekking are considered as forms of hiking tourism.

According to experienced hikers, hiking trails are, more or less, smooth, with different levels of difficulty, the routes last half a day or the whole day (day hiking type), while usually the starting point/point of departure and termination is the same. Trekking, in terms of degree of difficulty, is between hiking and mountaineering. The main difference lies in the length of the route. It does not necessarily involve climbing, and it mostly requires walking, but often climbing is needed to reach some points. Trekking takes several days, no clear routes are followed and often there are not paths, while the route has altitude differences. Trekking requires more endurance and camping overnight. The areas chosen usually are not connected through transportation networks and are completely natural and “unspoiled”. Trekking takes place in large mountain ranges, such as the Himalayas, the Andes and the Alps. The next and more difficult form of trekking is mountaineering, which is not linked to the distance but to the altitude difference of the route that exceeds 600 m (Moira et al., 2021). Trekking often takes place in mountain ranges but also in other geomorphological formations, such as deserts, tropical areas, glaciers, polar areas, swamps and volcanoes, and is combined with visits to cultural monuments, religious monuments, pilgrimages (Moira, 2019), etc. In conclusion, hiking involves both a physical and a spiritual element, namely, a good physical condition and mental discipline.

3 Actors of Hiking

As the activity of hiking continues to gain ground, hikers are constantly looking for new environments and new routes. The European Ramblers Association has been created as the European Union of Walkers to support the hiking activity at European

level. The association consists of 65 walking associations from 35 European countries, with more than 3 million members. It was founded in 2004, in Germany, with the aim of opening and maintaining European long-distance trails, which cross the European continent. At the same time, the Association's objectives include the protection of the countryside, the environment and the cultural heritage (ERA-EWV-FERP, 2021). The European trails, which are marked with the letter E, are Long-Distance Hiking trails that cross the European continent. For a trail to be included in this category, it must cross at least three counties and be recognized by the ERA. The marking and maintenance of the path are implemented by the member states, in accordance with the institutional framework in force. In some countries, this is a responsibility of private bodies, e.g., associations, while in other countries it falls within the competence of public bodies, e.g., municipalities, communities, or tourism organizations. In Europe, there are 12 E routes/paths, named E1–E12.

In 1984, two European long-distance trails, namely E4 and E6 (Fig. 1), were defined to end in Greece, after cooperation of the Greek Mountaineering Federation (GMF) and the European Mountain Walking Association (EWV). Thus, the gradual signaling of these paths began with funding from the Greek National Tourism Organization (GNTO) and of each individual route by GMF.

The E4 trail starts in the Pyrenees, crosses France, Switzerland and Bulgaria and then reaches the Greek border. It crosses Greece from Florina to Gythio and continues to Crete. The route can be divided into three sections, namely the northern section, the southern section and the island section. The northern section crosses the area from Florina to Delphi, the southern section from Delphi to Gythio and the island section covers the area of Crete (Moira, 2018).

The E6 path starts from Finland, crosses Denmark, Germany, Austria, Slovenia, and it reaches Greece and, crossing the country from west to east, ends in Alexandroupolis. The Greek section has two branches. The first section starts from the city of Igoumenitsa, and through Dodoni, Ioannina and Kastoria, it reaches Prespes. The second section starts from the region of Florina, crosses the mountainous regions of western, central and eastern Macedonia and reaches the city of Alexandroupolis, in the region of Thrace (Moira, 2018).

In Greece, the Hellenic Federation of Mountaineering and Climbing (EEOA) and the Federation of Naturist Mountaineering Excursion Societies of Greece (OFOESE) operate at the level of a federation. The Hellenic Federation of Mountaineering and Climbing has 81 members (EEOA, 2022) that operate in the form of a club or association with various objects, such as mountaineering, climbing and skiing, where ecology and feeling of nature are often mentioned. In Federation there are 43 members that also operate in the form of a club or association, with equally various objects, such as feeling of nature, hiking, mountaineering and culture.

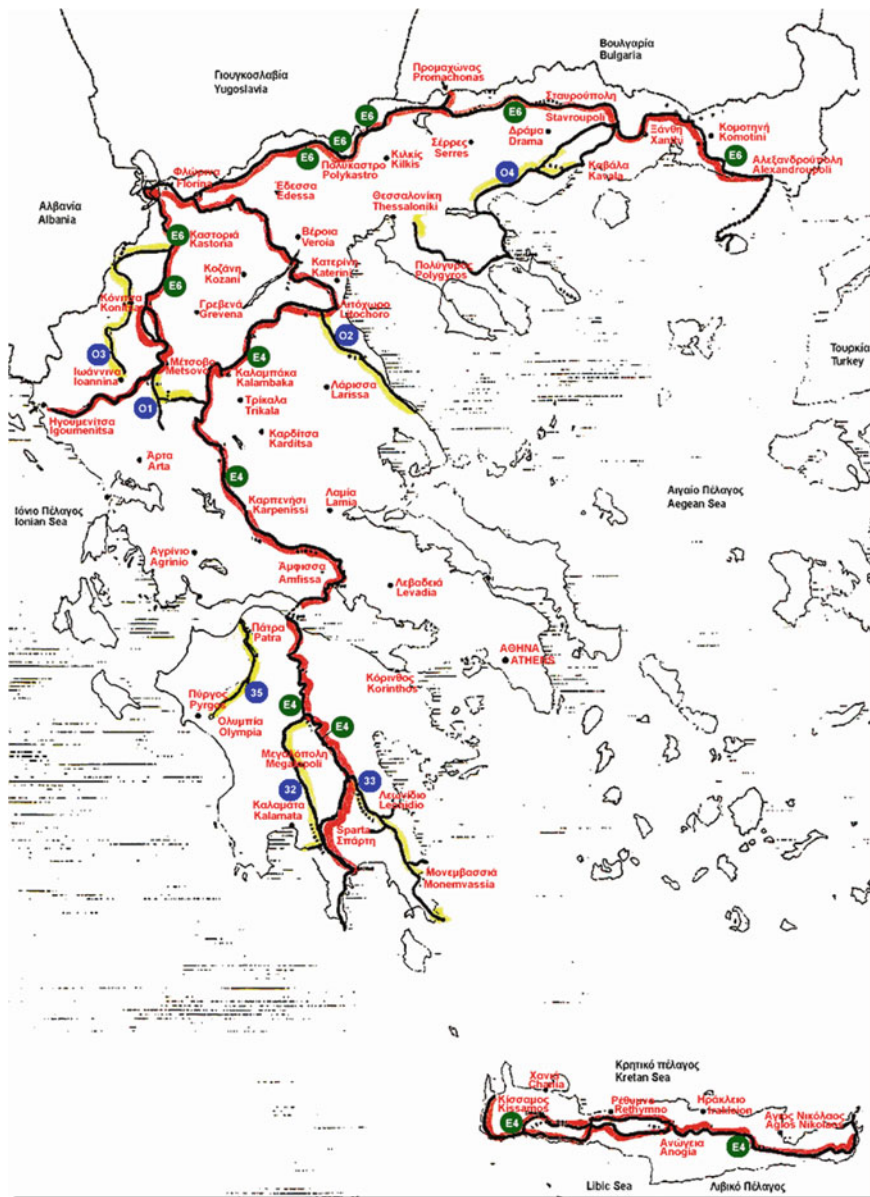


Fig. 1 European long-distance paths E4 and E6 in Greece. Source Oreivatein (1997–2017)

4 Mountain Refuges

The need of hikers and climbers to find shelter in the mountains led to the creation of mountain shelters. Mountain shelters began to be constructed at the end of the 1920s, and in the same period, the first excursion association, the Greek Mountaineering Association (ΕΟΣ) of Athens was created.

The first mountain refuge was erected in 1930 on Mount Olympus at the Balcony location (Olympus Refuge I “Spilios Agapitos”), and King Pavlos attended its inauguration. The following year, shelters were created in Parnassos and Panachaikos, in 1932, in Helmos and Oiti, in 1933, in Ziria, in 1937, in Parnitha, Taygetos, Panachaikos and Mitsikeli, in 1938, in the Stavros area, in Olympos and in Hortiatu and in 1939, in Pangaeo and Kissavos. In the following years, the construction of mountain shelters was halted due to wars and economic difficulties (Climbing the World’s Mountains, 2017). During the Second World War, many buildings were built as shelters in the mountains to serve the needs of the army.

The first references on hiking and shelters to the Greek legislation are made indirectly in various texts, such as in article 16, par. 3 of CL 864/1937, which grants the right to the Greek Mountaineering Association to establish and operate shelters at an altitude of more than 1000 m, for the overnight stay of mountaineers. In addition, the buildings that had been erected in the mountains at an altitude of more than 1000 m were given to the Greek Mountaineering Association to be used as mountain refuges, according to CL 771/1945 (Government Gazette A’321). Of course, due to the social and political conditions, this building was not built after issuing a building permit. This omission was not corrected in the following years, with the result that mountain refuges continued to operate without the required building permit.

RD 436 of June 25 July 6, 1961, has provided for the possibility of classifying the mountain refuge as a tourism business. Later, Law 2160/1993 (article 2, par. 3) included mountain refuges in the facilities of special tourism infrastructure. In L. 3105/2003, article 40, par. 1 indirect reference is also made to hiking. In particular, for a building to be defined as a “mountain refuge”, it is required that the facility is located at an altitude of more than 900 m, has up to 80 beds and serves *hiking*, *mountaineering* and climbing. The operation and purpose of the mountain refuge are further determined by the content of the provision of article 1 of the Regulation of Mountain Refuges, which came into force with MD 2868/2004 (Government Gazette B’398), issued based on par. 8, article 40 of L. 3105/2003. According to said Regulation, the mountain refuge is (a) a building facility with a capacity of up to 80 beds, (b) located at an altitude of over 900 m and (c) with its main purpose being the daily or few days’ service not only of mountaineers, *climbers* and *hikers*, but, additionally, nature lovers, skiers and nature researchers. In addition, the inclusion of mountain refuges in the facilities of special tourism infrastructure was reiterated in L. 4276/2014. Furthermore, based on the Joint Ministerial Decision 23948/2015, mountain refuges can be either a permanent construction, guarded or unguarded, or emergency mountain shelters.

The conceptual definition of the mountain refuge was confirmed by the newest L. 4280/2014 (Government Gazette A'159) and its content was expended to generally include all forms of mountain tourism activity² (article 56). In execution of the provisions of L. 4280/2014 and L. 4519/2018, a multitude of ministerial decisions has been issued, which legalize mountain refuges that have not been granted the necessary Special Operation Label. Within this institutional framework, the management bodies of mountain refuges can be either Greek Mountaineering-Climbing Federation, or associations of climbers, hikers or organizations of local administration first and second degree.

Mountain refuges are accessible either through public or forest road (where they exist) or mainly through *mountain paths*. According to the legislation in force, the marking and maintenance of the paths fall within the competence of management bodies of the refuges in cooperation with the relevant forestry services and the Greek Mountaineering-Climbing Federation. During the time, as of the creation of the first mountain shelter until October 2022, 20 mountain refuges have been legalized.

5 Mountain Paths

Mountain-hiking paths are laid out to promote forest recreation, mountain tourism and ecotourism. Mountain paths facilitate access to inaccessible areas in the countryside and traditional settlements. At the same time, they contribute to the promotion of natural and cultural heritage and citizens' awareness raising for their better protection. The paths can cross, in addition to mountainous, semi-mountainous and lowland areas, lakeside, coastal and riverside natural landscapes as well as protected areas or any type of habitat. Potentially dangerous to walkers' paths (e.g., active bogs) or paths that host sensitive species of flora and fauna (e.g., hibernating, resting or nursing bat caves) are excluded.

According to L. 4280/2014, article 36, *hiking trails* are considered those that are marked and used for hiking either in the Greek territory (national trails) or as parts of international trails that cross several countries (such as the European trails E4 and E6). Furthermore, according to the Ministerial Decision no 151344/165/2017 (Government Gazette B'206), mountain-hiking trails are distinguished based on their use, access areas, length, degree of difficulty and type.

- A. Based on the *access area and length*, the paths are divided into (a1) long-distance paths and (a2) short-distance paths.

The long-distance paths are long routes that cross mountainous but not only mountainous regions. In part, they may coincide with county, rural and forest roads or with old paths. They cross mountains, forests, rivers, canyons, springs, lakes, caves,

² In particular, according to article 36, L. 4280/2014 (Government Gazette A'159), "a mountain refuge is a building facility with a capacity of up to eighty beds, at an altitude of over nine hundred meters, which serves hiking, mountaineering, climbing, and generally all mountain tourism activity".

geological formations, etc. Moreover, they pass through traditional settlements, archeological and historical sites, accommodation and transport hubs.

The short-distance paths cover various needs of the mountain populations as well as nature visitors. They pass through particular areas of mountain masses, usually following the “foot to the top” course, traversing mountain villages, mountain refuges, climbing fields, canyons and other isolated routes. They also approach natural or cultural attractions.

B. By criterion of *importance*, the paths are divided into (b1) primary and (b2) secondary.

The primary mountain-hiking paths are the ones of great importance that combine all purposes of mountain paths. They satisfy both the needs of forest recreation and the access needs of hard-to-reach areas. They are also characterized by their long length, degree of difficulty and frequency of use and serve more social groups. The form of these paths is linear, i.e., they start from a certain area (provincial or forest road) and end in another area, at a specific point of the road network.

The secondary mountain-hiking paths are mainly offshoots of the primaries, so they are shorter. Their existence is due to the need to access specific isolated points, or they have a hiking, touring or educational nature. They can be *blind*, i.e., they end in a dead end, so the hiker must return from the same path to the point where she/he started, either *circular*, that is, the starting point coincides with the end, but without requiring to use the same path to return to the starting point or *linear*, uniting two primary paths.

C. Based on the *purpose*, the paths are divided into (c1) recreational routes, (c2) educational–thematic routes, (c3) cycling routes, (c4) routes accessible to people with disabilities, (c5) livelihood paths and (c6) special “technical routes”.

The *recreational/entertainment routes* ($E = Enter$) are addressed to hikers and nature lovers, who mainly wish to explore an area and enjoy nature.

The *educational/learn–thematic routes* ($L = Learn$) are addressed to visitors, who wish to get to know and be informed about the natural and cultural environment of an area. Said paths include particular natural and cultural resources, e.g., landscapes, streams, archeological sites, old stone bridges, monasteries, churches, etc.

In addition, these routes may be linked to exceptional traditional production processes (e.g., wine routes, tobacco routes, olive routes, etc.). In some cases, the destination is a cultural event (e.g., fair, festival, etc.) and in others the route itself is a cultural feature (e.g., historic route, cobblestone, etc.). This category also includes the educational routes related to the study of the nature (plants, trees, water cycle, reptiles, insects, birds, interdependence of species, food chain, geological formations, geomorphology, etc.).

The *cycling routes* ($B = Bike$) have the characteristics of recreational routes as well as additional special characteristics, making them suitable and attractive for cycling. A necessary condition to be defined as such is that they do not cross protected areas, if this not provided for in their management plans, and that there are no steps or steps of stairs along the route.

The *routes accessible to people with disabilities (Amea)* may be part of one of the above categories, but they may also be specially constructed paths with the purpose of serving this category of users or therapeutic purposes. Special construction specifications may apply to these paths or parts of these paths, which are used either primarily or exclusively by people with limited mobility. According to the access they provide, said paths are marked on the information signs placed at the starting point of the route.

The *livelihood paths* have been created to serve the daily needs and activities of rural communities, leading to cultivated estates, water mills, pastures, stables, forests for logging, etc. The marking of these paths is not mandatory.

The so-called “*technical paths*” are an additional category, also known as “*via feratta*”. These paths cross steep slopes or steep rock slopes. In these paths, moving and safety of the user are achieved through artificial means (metal steps and grips, and safety cables). The use of safety equipment is required by each user. Said paths are used only by trained mountaineers or by hikers accompanied by a Mountain Guide. For their setting and maintenance, specific construction specifications are in place.

D. According to the *degree of difficulty*, the paths are divided into easy, medium, hard or very hard paths.³

The definition as *easy* refers to paths with sufficient width and a smooth slope, that are easy to cross. These paths are suitable for all ages, regardless of physical condition.

The paths marked as *of medium difficulty* present a moderate degree of difficulty and are suitable for adults in good physical condition. Abrupt changes in slope (uphill/downhill) are few, while only a short length of the path is in narrow or rough terrain.

Paths marked as *hard* are of a high degree of difficulty. The route is on a difficult terrain (rough or slippery or narrow or steep terrain) and with sharp changes in slopes (uphills/downhills). These paths are suitable for adults in good to very good physical condition.

Finally, the paths marked as very hard to follow have all the characteristics of the previous category, but, in addition, the hiker must use her/his hands to continue the path. These paths are suitable for adults in very good to excellent physical condition.

Marking of Paths. The marking of mountain-hiking paths is essential to ensure a safe hiking experience. Signage must be adequate, clear and precise, two-way and placed at appropriate density. In addition, it must provide the visitor with all the necessary information about the mountain path in Greek and English, without excluding the use of a third language, if deemed necessary, depending on the nationality of the visitors. In paths that are addressed also to people with visual impairments, the marking must be suitable for them.

³ The respective terms to determine the degree of difficulty used in the Ministerial Decision are easy–medium–hard–very hard.

Signs and signs with pictures, geometric shapes and colors are used to mark the paths. The distance at which the signs should be placed depends on the topography of the ground and the existing vegetation.

The signs are further divided into reception signs, direction signs, location signs, warning signs and certification signs.

Reception signs are placed at the start and end of each route (path) in order to provide the necessary information, e.g., length or duration of the route, altitude, degree of difficulty, starting and ending points of the path (locations), parking spaces (number and distances). In addition, signs highlight any increased risks, traffic ban because for example, of high probability of fire, presence of wild animals and shepherd dogs.

Direction signs must be adequate and two-way and placed in easy-to-see points, perpendicular to the axis of the path, regardless of the direction of the walker, at such a height that they can be seen from a distance (Fig. 2).

Location signs inform the visitor for the location they are in. They are placed in parking areas or in places where the characteristics of the route change significantly, warning the visitor (e.g., changes in the degree of difficulty, altitude, vegetation, etc.).

The *warning signs* are placed so as to inform in time about possible dangers at the access points, e.g., dangerous route due to possible landslide or steep slopes, risks of falling rocks, etc. These signs are also placed when emergency incidents are recorded at the beginning and end of each route (e.g., destruction of the deck due to severe weather, etc.). Where necessary, they also remind the rules of good behavior of the visitor, etc. Finally, they point out the paths of personal responsibility.



Fig. 2 Marking of paths. Direction sign. Source Dinacha 71, Wikipedia

The *information signs* inform the visitor about selected elements of the ecosystem–environment, e.g., plants (name and photo), rocks, ecology, but also historical and cultural elements.

The *certification labels* provide information about route maintenance, the maintenance person, etc. and are constantly updated.

Supervision and Management. As a rule, mountain-hiking paths cross forests or forest lands and their construction or maintenance works constitute forestry works (article 16, L. 998/79). In this case, the forestry service is the competent authority. However, apart from the forest service, the responsibility for the construction and maintenance of mountain-hiking paths lies with the local administration, first and second degree, the management authorities of protected areas and the competent service of the Ministry of Tourism. In addition, the mountaineers’, hikers’ and climbers’ associations, associations for the protection of the environment, hunting and cycling clubs and associations, the Greek Mountaineering–Climbing Federation as well as the Social Cooperative Enterprises of Collective and Productive Purpose are also responsible. For the optimal management of the paths, a “Sustainability Fund” of the network of the paths is established by the competent management authority.

6 Hiking as a Tourist Activity

The Greek state, realizing the special interest of the country’s visitors to get to know and experience, in greater depth and detail, the contact with nature and the countryside, characterized *hiking* as a tourist activity and included it in the special form of rural tourism.⁴ With the Act for Thematic Tourism, the state seeks to establish the appropriate framework of safety rules so that visitors can enjoy authentic experiences—experiential tourism. By stipulating the law for thematic tourism, the Ministry of Tourism of Greece aims to extend the tourism season, enrich and diversify the national tourism product, support the local economies and provide high-quality added-value services to the visitors–tourists.

Within the framework of the modernized institutional framework of tourism, the thematic tourism Law 4582/2018⁵ introduces the concept of rural tourism. Any special form of tourism, linked to the acquisition of authentic experiences during the contact of the visitor–tourist with nature and the countryside, is defined as rural tourism. Rural tourism is divided into agrotourism, wine tourism, ecotourism–green tourism, *sightseeing routes–hiking*, geotourism and fishing tourism (Fig. 3).

⁴ N. 4582/2028 (Government Gazette A’ 208) “Thematic tourism—Special forms of tourism—Regulations for the modernization of the institutional framework in the field of tourism and tourism education—Support for tourism entrepreneurship and other provisions”.

⁵ The thematic tourism law 4582/2018, together with the tourism law 2160/1993 and the newer tourism law 4276/2014, constitutes the three basic legislative acts of tourism (Mylonopoulos, 2021, pp. 53, 127, 334).

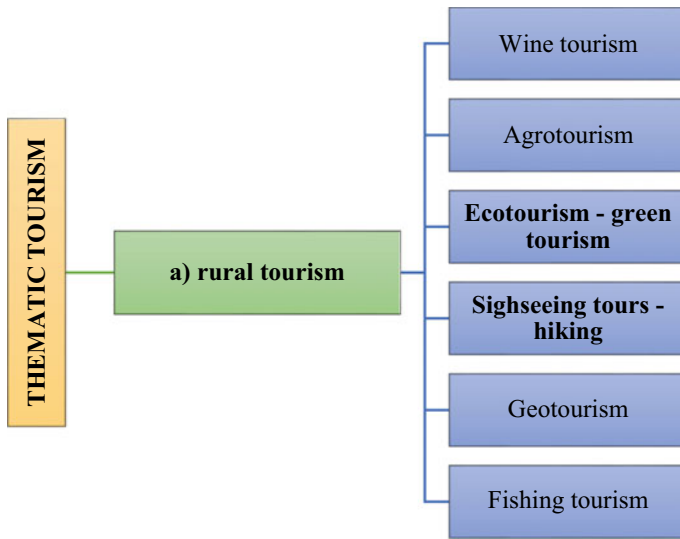


Fig. 3 Categories of rural tourism L. 4582/2018

According to said law (article 4 par. 6), sightseeing tours involving hiking are the most specific form of tourism that develops on mountain—hiking paths. This form of tourism includes the set of activities related to visiting points of interest in the countryside with the aim of being acquainted with the natural and cultural heritage of each place, promoting its special characteristics and raising the awareness of the citizens for its protection.

It should be noted that the legislator in par. 5 of the same article (article 4, L. 4582/2018) includes hiking in the activities of *ecotourism—green tourism*. Ecotourism—green tourism is the most specific form of rural tourism, which is connected to various forms of tourist activity in nature and develops in areas of ecological interest, and recognized ecological value, such as national parks, Ramsar wetlands, areas of the Natura 2000 framework and other protected areas. In particular, ecotourism—green tourism includes touring, hiking, observing and photographing ecosystems and other leisure activities that are organized in the natural environment, have the element of adventure, do not disturb the environmental balance of the area and are educational and scientific in nature.

Moreover, in article 6 of said law, *hiking* is included in outdoor sports adventure activities, as a subcategory of sports tourism. According to article 6 par. 1, sports tourism is defined as the form of tourism, which takes place with active or passive participation in sports leisure activities that visitors—tourists choose in the tourism destinations of their holidays, with the aim of entertainment and improving their health, fitness and well-being, and includes active recreational sports activity and passive watching of a sports activity.

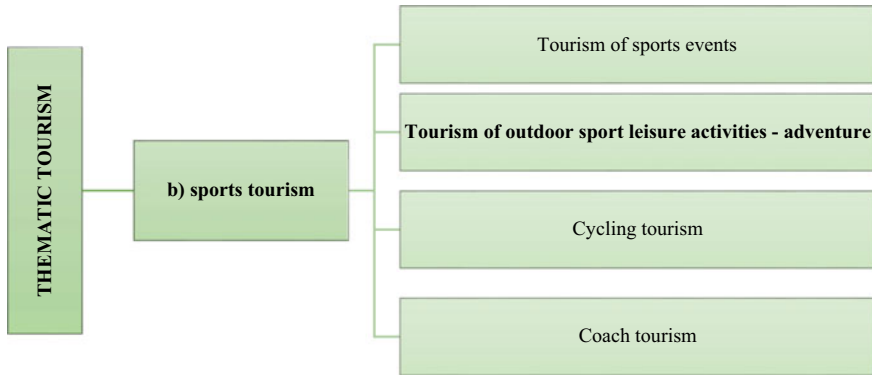


Fig. 4 Categories of sports tourism L. 4582/2018

Furthermore, sports tourism is divided into tourism of sports events and tourism of outdoor sports adventure activities—adventure tourism (Fig. 4). Outdoor sports-adventure activities are developed in the sea, lakes and rivers, in mountainous and semi-mountainous areas, as well as in urban and semi-urban areas. For instance, land based adventure sports include mountaineering, trekking, rock climbing, snow skiing, and mountain biking. Air based adventure sports refer to paragliding, parasailing, and sky diving/parachuting. Water based adventure sports include rafting, kayaking, canoeing, jet skiing, sailing and rowing. Among others, hiking is included in the context of outdoor activities with their main element being the mild nature of the activity.⁶

7 Conclusion

The recreation sector–leisure industry is a broad field of action for private activity, which usually precedes the public initiative to introduce the necessary regulation. The multifaceted nature of leisure activities involves the inherent weakness of appropriate proactive legislation. In fact, it is often argued that the legislator’s attempt to deal with this negative reality may result in legislative confusion, being detrimental to legal clarity.

Hiking is included in the multi-level framework of leisure activities of mild action, and in recent years, it has been developing as a popular activity both at national and international levels. Within the perspective of sustainable tourism development, the Greek legislator, based on the existing legal framework for mountain refuges and mountain-hiking paths, included, with the thematic tourism law, hiking as a special and ecofriendly tourism activity, in rural tourism.

⁶ Walking riding, running, archery, swimming with equipment, familiarization and building trust games.

However, there is an ambiguity regarding the clear responsibility for the supervision and management of the paths, that is, which agent has the exclusive responsibility for managing the hiking paths, so that the most rational prevention and management of the adversities of the natural environment is achieved. Moreover, after reinvigorating the related legal framework, there is no clear legislative act providing for carrying out the corresponding professional activity as a responsible escort or hiking guide.

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Glamping in Greece: Preliminary Findings from a Mixed-Methods Approach



Athina Nella and Foteini Dimopoulou

Abstract Glamping combines nature-exploration activities with luxury amenities (Lee et al., in *J Hosp Tour Manage* 40:88–93, 2019) while privacy is considered a critical aspect for glampers (Lyu et al., in *Int J Tour Res* 22:155–167, 2020). As a relatively new tourism phenomenon, glamping is an under-researched area (Adamovich et al., in *J Environ Manage Tour* 6(54):1431–1441, 2021) though market knowledge is recognized as essential to design improved glamping operations and experiences (Brochado and Brochado, *J Hosp Tour Technol* 10:15–27, 2019; Lu et al., in *Int J Hosp Manage* 95:102919, 2021; Lu et al., in *Tour Recreat Res* 1–19, 2022). This study examines glamping in Greece by presenting preliminary findings from a recent mixed-methods research. The research aim was to examine and compare perceptions about glamping from a two-sided perspective, i.e., supply side and demand side. Critical aspects of the glamping experience, glampers' profiles and motives, growth prospects and perceived impact of the pandemic in relation to the glamping market were some of the main research foci. From the supply side, qualitative research took the form of 14 in-depth interviews with glamping executives. As for the demand side, 211 respondents, both Greeks and foreigners, participated in a survey focusing on tourists' perceptions about glamping. Glampers' profiling reveals high levels of education, income and environmental consciousness. As per glampers' primary motives and expectations, they seek authenticity, sustainability, serenity and escapism; nature and sea-centered-activities are prerequisites while spa and yoga options are highly appreciated. Both studies showed positive behavioral intentions and promising glamping development prospects in a post-covid setting while more emphasis should be put in targeted communications to increase awareness of the glamping offering.

Keywords Glamping · Luxury · Pandemic · Tourist behavior · Greece

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587

JEL Classification L83

1 Introduction

Glamorous camping, also known as glamping, is an ecotourism activity that comprises both great escapes and comfort. It is considered a niche tourism segment that goes hand in hand with sustainability, as glampers seek authentic experiences in the destination they are visiting while also appreciating and respecting the surrounding natural environment. As Boscoboinik and Bourquard (2012) note, glamping is a concept that can be tailored to various settings and destinations but the core of the experience is linked to outdoor escapism, comfort and respect for the environment. Lu et al. (2022) confirmed the close association of glamping with comfort even in non-glampers' minds. Brochado and Brochado (2019) supported that the glamping product offering addresses to the market niche that seeks to indulge in the positives of camping while minimizing the negatives.

The global glamping market size is expanding quite fastly and is anticipated to reach USD 5.93 billion by 2030 (Grand View Research, 2023). Craig and Karabas (2021) have confirmed that the prospects of the USA and Canada glamping markets continue to be positive during and after the pandemic while Europe has been characterized as the trendsetter of the glamping market (Xiang et al., 2023).

As the respective product offerings evolved and became enriched, a variety of options has become available for visitors interested to enjoy the glamping experience. According to the Glamping Hub (www.glampinghub.com), numerous types of accommodation offerings are available around the globe: cabins, tented cabins, safari tents, caravans, tiny houses, domes, cottages, log cabins, yurts, tree houses, bell tents, beach houses, containers, boats, caves, cabooses, hobbit houses, private islands, bubbles, huts, igloos, pods, floating homes, tipis, towers, nature lodges, barns and airstreams. According to the website, North America is the region where the number of listed available options surpass any other place of the world. The World Bank (2019) acknowledges glamping as a nature-based tourism form that—when exclusive and luxurious—can appeal to the high-end, “ecolux” market segment.

2 Literature Review

Glamping, a newly emerged form of outdoor, nature-close activity, took its initial form from the African safaris where demanding European and American travelers chose luxurious tents for their staying, an experience enriched by chefs, guides, porters and butlers (Brooker & Joppe, 2013). According to Craig (2020), the broader concept of camping is an under-studied tourism sector, although it is the outdoor vacation activity most often enjoyed by people around the world (O'Neil et al.,

2010). Sun and Huang (2022) agree that despite its popularity, glamping has not received adequate research attention.

As noted by Brooker and Joppe (2013, p. 1), the outdoor hospitality sector “*sparked by personal and interpersonal needs for escape, socialization, freedom and discovery and pulled by product and service improvements, has repositioned itself as an alternative form of accommodation or lifestyle.*” Within this context, Caldicott et al. (2022) characterize camping as a field with growing complexity. Brochado and Pereira (2017) identified five facets of service quality dimensions in glamping experiences: tangibles, staff, nature-based experiences, food and activities.

The unexpected setting caused in the tourism market due to the pandemic seemed to urge scholars to reexamine this form of tourism, which promised adequate safety and comfort measures. Sommer (2020) examined the two forms in the context of domestic tourism. Sánchez-Sánchez and Sánchez-Sánchez (2022) showed that the geographical location of the destination where the campsite is located has proved important after the pandemic with natural areas gaining tourists’ preferences when compared to coastal areas.

Sun and Huang (2022 attempted to clarify the atmospheric scene dimension of glamping and sorted out the typical image of glamping) while characterizing it as very atmospheric and also linked to the aesthetics of atmosphere theory. Gross et al. (2023) focused their interest on the profiles of tourists attracted to deep-nature glamping, an accommodation supported on a wooden platform that can be rented in a remote natural location without neighboring guests. Xiang et al. (2023) from a Chinese perspective applied the theory of interactive ritual chains (IRCs) to glamping to finally confirm emotional energy and flow experience as driving forces of interaction rituals.

3 Research Aim and Methodology

Qualitative research has been used in a number of studies focusing on glamping tourism behavior (e.g. Lu et al., 2021, 2022; Sun & Huang, 2022; Xiang et al., 2023) while mixed methods have also been chosen from researchers studying the glamping phenomenon (e.g. Brochado & Pereira, 2017; Brochado & Brochado, 2019).

There is limited knowledge about glamping in Greece (Dimopoulou, 2023; Fafouti, 2022; Konorta, 2021). The present study, conducted in the first semester of 2023, sheds light on the topic, by answering research questions evolving around the following pillars: main selection criteria for glamping resorts, glampers’ profile and motives, prospects and priorities for further market growth, impact of glamping on destination image and post-pandemic perceptions about glamping’s advantages.

A mixed-methods approach was applied. In-depth semi-structured interviews were conducted with experienced glamping executives from Greece, each representing a company operating in the Greek glamping market. In parallel, a survey was conducted among tourists aware of the glamping concept. In the context of snow-ball sampling, respondents were asked to complete a self-administered structured

e-questionnaire shared through social media from the researchers and the participating glamping businesses. Initially, 305 respondents accepted the call of survey completion. A filter question at the beginning of the questionnaire was used to exclude respondents who were not aware of the glamping concept. It proved that 211 respondents (69.2% of the total) were familiar with the concept of glamping, and they were the ones who continued with the completion of the questionnaire.

Content analysis was used to analyze responses from the in-depth interviews while SPSS was used for data analysis of survey responses. Given the level of glamping development in Greece and the small number of glamping businesses operating in the country, this study can be considered as exploratory, aiming to diagnose the state of play of the Greek glamping market. Selected preliminary results are presented in the following section.

4 Data Analysis and Preliminary Findings

Content analysis was performed for the semi-structured interviews with the supply-side executives. Glamping executives agreed that their offering is primarily chosen because it provides direct contact with nature and at the same time privacy to the guests who seek that. Special constructions and amenities, which differentiate from the mainstream hotel options, offer a unique and unprecedented experience and are the main choice drivers. Moreover, the recreational and sports activities that take place in the natural environment act as allures for visitors. Word of mouth and e-word of mouth are considered as powerful tools in the specific market, and the use of social media is expanding on behalf of the Greek glamping businesses, in an effort to promote their product more effectively and achieve properly targeted communications. In terms of communication message and content, the experiences, benefits and differentiation of glamping from other forms of alternative tourism need to be emphasized further. Glamping is also considered as an important drive for the growth of local economies.

Analysis of qualitative results showed that glampers' expectations include enjoying activities to explore the nature and history of the destination. Glampers get excited when they taste local organic products and discover the off-the beaten track paths of a destination. In terms of customer profiling, based on market executives' perceptions, glampers are described as well educated, belonging to high-income categories with no particular age group prevailing in terms of representation. In terms of motives and preferences, they seem to love nature and authenticity while seeking a more sustainable way of life. Glamping executives confirmed that tourists' preferences were affected from the pandemic and that they have noticed an obvious increase in their customer base during the last three years. In the post-pandemic era, glampers seem to prioritize safety, tranquility and privacy.

As for the demand perspective and the analysis of survey results, almost 32% of the 211 respondents knew at least one glamping venue operating in Greece and 18% had at least one previous glamping experience. Glamping facilities located in

Table 1 Rating of recent glamping experiences in the aspects of (i) accommodation, (ii) dining options, (iii) sport or recreational activities, (iv) hygiene protocols, (v) sense of safety, (vi) staff friendliness and (vii) additional facilities

N	Valid	38	38	38	38	38	38	38
	missing	0	0	0	0	0	0	0
Mean		4.03	3.45	3.45	3.87	3.76	3.97	3.26
Std. deviation		0.788	1.132	1.005	0.844	1.025	0.944	1.309

less crowded areas are preferred while environmentally friendly infrastructure and privacy are highly appreciated as contributing factors to relaxation and tranquility of visitors. Sea and outdoor activities are also considered as important selection criteria for glamping vacation. The most popular answers concerning additional services to enrich the glamping experience included hiking, yoga, gymnastics, spa services, water activities, hiking, horse riding and cycling.

Overall, positive behavioral intentions for glamping were expressed from the majority of respondents, with 66% claiming a positive intention to choose a glamping experience in the near future. As for glamping selection barriers, the most commonly mentioned were high prices, limited glamping options in the country, limited information about glamping options and safety. Lower prices combined with flexible booking practices are important facilitators in tourists’ decision making process. It is also worth noting that approximately, 42% of the sample agreed that the pandemic has constituted glamping accommodation a more attractive option.

Respondents with previous glamping experiences ($N = 38$) were asked to rate on a scale from 1 to 5 their more recent experience in the following aspects: accommodation, dining options, sport or recreational activities, hygiene protocols, sense of safety, staff friendliness and additional facilities. As shown in Table 1, the highest ratings were for the aspects of accommodation and staff friendliness (avg 4.02 and 3.97, respectively) while the lowest ratings were for additional facilities, dining options, sport or recreational activities (avg 3.26, 3.44 and 3.44, respectively).

In terms of perceived importance (scale 1 to 5) of factors for choosing a specific glamping venue, the most highly rated were the following: offering customized services and experiences (3.48/5), using environmentally friendly practices and processes (3.43/5) and securing privacy (3.42/5).

5 Concluding Remarks

This study, based on a mixed-methods approach, offers some initial useful insights for the Greek glamping market. Glamping is an emerging tourism market with a positive footprint on the surrounding destination and local economy. Glamping is considered as a special experience due to the unique combination of nature and luxury it offers. Glampers seem to prefer activities close to nature, such as hiking and cycling while

spa services and yoga courses are considered as important allures for an enhanced glamping experience. This study's findings are consistent with critical service quality dimensions previously identified by Brochado and Pereira (2017). What also derives from the research findings is the need for Greek glamping companies to enhance tourists' awareness of glamping, mainly through digital marketing and the suitable content for well-selected and targeted tourists. The post-pandemic setting creates positive growth prospects for the glamping offering in Greece. Further research will enhance existing knowledge for glampers' profiles and tourist behavior.

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Football Stadiums as Alternative Tourists' Entertainment Points of Interest: The Perceptions of Managers and Local Authorities in the City of Patras



Alkiviadis Panagopoulos, Vasiliki Matika, and Ioannis A. Nikas

Abstract Football stadiums, especially those located in urban areas, host games of local and international tournaments, attracting fans to attend and express their loyalty to the team. Nowadays, these venues are acting beyond the usual, providing an effective way of attracting visitors and travelers, as they offer a greater variety of services and products. Thus, a successful development of football stadiums depends, among others, significantly on the type of ownership and management policies. The objective of this paper aims to provide an in-depth insight of football stadiums' contribution to the local and urban tourism development, in areas with low tourism intensity and potentials, revealing the aspects that can upgrade them to points of higher tourist interest. This work focuses, mostly, on studying the effects of ownership on the development processes of a modern stadium, which is profiled as a venue providing various services and products, and especially, on the national football stadium located in the city of Patras in the Western Greece. The results of the research showed that the ownership of these stadiums affect their development as tourism products and destinations, as well as their financial management and organizational structure and policy.

Keywords Football stadiums' services · Tourism intensity · Tourism development · Stadiums' ownership · Management policies

JEL Classification L21 · L25 · L32 · L33 · L83 · Z21 · Z32 · Z38

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1 Introduction

It is an indisputable fact that popular tourist destinations face challenges of either over-visitability or stagnation in offering novel attractions to visitors (Brochado et al., 2021; Humphreys, 2019). The recent economic crisis has impacted various sectors of the football industry, compelling Europe's most prominent clubs to adopt novel business strategies and stadium management approaches (Ginesta, 2016). As a result, the evolving demands in sports, tourism, economy, and society have spurred a notable trend in developing new stadiums or upgrading existing ones (Lee et al., 2012; Paramio-Salcines et al., 2008).

The transformation of stadiums from single-purpose venues to multi-faceted facilities has been initiated through new stadium constructions or reconstructions of existing ones. This transition optimizes stadium utilization by offering hospitality packages and unique experiences to visitors (Ginesta, 2016), effectively establishing stadiums as branding platforms with the aim of enhancing annual profitability (Brochado et al., 2021; Lee et al., 2015). These developments are evident in major cities across China and North America, where significant investments are continually directed toward stadium modernization, ultimately generating revenues for these cities (Ramos et al., 2022).

Sports venue management has inevitably evolved, resulting in the design of more luxurious facilities, which in turn make them attractive points of interest for tourists. Additionally, strategic tourism partnerships have been incorporated to satisfy the need for leisure and align local fans with the event schedule (Vrondou, 2022, 2023). So, stadiums provide a diverse range of supplementary services alongside the main event, combining with various on-site activities such as museums, restaurants, cafes, and retail stores, all of which contribute to offering enjoyable leisure experiences (Brochado et al., 2021; Ginesta, 2016; Humphreys, 2019). Furthermore, stadiums include designated areas and facilities that can accommodate business meetings and private events (Lee et al., 2015). The prevailing strategy involves arranging diverse cultural and thematic events to attract various market segments, creating 'year-round' attractive tourist destinations based on existing local venues (Katsoni & Vrondou, 2016).

An important component of successful operation and use of marketing strategy of a venue depends on the adopted type of ownership (Fenich & Bordelon, 2008). Thus, the primary focus of this work is to examine points of interest in an urban tourist area characterized by low tourism activity and untapped potential. The goal is to identify the factors that could elevate these points of interest to attract greater tourist attention. The research aims to investigate the correlation between the beliefs and perspectives of football stadium managers and local stakeholders. Additionally, it seeks to explore how these views influence the usage of the stadium's facilities and services as a versatile entertainment venue. Furthermore, the study will assess how the ownership and management approach of a football stadium impact its capacity to utilize its facilities and services in a variety of ways.

The study examines the Pampeloponisiako Stadium, an Olympic facility managed by the Municipality of Patras in Greece. It explores how ownership and management philosophy impact the stadium's development as a multi-faceted venue. The research topic of this work is not thoroughly studied through literature and can serve as a reference for stakeholders seeking strategies to create stadiums with economic, social, and cultural significance for their cities.

The rest of the paper is organized as follows. The first section provides an overview of the research area, followed by the methodological framework of this research. The research results are then presented, as well as the corresponding conclusions.

2 Literature Review

Modern football stadiums offer a plethora of commercial opportunities to consumers, attracting not only local fans and supporters but also travelers from all over the world seeking unique tourism experiences (Edensor et al., 2021). Moreover, stadiums have acquired significant social importance as places of emotional and historical heritage, continuously gaining recognition and value within the heritage and tourist landscape, offering powerful tourism experiences (Brochado et al., 2021).

The importance of studying the various uses of a stadium is reflected in the research activity of recent years (Ginesta, 2016; Ginesta & Eugenio, 2014; Heere et al., 2019; Humphreys, 2019; Wang & Hsu, 2010), as well as the significance of international sporting events in improving the image of tourist destinations (Andersson et al., 2019). However, the extent to which satisfaction from visiting a stadium influences the development of surrounding areas as tourist destinations is not fully understood. Ramos et al., (2022), Ramshaw and Gammon (2010), Ramshaw et al. (2013), Brochado et al. (2021), and Edensor et al. (2021) have provided evidence demonstrating the significant influence of the visitor experience on both the team's image and branding, as well as the overall image of the destination. These studies underscore the importance of conducting additional research to delve deeper into the effects of the visitor experience on the destination's image. Ramos et al. (2022) and Edensor et al. (2021) argue that there is a lack of sufficient research on the significance of utilizing stadiums as multifunctional recreational sites. Furthermore, they emphasize the need to investigate sports facilities of smaller sizes and in less developed economies. Lee et al. (2015) emphasize the need for sports stadium managers to create sustainable, long-term plans to maximize infrastructure use beyond sports events. Understanding stadium ownership and management types is crucial for efficient planning, attracting events, audiences, and generating revenue for the stadium and host city; Fenich and Bordelon (2008) explored how ownership and management influence facility use, focusing on large-scale venues to boost urban tourism, and they found that the success of these facilities depends on specific management approaches, ownership type, and the city's competitiveness, highlighting the importance of future research to track changes in organizational practices and infrastructure ownership worldwide; according to them, the types of ownership in large-scale recreational

facilities are either private, held by companies or enterprises with their management resembling an economic business or by amateur football organizations, either public, held by government, non-profit organizations, and public companies. The types of management are also classified as private (as a profitable business firm), public (by local political authorities), and hybrid (a model with Board of Directors appointed by the Government). The above distinction of types of ownership and management in categories with specific characteristics helps to a great extent the understanding of big scale venues' operation modes. Similarly, Dong et al., (2020) explored the challenges the Chinese government encounters in managing sports facilities it owns, encompassing financial and organizational aspects.

Olympic stadiums form a distinct class of sports facilities found worldwide, specifically constructed to meet the rigorous demands of hosting the Olympic Games. According to Preuss and Plambeck (2020), an Olympic stadium transcends its role as a simple venue for the opening ceremony and games' events. Their study highlighted several developmental aspects of these properties. Besides hosting the Olympics, these stadiums also serve as venues for attracting future sporting and non-sporting events, act as catalysts for the development of the surrounding areas, showcase architectural masterpieces, hold significant symbolic, social, political, and national importance, generate revenue, and attract visitors from far and wide.

It becomes evident that there is a need for additional research on the intricate aspects of sports product and service consumption within football stadiums, which serve as versatile entertainment venues. This research should particularly focus on regions with limited tourist capacity and minimal influence of football and other major sporting events.

Examining the matters of stadium ownership and management is crucial in comprehending how their facilities and services are utilized. Additionally, it aids in understanding how these stadiums can be developed into multi-faceted facilities, that attract tourism and bring about economic benefits for both the stadium itself and the surrounding region (Dong et al., 2020; Edensor et al., 2021; Lee et al., 2012; Ramos et al., 2022).

3 Methodology

Initially, to carry out the research, primary data was gathered by examining the current legislation and the official website of the studied sports facility, the Pampeloponisiako Stadium. The main aim was to document the legal, ownership, and administrative aspects of the stadium. Specifically, detailed information was collected from the official website pertaining to the sports facility's capacity, available spaces, organized events, and the stadium regulation.

A total of eight comprehensive face-to-face semi-structured interviews were carried out with individuals who play a pivotal role in making decisions for the stadium activities. These interviewees have been actively involved in the region's sporting events for an extended period and hold key positions such as members

of Boards of Directors, committees, clubs, coaches, including the Chairman of the Management Committee and the Deputy Mayor of Culture and Sports. Furthermore, three additional semi-structured interviews were conducted with Patras-based journalists who frequently cover events at the stadium.

The data analysis was carried out by conducting interviews and then performing content analysis to interpret the meaning of the participants' responses. These responses were then categorized into thematic sections based on their content. The interviews were conducted anonymously to ensure confidentiality.

For capturing the perspectives of interviewees, a qualitative research design was deemed the most suitable approach (Ginesta, 2016; Lee et al., 2015; Morse, 1994; Patton, 2002). The selection of participants was purposeful, based on their role and expertise, following the criterion sampling method suggested by Creswell (1998) and purposeful selection by Maxwell (2005). This design choice was influenced by previous studies conducted in football stadiums in Europe and multi-sport venues in America, making the chosen plan realistic and feasible.

Since there were no comparable studies conducted in urban areas with low visitation, limited infrastructure, and unique features, it became imperative to utilize the same analytical methods in this research. This step was essential to achieve more comprehensive outcomes concerning the potential of football stadiums as multi-faceted tourist attractions.

The main research questions are the following:

1. How is the development of a multi-purpose stadium affected by the existing legislative framework?
2. How does the ownership of a stadium affect its development as a multi-purpose entertainment venue?
3. How does the ownership of a stadium affect its economic development?
4. How does the management of a stadium affect its economic development?
5. How does the management of a stadium affect the provision of a variety of services and products?
6. How does the management a stadium influence the partnerships with public and private bodies in the city?
7. What is the social importance of the stadium?

3.1 Case Study

Constructed in 1981 and later refurbished in 2004 to accommodate the Olympic Games, the Pampeloponisiako Stadium in Patras holds the distinction of being an Olympic facility, as stated in Law 3342 (2005) (Table 1). This stadium is under the ownership of the Hellenic Public Properties Company (HPPC) but is operated and managed by the Municipality of Patras. It has a seating capacity of 23,588, making it the largest sports facility in Western Greece (pampeloponisiako.gr, 2023). With its multifunctional design, it serves as a crucial sports center, significantly enhancing its importance in the region.

Table 1 Football stadiums that were used in the Olympic Games of Athens 2004 and have been characterized as Olympic facilities (stadia.gr, 2023)

Stadiums	Capacity	Owner	Manager
Pampeloponisiako	23.588	HPPC	Municipality
OAKA	68.079	Greek State	Greek State
Pagritio	26.000	HPPC	Municipality
Panthesaliko	22.700	HPPC	Municipality
Kaftanzoglio	27.770	Greek State	Greek State
Goudi sports complex	840	HPPC	Municipality

Based on information from the official website, the stadium includes a football field with natural turf and is surrounded by an eight-track athletics carpet. In addition to this, there are two auxiliary football fields, various underground areas, and multi-purpose rooms located on the first floor. The stadium is equipped with several amenities, such as gyms, training, changing, and auxiliary rooms. For convenience, there is external parking available, as well as an underground busway encircling the perimeter of the stadium on the basement floor. Moreover, the venue houses administration offices, a canteen, multimedia equipment, Wi-Fi, and TV facilities. It also has a control room, a dispensary, and three large matrix screens. Furthermore, there are stocks and a call center on-site. These facilities have been designed to accommodate a diverse range of activities, including sports, cultural events, and various other functions (see Table 2). However, these services cannot be evaluated directly as the official website does not support online reviews.

In the facility, approximately 80 non-professional sports and cultural clubs are accommodated, availing complimentary access to the venue areas and rooms. Moreover, individuals desiring to engage in physical activities are granted free usage of

Table 2 Services and utilities in Pampeloponisiako Stadium

Sport events	Cultural events	Social events	Business events
Tournaments	Concerts	Seasonal events of unions	Contests
Championships	Shows	Information days	Seminars
Training center	Competitions, e.g., stratego and robotics	Collection of humanity aid	General unions' meetings and elections
School championships and tournaments	School events	Control center of virus COVID19	Council meetings
Camps	Group dance events	Tutoring events	Meetings
Hellenic Football Federation coaching schools	Music, political festivals and events	Actions for people with disabilities	Political speeches
Examination center	Awards		Press conferences
	Exhibitions		Exhibitions

the sports facilities upon receiving an entry card. However, it is possible to rent the stadium's premises to private individuals and profit-making organizations for a fee.

The various uses of the stadium align with the European trend of managing top football stadiums, exemplified by facilities like the Tottenham Hotspur stadium in London. The stadium's official website offers detailed information about the events and services available throughout the year, serving as a valuable paradigm for any major facility (tottenhamhotspur.com, 2023).

The Pampeloponisiako Stadium, Pagritio Stadium, Panthessaliko Stadium, and Goudi Sports Complex are owned by the HPPC and are managed by the respective municipalities of the cities. Among these venues, Pampeloponisiako Stadium stands out due to its distinctive management approach compared to the other Olympic Venues. Unlike the others, which are managed by anonymous companies, managers, and special advisors under the Municipalities, Pampeloponisiako Stadium operates differently.

At Pagritio and Panthessaliko Stadiums, the entities responsible for their management rent out all areas and usage rights to citizens, clubs, and corporations with the aim of generating profits from their activities. This management structure is governed by Decision N. 355 (2021) of the Volos Administrative Council and Law 13172 (2009), respectively. On the other hand, Goudi's Stadium has been more recently utilized to address certain sporting needs of the local community, with the capacity of the stadium reaching about 850 seats, so it cannot be compared with the rest of the Olympic facilities.

The utilization of a stadium for commercial purposes is determined by the provisions outlined in Law 3342 (2005) concerning Olympic facilities. This Law imposes a restrictive limit of 10% on the cumulative building factor for commercial ventures. As for matters related to standards, safety, licensing, etc., Sport Law 2725 (1999) is applied, which has undergone several amendments over time. *Specifically, Law 4809 (2021) enables football companies (S.A.) to independently determine and finance the construction, maintenance, and reconstruction of their sports facilities. However, this law does not apply to Olympic properties.*

Similarly, the current regulations of the Hellenic Football Federation (2019) and FIFA-UEFA (2018) are applicable to sports facilities, and authorities must comply with them to upgrade a facility.

On November 13, 2008, a Programmatic Agreement was signed among the Ministry of Culture, the Region of Western Greece, the Municipality of Patras, and the HPPC. This agreement delineates the financial and operational aspects pertaining to the Pampeloponisiako Stadium facilities. According to the agreement, the Municipality of Patras is responsible for self-financing the stadium, while receiving annual financial support from the Ministry of Culture. Moreover, the HPPC is committed to providing financial assistance in alignment with the provisions outlined in the Act. The official website of the stadium provides the established regulations for its operation (Agreement N. 13/11/2008, 2008).

3.2 *Limitations*

There is an imperative need to establish appealing urban destinations to alleviate congestion in existing popular locations and support strategically and economically weaker destinations in the tourist market.

Nevertheless, certain factors existing in Greece, such as short-range events, championships, and various challenges at financial, organizational, ownership, and cultural levels have led to a prevailing trend where stadium visits primarily revolve around watching matches, mainly driven by local football fans and team supporters. To address these issues, an investigation into the visitor profile at football stadiums in Greece is required, alongside a comprehensive understanding of the Greek reality. The ultimate goal is to propose solutions that will enable the country to gain recognition as a tourist destination with various points of interest.

While it is important to note that the limited number of respondents may not fully represent the views of all stakeholders associated with or involved in the management of Pampepolonisiako Stadium of Patras, the survey does provide significant insights into how a stadium managed by a public entity functions. This is especially relevant since the majority of football stadiums in Greece are typically managed by private entities, predominantly football clubs.

4 Findings

The examination of the answers provided by the research participants produced the subsequent outcomes.

Facilities: The Pampepolonisiako Stadium of Patras is equipped with top-notch sports facilities primarily utilized by the city's amateur clubs, athletes, and sports enthusiasts. This accessibility is made possible through the implementation of the 'Social Sports Policy' by the City's Authorities, aiming to foster the development of the triptych 'Sports-Culture-Society'. As part of this policy, amateur sports organizations are not allowed to impose a monthly financial contribution on their members as per the stadium's regulations. This has led to a high influx of the public, resulting in the need for improvements in the stadium's infrastructure.

The stadium also includes unique facilities, such as underground access via a busway connecting different areas of the stadium, as well as over 100 halls accommodating the city's clubs, gyms, changing rooms, and auxiliary fields. Besides the existence of a canteen, there are no commercial premises within the stadium. However, there is a consensus that the infrastructure needs upgrading to comply with international regulations in order to attract major events. Participants in discussions about the stadium mentioned that the current facilities have reached the end of their useful life and emphasized the necessity for evolution, considering the stadium as a living organism.

Admittedly, the municipal authorities have made significant investments in the stadium and have devoted time and effort to its upgrading. They have regained 'full management responsibility' of the facility from private entities, unlike other Public Olympic Properties that were abandoned and destroyed. Also, there is still space for development, with the possibility of expanding the number of seats and with a corresponding increase in the multi-usable space under the stands.

Services/Events: The survey participants have confirmed the variety of sports, cultural, and other types of events held in the stadium facilities, tailored to meet the requirements of applicants. The points of high interest in meeting the needs of broadcasters, audience, athletes, and officials are mainly in the sectors of trade, with the absence of commercial stores, cafes, restaurants, and boutiques.

Regarding the technological aspects, recent digital upgrades were carried out, through a grant from the National Strategic Reference Framework (NSRF), with the installation of three digital matrix screens around the stadium, while another digital upgrade, also supported by NSRF funding, has been implemented. Also, free internet access is available in all areas of the facility, while a modern security system with cameras is in operation.

In terms of sustainability, an energy upgrade for the stadium was approved through NSRF incorporating the installation of solar water heaters and led lamps throughout the infrastructure. Moreover, there is a pending request for the installation of photovoltaic systems. Electricity consumption has been greatly reduced due to the replacement of digital screens with new higher energy-class screens.

Access: The participants unanimously praised the stadium's strategic location, easily accessible via the National Road Athens-Patras-Pyrgos, the Perimetric Road of Patras, and it is located in a central point within the city of Patras. However, a major drawback is the lack of a modern airport in the city. The only airport in the area, located in Araxos a few kilometers away from the city, serves only a small number of flights and air companies. Consequently, attracting large sporting delegations, especially for events like football, becomes challenging, as the UEFA-FIFA specifications for organizing major European-international matches require an international airport with the capacity to handle up to 80 charter flights per day, in addition to regular flights. Finally, regarding accessibility for people with disabilities and handicapped persons, the facility meets the specifications of an Olympic facility. It offers numerous infrastructures, such as two spacious elevators, two carts for transporting people around the stadium, an ambulance ramp through the underground busway, and parking facilities near the elevators.

Social Importance. The stadium represents a 'historical legacy' stemming from the 2004 Olympics and the locals have embraced the stadium as a cherished symbol, as a 'jewel'.

Revenue/Funding. A. There are limited sources of income from the exploitation of stadium facilities, with revenues from organizing concerts being noteworthy due to the particularly low fees charged by the stadium management as part of its pro-social policy. However, commercial activities, such as cafes and retail outlets, are currently

absent. Any income generated is paid to the Municipal Central Fund, which then allocates the money in whatever direction it deems necessary, including the stadium.

B. The most important source of funding is from public bodies. According to the contract signed after the 2004 Olympic Games between the owner, a State-owned company, and the Municipality of Patras, the Municipality undertook the management and utilizing of the stadium, while the State committed to providing annual funding of a fixed amount to cover operational expenses, modernization efforts, and maintenance of the stadium. However, the State has not fulfilled its financial obligations to the Municipality, leaving the latter with the task of financially supporting the facility using its own resources. Recently, funding was secured from an NSRF fund, which initiated the first phase of the stadium's facilities' digital upgrade. Additionally, the stadium generates income from venue rentals for events, mainly concerts. However, these earnings are insufficient to meet the considerable requirements of a facility of this magnitude.

The above evidence highlights the difficulties in funding, as agreed upon by all respondents, which hinder the development and upgrading of the stadium. Funding from the Ministry of Culture through the Region of Western Greece often encounters difficulties and delays due to political influences, bureaucratic approval processes, and disbursement policies implemented by the region toward sports. However, the needs of the stadium are constantly increasing with time and at the same time changes in legislation necessitating changes in the infrastructure to be aligned with international quality standards.

C. There are no sponsorship partnerships with private companies, even though such arrangements are allowed under the Operating Rules. As a result, there is no income from such sources. While no participant denied the possibility of sponsorship, the majority of respondents referred to the 'contrary philosophy', 'exclusion of sponsors', and 'opposition to private initiatives' of the stadium's managing authority. According to the representatives of the Municipality, any advertising that aims to offend health, society, and moral values is excluded. A stumbling block to this effort is, also, the lack of qualified stadium staff who can comprehensively deal with attracting sponsors. The small number of permanent staff is engaged in the general day-to-day tasks of running the stadium, and no organizational chart of any kind is maintained.

Cooperation with Institutions. The stadium's management committee cooperates closely, as mentioned above, with the Municipality of Patras, which supervises it. The committee's members are representatives of various party factions within the Municipality of Patras. On the other hand, relations with private entities in the city do not yield the desired results. For instance, cooperation and consultation with hotels in the area to develop a common strategy for attracting large-scale events to the stadium and, consequently, to the city have been lacking. The survey respondents primarily emphasized the 'need for extroversion' and the 'need for modernization'.

5 Conclusion

The legislation specified to the Olympic facilities, combined with the existence of numerous laws that are constantly being amended, as well as international and European sports regulations, constitute obstacles to the development of the stadium as a multi-purpose venue. These restrictions affect the ability to maximize the facilities utilization and hinder necessary interventions and renovations, consequently limiting its ability to attract large-scale events.

The ownership model of a public entity significantly influences the stadium's development in terms of infrastructure and economic aspects. Despite the stadium having high-quality infrastructure, which was originally constructed and effectively utilized during the 2004 Olympic Games, there have been no opportunities for renovation and financial backing from the State. This situation persists, despite the existence of a relevant contract and, consequently, a responsibility for maintenance.

The concession of utilization and management to a municipal entity (Municipality of Patras) was an advantageous move for the interests of both the stadium and the city, considering that the vast majority of Olympic properties in the country were abandoned and dismantled.

Every action related to the organizational and financial support of the stadium is completed through time-consuming procedures, such as tenders for staff recruitment, cooperation with sponsors, undertaking renovation projects, and securing funding through the region and the NSRF.

The underlying principle governing stadium management significantly influences the utilization of its amenities, the majority of which are provided at no cost to the city's clubs for permanent use, alongside the sports infrastructure. The emphasis lies in fostering amateur sports for the betterment of society, reciprocating with sports and cultural opportunities, rather than solely prioritizing the stadium's facilities for commercial gains.

The presence of legislation dedicated to the Olympic venues, alongside various evolving laws and international and European sports regulations, poses a significant challenge to the advancement of the stadium as a multi-purpose venue a multi-purpose venue. These regulations hinder its capacity to fully utilize all available facilities effectively and impede the implementation of necessary interventions and renovations by the responsible public authorities. As a result, the stadium faces limitations in attracting large-scale events.

The presence of supervision and the requirement for approval from the Municipality of Patras have significant implications for the functioning of the stadium. On the one hand, this oversight plays a constructive role by establishing boundaries and ensuring accountability in preventing any potential misconduct by the stadium's administrative authority. Conversely, it also imposes constraints and potentially excessive control by the Municipal Authority of the city. Consequently, the stadium's management committee is ultimately formally responsible for dealing with the overall management.

It also significantly affects the economic development of the stadium, primarily resulting in diminished revenue owing to restricted utilization of its facilities. The financial support for the stadium mainly relies on the Central Fund of the Municipality of Patras, the Region of Western Greece, and European Funds.

An exemption concerning event revenue lies in the case of music concerts held in allocated venues. These concerts yield substantial financial gains for the Municipality. However, it is important to note that the proceeds from these concerts are directed to the Municipality's Single Fund and do not fall under the autonomous management of the Stadium's Managing Authority.

Any kind of sponsorship cooperation with private entities is absent, as there is a lack of interest from sponsors and a lack of staff specialized in marketing.

City institutions' interactions are similarly prone to political interventions, particularly when it comes to institutions that hold opposing views to the political philosophy of the Municipality of Patras. At the same time, collaboration with private tourism operators remains weak.

The stadium is of great importance to the surrounding area, as it holds value as both an architectural achievement and a 'historical legacy' of the 2004 Olympic Games. The reconstruction and subsequent development in the vicinity have resulted in its transformation into a vital infrastructure that actively contributes to the continuous growth of the city. The incorporation and functioning of additional auxiliary stadiums and freely accessible recreational facilities for the residents of Patras have further solidified its integral role in the city's ongoing progress and development.

In conclusion, conducting a comparative study between publicly owned facilities that apply different styles and management approaches to sports infrastructure, as well research between infrastructure owned and managed by a public and private entities, would be enlightening. Such a study would aim to document the development of a stadium and identify the most appropriate management models, allowing the implementation of effective marketing and management strategies.

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Sports and Tourism Connected to the Environment: A Critical Review



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Abstract The present study focuses on examining the linkage between sport and tourism and the way that environmental concerns contributed to this interlinkage. The aim of the study is to dive deeper into the basis of the connection and understand the circumstances that supported this connection with a critical eye. At the first glance, sports and tourism-related activities share no common environmental principles. Surprisingly, this epidemic approach will soon withdraw to the notion that their union is indisputable, especially when it comes to the practical setting of sport competition, sports events and venues. The examination employed critical review and content analysis of the available sustainability-related paradigms, as well as sport and tourism theories and typologies as they developed over the past 30 years. The present review underlines our common rising consciousness toward environmental protection which was also early adopted by the sport and tourism scholars and operators. Despite this initial instinctive appreciation of the intrinsic green character of sport and tourism, proof is needed to build on the equivalent green operation, policy and academic theory. The theory maturity signaled that further definitional and typological analysis and clarification are needed to differentiate among the diverse sport and tourism forms and uniquely categorize the greenest parts of this sport and tourism function. The outcome of this study highlights the roots of this amalgamation, in the scope of the natural environment contribution, hopefully contributing to a more sustainable sports tourism industry and a robust sport and tourism operation.

Keywords Sport tourism · Environment · Sport events · Green movement · Sustainability

JEL Classifications Z32 · Q56

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1 Introduction

From the beginning of human civilization, there were shreds of evidence that sport and tourism were connected, which was becoming more apparent over centuries. The first evidence of the union of sport and tourism was found in ancient Greece. Back then, people were willing to travel to attend the Olympic Games, not only as participants but also as spectators (García Romero, 2013). Motivation to travel for sports activities emerged in 776 BC, but it was not until the 80s when the emphasis of the connection between sports and tourism earned its place in the academic field (Glyptis, 1982), while before that time sport and tourism were considered as two separate activities (Glyptis, 1991). However, it remains a complex topic among academics, which cannot agree to one single definition (Vrontou, 2017). This connection is considered as a “synergy,” which encloses the notions of physical activity and experience of space (Gibson, 1998). Undoubtedly, scholarly observations and descriptions are essential to lifting forward and discussing the concept of environmental connection and sports tourism. The present study aspires to highlight the environmental elements which unite sport and tourism. This broader review can offer insights into the history of the green movement in general and into the green thinking of sports and tourism especially, and how this connection affects the sport tourism industry today.

2 Theoretical Considerations

2.1 *The “Green” Movement*

It was in the 80s when political movements with ecological beliefs used the term “green” to define themselves. These political parties, which had been favored by the collapse of communism and socialism, and with the promotion of their ecological orientation, became popular with the public (Harrison & Boyd, 2018). These movements consisted of group activities that turned their attention to the Earth and human relationship (Landmann, 1999). In general, the 90s signaled a massive outburst of environmental protests around the world (Rootes, 2008) and a noticeable growth of the ecological activism movement (Seel et al., 2000). As an example, “protests took place at ecological sites where road building was planned” as Pickard (2020) noticed, while environmental activists subverted Canada’s plans to renovate the Sky Dome and bid for the Olympic Games, as Kidd (1992) depicted. As a result, during the 90s, new theories such as green management emerged (Lindsey, 1990), and by the late 90s, the need for the adoption of environmental policies and actions, adorned with the popular terms of “sustainability,” or “sustainable development” were infiltrated dynamically in all fields, despite the conflicts and complexity for the definitions of these terms (Hempel, 2009). Meanwhile, the consuming habits started to change, and the environmentally friendly attitude began to appeal to the public (Fisher, 1990).

This new reality started to change as the time went by. It is true that ideological conflicts are very often a common problem among all types of movements, political, social, or others. The green movement was not an exception back then, and it is not an exception in our days (Harrison & Boyd, 2018). Those peaceful and ideological actions changed as time went by. The pure nature of activism had turned into the institutionalization of mass-scale environmental concerns with the explosion of environmental organizations since the mid-1990s, and as Rootes (2003a, 2003b) stated: “lost the character of a social movement.” Admittedly, it is a common ground among environmentalists, and other professionals in environmental studies, that even now there is a lack of synergies and management strategies for the achievement of the environmental goals; thus, the stakeholders need to get involved deeper to address the issue (Ferre, 2017). Nonetheless, the tourism sector could not be untouched by this 90 s “green fever,” same as the sports development industry. As a matter of fact, and because of their nature, these sectors were affected more than others. Over and above that, and even if the green movements lost their previous dynamic, their legacy is kept strong. Nowadays, the green movement’s heritage, “green thinking” has been incorporated in all national, and local policies, as well as industries, worldwide (Bortree & Seltzer, 2009).

In recent years, environmental issues, with an emphasis on nature protection, have been the focus of public and academic attention (Chen et al., 2018), with the tourism and sports industry not to be an exception. In fact, the terms green and sustainable are today a high demand factor for both sectors. Regarding its natural characteristics, tourism shares the same interlinkage connection, and dependence with the environmental elements, as sports (Huang et al., 2019; Williams & Ponsford, 2009). Indeed, sports and tourism are considered in the literature, as leisure forms, that encourage local entities positively, and at the same time act as a supervisory mechanism (Vrondou et al., 2019). This relationship means that both could be harmful to nature, without proper management and environmental strategies, impacting negatively both natural ecosystems, tourists, and athletes. In light of the above, it is vital to analyze the sectors of sports and tourism separately and collectively, in order to detect their ecological union characteristics.

3 Methodology

The method of critical review remains crucial to obtain robust knowledge and secure results, especially in research areas where in-depth analysis is needed. Analyzing a wide spectrum of theoretical work linked with sustainability and sport tourism becomes a demanding task especially when the research area is underdeveloped. Flick (2014) emphasizes that qualitative data analysis aim is to reach “core elements or expanding small pieces of data by adding extensive interpretations.” This premature volume of work then needs qualitative factoring to be involved in order to identify thematic categories and secure credibility of assumptions. The final aim is to

reach concrete assumptions and a guiding paradigm that could lead to further future research in the environmental side of the sport and tourism operation and policies.

4 Results

4.1 *The Green Awakening in Sport and Tourism*

In respect of sports, the first thought for “green” games according to Chappelet (2008) “took root in 1994 in the Olympic movement in Norway,” while the same year the environment was appended as the third aspect of Olympism (Chappelet, 2008). Two years before that, in 1992, a milestone for sports and the environment occurred. The “Earth Pledge,” a written contract with the goal of urban regeneration, involving environmental measures, was signed at the Barcelona Olympic Games. A few years later, in 1995, the first sports environmental committee was set up, IOC’s Commission on Sport and the Environment, and applied four years later, in 1999. The goal of the commission was the promotion of the environmental necessities for candidate cities, and their natural effects (Cantelon & Letters, 2000). The year 1999 was a milestone that embraced the connection between sports and the environment when the IOC introduced Agenda 21, a written guideline about environmental management policies in the Olympic Games (Paquette et al., 2011). In more detail, sports are inseparably linked to nature, especially those that take place outdoors, and all of them, outdoor or indoor, contribute to forms of environmental damage (Thibault, 2009). The appellation “green” has appeared in most of the sectors of the sports industry, but with different meanings and coping techniques, with the common element of collaboration against the environmental issues of sports. Indeed, the denomination “green” is associated with environmental applications and services, with an emphasis on sports events (Choi, 2016). By hosting these events, scholars and organizers take into account not only the events’ operations themselves (e.g., traveling), but also sports facilities in order to measure and then manage their total environmental impact, which in most cases is negative (McCullough et al., 2019).

In parallel, in the tourism development industry, since 1983, the World Tourism Organization (WTO) has recognized the need for environmental sustainability (WTO, 1983), but it was not till 1993 when it suggested the notion of Sustainable Tourism. Moreover, according to Chengcai et al. (2017), the first time “sustainable tourism” was introduced as a term was “at the Globe ‘90 international conference in Vancouver, Canada,” in 1990. Even if tourism was not covered as a sector in Our Common Future (World Commission on Environment & Development, 1987), this changed in the Earth Summit in 1992 when the need for environmental performance in tourism was recognized (Pigram & Wahab, 1997). In addition in 1995, the first World Conference on Sustainable Tourism took place in Spain, and the Chapter of Sustainable Tourism was introduced (Hall, 2011). In the same manner, the First International Conference on Climate Change and Tourism was held in 2003, in Tunisia,

when the linkage between climate change and tourism was mentioned, resulting in GHG emissions' abatement commitment as a solution to climate change mitigation (UNWTO, 2003).

However, the concept of green tourism is complex, because it is covered in terms of rural tourism, sustainable tourism, responsible tourism, and ecotourism among others in the academic literature. The main concept of these terms for some scholars involves the reduction of the negative environmental effects of tourism activities, and the ethical equitable distribution among tourists and locals (Pan et al., 2018), while for others includes traveling in environmentally sensitive ecosystems, driven mainly for educational motivations (Lee et al., 2016). Continuously, for Wight (1994), "green tourism" is connected to holidays in natural destinations and exotic locations, for others is synonymous with environmentally harmless tourism operations and services (Font & Tribe, 2001), and the conservation of nature (Ghosh et al., 2003). On a different point, which cannot be overlooked, Bramwell (1990) pointed out the economic and cultural benefits of green tourism, but other scholars are focused on their negative environmental impacts, believing that these are more "visible" and more influential for humans (Huang et al., 2019).

In the combining spectrum of sport and tourism, therefore sports tourism, the 2000 Sydney Olympic Games was the starting point of the incorporation of environmental operations in a mega sports event. The Games highlighted their environmental practices with the support of non-governmental organizations (NGOs) to achieve their goal, promoting the need for further allies to this try (Weiler & Mohan, 2010). Besides that, the term "green tourism" appeared in Europe in 1997, and it related to the concept of "rural tourism" (Yamazaki et al., 1997), while in the UK, in the sports industry, the word "sustainable" firstly appeared in the 00s (Lindsey, 2008), meaning the sustainable actions of both environment, locals, and tourists (Azam & Sarker, 2011). In addition, a key milestone was the first alliance between sport and tourism was signed by the IOC and WTO at the expiration of 1999, in Lausanne (UNWTO, 2001), impacting "new tourism developments" and creating "new destinations," according to Vrondou et al. (2019). The connection between sports and tourism underlines the fact that sports by their nature, the same as tourism development, are a "source of environmental stress," mainly because of the high demand for new constructions, or re-constructions (Pearce, 1992). Besides that, even this synergy combines some important points to consider. Explaining the above statement, the most environmental sensitivity is present in active sport tourism, and their subcategory, adventure tourism, which takes place in the natural environment and hard-to-reach natural spaces. These sports activities are highly sensitive, and at the same time potentially harmful to nature, exemplifying that outdoor sports are vastly exposed to pollutants, affecting the health of the participants (Biglari et al., 2017). Thus, their planning and management are a crucial part of their processes (Pawlikowska-Piechotka, 2016; Silva et al., 2021), and from the previous years, something that continues today, there has been a high demand for green, or otherwise "eco-friendly" sports in the tourism sector, a motivation that keeps increasing (Singh et al., 2016).

4.2 *Green Consciousness Affecting Sports and Tourism Operations*

Sports and tourism activities indeed require an extensive amount of natural resources usage during the construction facilities process, but also in the sports events sector, causing environmental damage in the ecosystems (Hognestad et al., 2022; Jeong et al., 2019). Considering this, according to Vrontou (2018), sports events attract a great deal of attention from researchers in the fields of tourism, sports, and environmental protection, and this attention is an important motivation for organizers to take action. Over and above that, the healthy relationship between sports tourism and nature is a prerequisite for the development of the industry. Sports tourism and nature are attached and have a dual character. In fact, sports tourism development is a positive factor for tourism demand, but the more it increases, the negative effects on the environment also increase, decreasing the quality of tourism products (Shen & Kou, 2014). Moreover, sports events have the power to connect the local heritage, with the uniqueness of each natural environment, supporting, and training the residents (Lorde et al., 2011). Decades ago Long (1991) observed that tourists started to pay attention to “environmental issues,” while later studies showed the salient role of the perceived environmental impact of sports events, not only for tourists but also for locals (Stylidis et al., 2014). Additionally, although scholars have agreed on the lack of a sports tourism policy (De Knop, 1990), today there have been calls to raise the environmental consciousness among locals, tourists, businesses, and marketing experts (Perić et al., 2019). In the negative, tourism development requires a demanding amount of natural resources, causing environmental degradation in the local space, but the attempts to mitigate these negative impacts cannot be overlooked (Furqan et al., 2010).

Similarly, a great example of restorative sport tourism occurred as an impact of the Beijing Olympic Games. Before, during, and after the Games, an environmental campaign was promoted with the aim to educate the public into environmentally friendly consumption options. Meanwhile, according to Yang and Xu (2014), “the area of the nature reserve reached 8.2% of the total land area in Beijing,” and the forest green rate increased significantly. In the 2020 Tokyo Olympic Games, the Olympic medals were manufactured with recycled metals, an action which boosted the positive public reactions to the environmental practices of the Games (Rowberg & Rincker, 2019).

Evidence of environmental consciousness is also implied in sports federations policies, which nowadays have integrated the environment into their strategic planning, emphasizing their green operations. Paradoxically, even motorsports have now adapted to the new environmental challenges. Exemplifying this, Formula E attempts to improve air quality and reduce carbon footprint through recycling, aiming for zero emissions (Sturm, 2018). In a different type of sport, FIFA launched the Green Goal, an environmental project for the FIFA World Cup in 2006, with objectives such as the responsible use of water, the avoidance and environmentally sound recycling of waste, the environmentally compatible production and efficient use of energy

and the efficient and environmentally beneficial development of mobility. Regarding the sports stadiums, the majority of facilities have applied environmental systems, focusing on electricity saving, and recycling. For example, the Lincoln Financial Field made the beginning of environmental training for fans (Trendafilova et al., 2014), while in the Mercedes Benz Stadium, the roof was transfigured to adapt to environmental changes (Gnedina et al., 2019). On the contrary perspective, other scholars observed environmental benefits when a new sports facility is built on “devastated land,” indicating this action is a beneficial strategy (Prayag et al., 2013).

4.3 Sport Tourism Based on Environmental Quality

The observations of the theories of green sport and green tourism proved that the most profound common characteristic of these terms is their close interdependence with the environment. For Bale (2001), sports tourism consumers’ experiences tend to the degradation of the local ecosystem, while the early observations of Priester (1989) advocated the dual character of sport tourism as both “victim and aggressor of environmental impact.” Continuously, nature and sports are essential aspects of tourism development (Hall & Page, 2004), and as tourism products, is crucial to be preserved, if not the product will lose its quality and attractiveness (Bartis & Tofile, 2021). Tourism activities, therefore, also concern sports tourism, highly affecting the ecosystems, causing damage, and degradation of the natural environment (Azam & Sarker, 2011). Because of the complex nature of sports tourism, the environmental politics are, as an example, equally complex. This is the reason why the collaboration between public and private organizations is the key link of this attempt (Ratten, 2020).

Regarding other aspects of the tourism industry, the hospitality sector must also apply environmental policies. All sports tourists, active or passive, need proper accommodation with environmental standards. A study in 50 central hotels in Athens, Greece, located the issue of lack of environmental consciousness and efficient management, highlighting the need for proper environmental applications in Athenian hotels (Samartzi, 2023). It is well known that the hospitality sector and therefore tourism development have been accused of decreasing natural space “attractiveness,” especially in more environmentally sensitive destinations, and as justification economic benefits are used (Lee et al., 2016). On another spectrum, the adoption of eco-friendly policies is crucial for businesses and governments, who are gaining economic benefits through green marketing (Yfantidou et al., 2017). Meanwhile, the organization of sports events, especially in locations surrounded by elements such as open spaces and natural environments, generates vast environmental pollution issues such as the commodious amount of natural resources used, before, after, and during the event, which also affects the tourist’s experience and destination image, negatively (Kiani et al., 2019).

Despite the prominent obstacles, tourism operators are now aware of the need to shift to more green strategies, as their knowledge, same as the tourists’ ecological motivations, is growing rapidly (Yfantidou et al., 2017), especially those of the

younger generation (Palazzo et al., 2022). Likewise, in the sports field, the IOC has taken a pioneering role as the main administrator of environmental actions in sports, adopting measures and spreading environmental knowledge through training (McCullough et al., 2015). Some scholars pointed out the lack of policies and protection mechanisms (Vrontou et al., 2019; Ware et al., 2017), while others agreed on the lack of clear boundaries and agreements in the areas of resources, competition, management, and strategies (Cury et al., 2022). They highlight the need for regulations for environmental actions, not only by the governments but also by entrepreneurs (González-Serrano et al., 2020). On the contrary, and with a more critical attitude, some scholars agree that the outcome of the Olympic Games's environmental actions and practical policies are below expectations (Geeraert & Gauthier, 2017). Supporting that, it is a fact that even the IOC, one of the biggest green sport tourism advocates, in 2018 reported an annual carbon footprint of 60,630 tons, which is evidence of the high environmental risks, especially in mega sports events (IOC, 2021).

In a nutshell, an efficient plan combined with the application of environmental policies in the local community is also a key factor in achieving an eco-friendly solution, especially in sports events (Chersulich Tomino et al., 2020). Also, local authorities need to take action at the business level and areas, and to coordinate with the national environmental policies, while promoting environmental responsibility to the public with an efficient marketing plan, and using innovative tools (Morfolaki et al., 2023). These innovative tools do not only fall into the category of technological measures and techniques but also into new marketing strategies, which have the power to educate and promote the environmental consciousness of the public. "Green thinking" could be promoted to citizens through popular new media such as the Internet and television and boost the idea of the need for environmental protection and regeneration, in the worldwide society (Meng, 2021), shifting the anthropocentric dimension of attention to the urgency of protecting the natural ecosystems (Jamison, 2003).

5 Concluding Remarks

According to the previous theories and considerations, in this study, five main links between sport and tourism correlated to environmental elements. First, both sports and tourism are highly contributing to environmental degradation, because of their demand for new spaces, or rebuilding of existing ones, in order to support sports tourists, both participants and spectators (e.g., sports facilities, hotels and roads). Simultaneously, both sectors put enormous stress on local land use, leading to water scarcity, environmental pollution, natural habitat loss, and putting more pressure on endangered species. This fact is very important, especially since a healthy natural environment is essential for their growth, which is also a paradox. Continuously, these consequences may positively affect the economy of the local communities, but at the same time, they decrease the tourist product, and here lies the paradox reported

previously. Moreover, the collaboration of both industries is necessary, because of their interlinkage and dual character, in relation to the natural ecosystems.

Moreover, this study brought to light the potential ongoing actions that have the specifications to enhance the relationship between sport and tourism via environment, which are the need for applied environmental management, and the sense of green marketing, which is currently growing. Another tool for these actions is the power of green marketing, which could be used as a catalyst for the attractiveness of environmental behaviors among sports tourists, who are also clients of the sports tourism industry. More specifically about green marketing, it is crucial to identify the barrier of greenwashing, which was first introduced in the hotel industry according to Pearson (2010), and it is freely defined as misleading information to the public about the green benefits, or the lack of the harmful effects, of a product or service.

Practically, the present analysis suggests that the collaboration between governments, international and national sport federations, venue operators, sport clubs, sport operators, local communities, individuals, and tourism businesses is needed in order to produce and apply effective environmental policies and guidelines.

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Classical Versus Wellness Thermalism: The Case of Portuguese Thermal Establishments Before and After the COVID-19 Pandemic



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Abstract Thermal/mineral springs are one of the fastest-growing subcategories of wellness tourism. Indeed, it is an activity that has steadily increased in all of Europe's developed economies over the last few decades. The pandemic has raised awareness of the importance of healthy lifestyles and has subsequently led to a surge in consumption of experiences and travel, somehow motivated by wellness. This study analyses the evolution of thermal users' alternation between wellness and classical thermalism in Portugal. The objective is achieved by applying exploratory and cluster data analysis to a Portuguese administrative database containing the number of user registers and revenues generated from 2012 to 2022. During this period, the wellness registers increased in most thermal establishments compared to the classic records, even if service diversification may be found in most thermal establishments. Still, the financial value added by wellness consumers does not seem to follow the previously observed shift. The establishments with more classical registers are still the ones that are able to generate the highest income per person.

Keywords Wellness · Thermal establishment · Wellness thermalism · Classic thermalism · Wellness tourism · Portugal

JEL Classification I10 · I30 · Z30

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1 Introduction

In the twenty-first century, functional and chronic diseases derived from the rhythm and stress of everyday life are increasingly common. Depression and problems related to stress and anxiety are becoming increasingly recurrent (Moreno-González et al., 2020) and are considered by the World Health Organization (WHO) to be one of the priority diseases covered by the Mental Health Gaps Action Programme (World Health Organization, 2023).

As early as 1959, when the concept of well-being was not yet commonly known and recognised, Halbert Dunn observed that choosing a less healthy lifestyle does not only cause illness, it can also bring other problems that reduce our quality of life. Well-being is not just about the absence of disease but about the optimal level of health (Dunn, 1959; Myers et al., 2000). Ardell (1985), another foremost pioneer of the well-being movement, emphasises that achieving such a level requires a continuum of decisions. Physical health care, beauty care, food care, intellectual development, and relaxation, among others, can help achieve well-being (Mueller & Kaufmann, 2001). According to the Global Wellness Institute, the Wellness Economy has grown effectively. It implies that society is increasingly emphasising the promotion of its well-being. In 2020, the Wellness Economy generated about USD 4.4 trillion, an increase of 19% since 2015 (Yeung & Johnston, 2018, 2022). According to these authors, wellness tourism only accounts for approximately 10% of the Wellness Economy. However, concerning the tourism sector, wellness tourism is called by Smith and Puczkó (2008) the “gold segment” due to its highest growth rates.

Gustavo (2010, p. 129) argued that “health tourism has assumed the brand image of the original and classic “thermalism”, encompassing an endless variety of services that have health and leisure in common and where water, due to its natural relationship with the essence of the human being, remains one of the main elements, albeit used in different ways, with different objectives and alongside new techniques”. Thermalism is the second subcategory of the Wellness Economy, with the highest projected growth rate until 2025, indicating that the sector is gaining popularity and relevance in tourism and health (Yeung & Johnston, 2021). According to Kitchen’s (n.d.) projection, thermal tourism is expected to be one of the biggest trends by 2023. One factor that may have led to this growth may be related to the fact that the older adult population is becoming, in the last decades, more aware of the benefits of preventive therapies and their impacts on their health (Chen et al., 2013a, 2013b).

Due to changes on the demand side, the offer has been diversifying to complement classic thermalism (Ferreira et al., 2022). The establishments have needed to reinvent themselves, evolve and present wellness services in addition to the healing services of classic thermalism. Therefore, the emergence of the need to study how wellness thermalism is growing compared to classical thermalism is essential. This is the case in the Portuguese thermalism market, in which demand has changed over the last decade and where the COVID-19 pandemic presented difficulties for thermal establishments to overcome the consequences of the consecutive lockdowns of health services providers. Wellness services can also be a solution to overcoming such

a demand crisis. To better understand how the demand for classical and wellness thermal services evolved in Portugal in the last decade and, in particular, before and after the COVID-19 pandemic is presented this study. This aim will be achieved by applying exploratory and cluster data analysis to a Portuguese administrative database containing the number of user registers and revenues generated by each type of thermal services from 2012 until 2022.

The paper is divided into five sections. After this introduction, the section of the literature review on well-being and wellness, health and wellness services and thermalism is presented. Section 3 presents the methodology adopted, and Sect. 4 presents the results. Section 5 closes the paper.

2 Literature Review

2.1 *Well-Being and Wellness Concepts*

The exact and consensual definition of well-being has proved to be a challenge. There was some lack of consensus in the literature regarding its dimensions and implications in other scientific areas (Gorton, 1988). Only in the 1950s did the “Welfare Movement” begin to be studied and given due importance in the scientific field. Halbert L. Dunn, one of the foremost and early pioneers of the “Wellness Movement”, emphasised in his lectures that health was not the mere absence of disease, as was advocated, but a complete state of physical, mental and social well-being (Dunn, 1957). This new perspective impacted the scientific environment since, until then, the predominant philosophy in the health field was the dichotomy between health and disease (Dunn, 1959; Larson, 1999).

Despite this lack of understanding, the WHO itself, in 1946, when it was founded, included the issue of well-being in its definition of “health” and emphasised that it is not enough to have the absence of disease for a person to be healthy (World Health Organisation, 1946). The definition of well-being for several researchers started from this same principle (Adams et al., 1997; Dunn, 1977). In the mid-twentieth century, the concept of wellness was introduced into the definition of health but needed further elaboration. More recent studies justify that the lack of precision about the wellness concept is due not only to the fact that it is interchangeable depending on its context (Smith & Puczko, 2008) but also because wellness is subjective and relative (Adams, 2003).

Although there is no precise definition of well-being, most researchers, in addition to focusing on the relationship between well-being and the human being, also focus on the dimensions of well-being (Chi et al., 2020). According to Gorton (1988, p. 25), “wellness is a balance and harmony among body, mind, spirit, and emotions in an ever-changing environment”. Although quite similar to Dunn’s definition, he adds the dimension of “emotion” since he believed that the dimensions of well-being could not be reduced to a three-dimensional framework—body, mind, and spirit

(Dunn, 1959). If the new paradigm adopted a more holistic view of the human being, emotions could not be excluded as they produce energy and often dictate the state of mind (Gorton, 1988). Myers et al., (2000, p. 252) definition and wellness dimensions align with Dunn's. They define wellness "as a way of life oriented towards optimal health and well-being in which the individual integrates body, mind, and spirit to live more fully within the human and natural community". Dunn's Three-Dimensional Model continues to be widely accepted by the scientific field, although some believe the triangular model is too reductionist. Ardell (1977), for example, proposed a five-dimensional model—self-responsibility, physical fitness, nutritional awareness, stress management, and environmental sensitivity—with self-responsibility being at the centre of the concept of well-being. Gorton (1988) agreed that well-being was only achieved through self-care and self-responsibility, as it is a mindset of acceptance and lifestyle awareness. Everyone should be responsible for meeting their needs, considering the well-being of body, mind, and emotions. However, from the perspective of the National Wellness Institute (n.d.), continuing the work of Bill Hettler, it considered that there were six dimensions, four of which were internal (emotional, spiritual, physical, and intellectual) and two external (occupational and social). Over time, several researchers have contributed to the evolution of the study of the concept of well-being and its dimensions. Elements such as social contact (Mueller & Kaufmann, 2001) and spirituality (Sweeney & Witmer, 1991) have been incorporated into the dimensions of well-being.

It can be seen that despite the lack of agreement, especially with the concept's dimensions, there is an alignment regarding the nature and core idea of well-being (Roscoe, 2009). Well-being implies that human beings seek a healthy balance in their lifestyle (Mueller & Kaufmann, 2001), aiming at improving their quality of life (Renger et al., 2000) and achieving the optimal level of health and well-being (Myers et al., 2000). Another point that several researchers in this area agree on is that well-being should not be seen as something static (Chi et al., 2020; Lafferty, 1979; Myers & Sweeney, 2007). According to Dunn (1977, p. 4), achieving a high level of wellness "requires that the individual maintains a continuum of balance and purposeful direction within the environment where he is functioning".

In recent decades, the promotion of a healthy and balanced life has increased at an exponential pace and has become the focus of societies (Chen et al., 2013a, 2013b), and this trend has only become even more pronounced with the COVID-19 pandemic (Farkić et al., 2020; He et al., 2021; Li & Huang, 2022). The concern arises from several factors, such as modern society's pace, pressure, and stress (Smith & Puczko, 2008), rising healthcare costs and increased demand for and reliance on more holistic and alternative healing therapies (Voigt et al., 2011).

2.2 Health and Wellness Tourism

Consequently, the awareness of the importance of a healthy lifestyle has motivated the search for tourist destinations that somehow improve the quality of life, level of health

and well-being of the tourist (Alonso-Álvarez, 2012; Ferreira et al., 2022; Kitchen, n.d.; Rodrigues et al., 2020; Vaz et al., 2022; Wen et al., 2021). Terms such as health tourism, medicinal tourism, and wellness tourism are this segment's most common designations (Lopes & Rodríguez-López, 2022). However, the problem arises when these are used interchangeably (Smith & Kelly, 2006) since "there is a range of positions, terms, and categories depending on which author one considers" (Wright & Zascerinska, 2023, p. 175). This ambiguity is not the result of a lack of research in the area, since in the last two decades, interest in this topic has increased exponentially (He et al., 2021; Huijbens, 2011), and the volume of scientific production on the implications of well-being in tourism is proof of this (Chang et al., 2022). According to the study by Hall (2011), since 2006, there has been a continuous increase in articles on health and medical tourism. Thus, some authors justify the imprecision by the variation of concepts and perceptions of health and well-being depending on the cultural context (Huang & Xu, 2014; Huijbens, 2011; Smith & Puczko, 2008).

Health tourism is generally identified with a broader term with two main domains: medical or medicinal tourism and wellness tourism (Gulyas & Molnar, 2023). Yeung and Johnson (2018) distinguish between wellness tourism and medical tourism using the assumption of tourist motivation. According to them, wellness tourists travel to maintain, manage, or improve their health and well-being. They are motivated by the desire to prevent illness, reduce stress levels, manage and reduce less healthy habits, and seek authentic experiences. In other words, their action is proactive, entirely voluntary, and non-medical. In contrast, according to the authors, medical tourism results from the desire to access health services that are more accessible, have shorter waiting times, or offer specialised treatments not available in their place of residence. In other words, its action is reactive, medically necessary, and there is medical intervention (Yeung & Johnston, 2018).

Smith and Puzkó (2008) are apologists of the same ideology, where in medical tourism, the treatment of pathology is a mandatory requirement, while in wellness tourism, the focus is on prevention. Medical tourists usually seek a wide range of services, from cancer treatments, dental treatments, surgeries, cosmetic surgeries, and fertility treatments to euthanasia (Gill & Sumant, 2019; Higginbotham, 2011). Mueller and Kaufmann (2001, p. 7) present a generic definition and do not use the curative and preventive dimensions, defining wellness tourism as "the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motive is to preserve or promote their health".

In 2011, the Global Spa Summit developed a model to better understand these two tourism domains by developing a matrix with two axes. The horizontal axis presents a "continuum of product/service offerings that ranges from conventional or "generic" services/experiences (which may be available anywhere) to authentic or "location-specific services/experiences (which spin out of a country's special traditions and natural assets)" (Global Spa Summit, 2011, p. iii). On the vertical axis, it places wellness tourism and medical tourism oppositely. Thus, four quadrants are created that represent the health-related tourism market.

Wellness tourism has been growing for two decades (Huang & Xu, 2014; Voigt et al., 2011) and is expected to continue (Yeung & Johnston, 2021). According

to Dillette et al. (2021), wellness tourism is a dimension of tourism with a high added value since, on average, its spending is 60% higher than that of an ordinary tourist (Yeung & Johnston, 2018). Thus, it has become imperative to understand the underlying motivations of wellness tourists to be able to respond to their needs and expectations. According to Lee and Kim (2023), the grounds of a wellness tourist can be divided into six variables: (1) relaxation/healing/health improvement; (2) self-examination/education; (3) sympathy for nature; (4) luxury/prestige; (5) improvement of social relationships; and (6) novelty.

2.3 Thermalism

Water use for health promotion purposes is a practice that dates back to antiquity (Erfurt-Cooper & Cooper, 2009; Migliaccio, 2018; Moss, 2010). There are several historical and archaeological evidence of the use of geothermal resources by Japanese, Roman, Turkish, Icelandic, and European people for bathing, as they believed in their healing powers (Alonso-Álvarez, 2012; Lund, 2009; Taofeek et al., 2020). Río-Rama et al. (2018) identify three types of therapies with water as the central resource: thalassotherapy, spa and thermalism. What distinguishes them is the type of water used. Thalassotherapy uses seawater, spa uses “normal” water, and thermalism uses mineral water. Mineral waters are generated through specific geological conditions (Araújo et al., 2015a), having three fundamental characteristics: natural origin, bacteriologically pure, and therapeutic potential (Ghersetich et al., 2000).

Several studies show evidence of the therapeutic effects of the practice of thermalism in different pathologies and disorders, such as respiratory, digestive, dermatological, musculoskeletal, diabetes, and cardiovascular diseases, among others (Martins et al., 2021; Pereira et al., 2021; Silva et al., 2023; Taofeek et al., 2020). However, a thermal spa does not only provide rehabilitation and healing services. In fact, according to the definition established by Article 2 of the *Decreto-Lei* no. 142/2004 of 11 June of the *Diário da República Portuguesa*, a thermal spa is defined as an establishment that provides health care using natural mineral waters for “disease prevention, therapeutic, rehabilitation, and health maintenance purposes and may also practice complementary and supporting techniques for those purposes, as well as thermal well-being services”. In other words, thermalism is indicated for its curative and preventive benefits through relaxation.

Traditionally, the main focus of thermalism was on the healing dimension, with the tourists essentially seeking treatment and relief from various pathologies—that is, a so-called classical thermalism predominated. However, there was a paradigm shift in thermalism over time, and the wellness dimension became gaining importance (Ferreira et al., 2022). According to the study by Chen et al. (2008), when a consumer seeks services and experiences in wellness resorts, the primary motivation is the relaxation of body and mind—hence the marketing strategies reinforce the differentiating experience of relaxation. The study also identifies that the second

reason is the range of activities available. That is, they seek the possibility of being able to diversify. And thirdly, they seek contact with nature. People started to seek out thermal spas not only when they were ill but also as a form of preventive care and to promote general well-being. This shift in focus has been observed in Portugal, a country with an extensive tradition of thermalism (Costa et al., 2015). According to the study by Ferreira et al. (2022) on the profile of thermal establishments users, there has been a progressive change in the number of users in recent years. Currently, thermal therapies and treatments are sought mainly by women. As for the age group, it is still quite aged, being between 50 and 75 years old. However, although the youth segment is not very significant, it is increasing. The researchers identified several studies that indicated that financial capacity was above average, as well as academic degree.

3 Methodology

In Portuguese thermal establishments—dating back to around 2,000 years ago to the Roman baths (Cantista, 2010)—the services provided were traditionally therapeutical (classical thermal services). According to Araújo et al. (2015b), due to its geological variability, which enables the existence of thermal waters with a high diversity based on physicochemical composition, Portugal offers a wide variety of thermal therapeutic services. However, the thermal service demanders request more wellness services over time, and a shift is observed in the thermal service demand. The COVID-19 pandemic dramatically impacted thermal establishments due to lockdowns imposed on health services providers and, therefore, on the thermal establishments offering classical (therapeutical) thermalism services. The availability of administrative data on the number of users recorded in thermal establishments and the income generated by those specific users allows us to understand the evolution of classical *versus* wellness thermalism before and after the COVID-19 pandemic.

In the first place, this study uses descriptive statistical methods to understand how registers shifted between classical and wellness types of treatments (looking in particular at the period before and after the pandemic) and, in the second phase, a hierarchical cluster analysis. Hierarchical cluster analysis is a mathematical algorithm that groups similar objects into groups called clusters. In this case, each cluster will group the Portuguese thermal establishments by type of treatment and the subsequent income generated to understand if they changed their treatment approach over time, particularly after the pandemic. The study intends to find a set of comparable thermal establishments clustered together where each group is distinct from the others, and the establishments within each cluster are broadly similar. The Euclidean distance between two clusters and Ward's linkage criteria, which reduces the sum of squared distances of each observation from the average observation in a cluster, will be applied (Köhn & Hubert, 2014; Wierzchoń & Kłopotek, 2018).

Data is collected by the Portuguese *Direção Geral de Energia e Geologia* (DGEG) and by the *Associação de Termas de Portugal* (ATP) to describe registers on classic

(therapeutic) and wellness thermal services and the respective income generated from 2012 to 2022.

4 Results

The evolution of thermal users' records by type of thermalism is visually clear in Fig. 1. The figure shows how the number of records by type of thermal treatment evolved from 2012 until the last year registered, 2022. Such evolution translates into tendency lines that indicate the negative trend in the number of classical registers over time and the positive trend in the number of wellness registers.

Indeed, in Table 1, it is possible to observe the relative distribution of registers by type of treatment and, additionally, the average annual growth rate observed by branch over the period. Apart from the two first years in analysis (2012 and 2013), where classical and wellness thermalism presented approximately the percentage of registers (with 2013 showing a bigger number of records in classical thermal treatments), all the other years offer a clear shift towards wellness. On average, wellness demand increased by 3.08%, while classical demand decreased by 4.32%.

Going further, Tables 2 and 3 start presenting the microeconomic analysis of the active establishments and their respective relative registers and income generated.

Over the last decade, the number of active thermal establishments, mostly located in the North of Portugal, varied between 37 (in 2012) and 46 (in 2019, the years before the pandemic started). During the pandemic, active thermal establishments decrease to minimum values. Last year (2022), the number of active thermal establishments began to increase but is far from the maximum values presented before the pandemic. It should be noted that various Portuguese thermal establishments remained closed during the study period, and several did not register clients (zero registers).

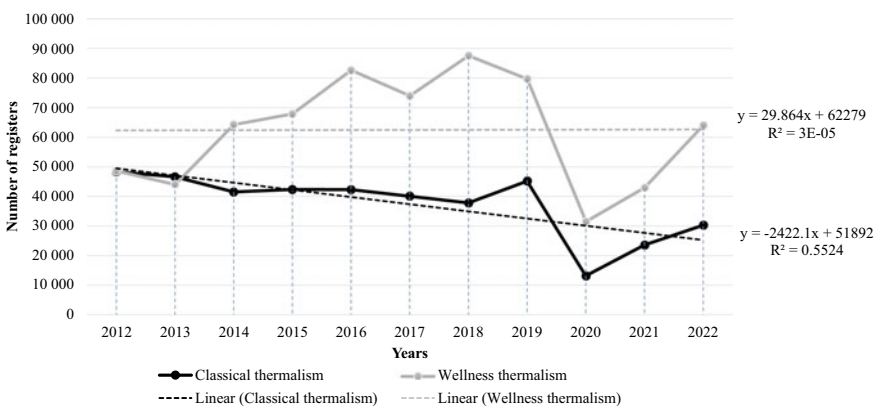


Fig. 1 Trend evolution of thermal users registered on classical and wellness thermal treatments from 2012 to 2022

Table 2 Evolution of the ratio wellness/ classical registers from 2012 to 2022

Years	Valid	Absent	Median	Mean	Standard deviation	Coefficient of variation	Minimum	Maximum
	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	%	<i>n</i>	<i>n</i>
2012	37	15	0.3	2.6	6.6	256.8	0.0	38.1
2013	40	12	0.4	3.0	8.5	280.6	0.0	48.2
2014	40	12	0.5	3.9	8.7	224.4	0.0	43.4
2015	40	12	0.5	3.7	9.6	261.5	0.0	56.7
2016	40	12	0.8	6.0	18.8	315.1	0.0	107.7
2017	40	12	1.0	7.4	24.1	325.0	0.0	141.6
2018	43	9	1.5	40.5	150.4	371.1	0.0	926.0
2019	46	6	1.2	10.7	28.4	266.4	0.0	152.7
2020	38	14	1.8	37.0	163.6	442.6	0.0	995.0
2021	37	15	1.6	6.5	16.3	250.7	0.0	91.4
2022	39	13	1.4	9.7	27.4	281.5	0.0	159.8

Table 3 Evolution of the income generated in thermal establishments, by person, from 2012 to 2022

Years	Valid	Absent	Median	Mean	Standard deviation	Coefficient of variation	Minimum	Maximum
	<i>n</i>	<i>n</i>	€	€	€	%	€	€
2012	37	15	152.1	156.6	84.1	53.7	32.1	396.3
2013	40	12	158.0	151.1	82.1	54.3	0.0	315.4
2014	40	12	138.1	132.3	85.4	64.5	0.0	321.8
2015	40	12	130.6	142.4	95.4	67.0	18.8	413.1
2016	41	11	123.8	132.0	93.9	71.1	0.0	442.1
2017	40	12	114.5	137.5	88.7	64.6	19.9	339.6
2018	44	8	112.5	115.6	77.8	67.3	0.0	252.1
2019	46	6	117.5	130.4	109.3	83.8	14.8	677.9
2020	40	12	83.2	106.0	74.1	69.9	0.0	258.5
2021	38	14	108.1	121.6	66.7	54.9	15.9	265.7
2022	39	13	118.7	135.8	98.0	72.1	6.3	428.1

Table 2, in particular, presents the statistical distribution of the ratio of registers between wellness and classical thermalism. In 2012, on average, the 37 active establishments recorded 2.6 wellness users by each classical client. This number increased to almost 41 wellness users for each classical one. The number decreased drastically when the pandemic started in 2020 but recovered faster in the second year of the pandemic. This resulted from the lockdown that demanded the closure of all health service providers (where classical thermalism is included) during most

of the pandemic. Wellness providers, however, were authorised to open and offer services. In 2022, without lockdowns that restricted some of the services supplied, the ratio between wellness and classical services started increasing again, reaching values higher than the ones observed in 2017 but not yet the values observed in 2018. The start of a war in Europe and the consequent economic crisis may affect the demand for thermal services. However, a longer time is needed to be sure of such a trend and the reasons for explaining it. Another note that should be made regards the enormous heterogeneity observed among the registers made by thermal establishment. The coefficient of variation that indicates, in percentage, the standard deviation observed stands between 250% and almost 443%. Thermal establishments in Portugal differ a lot regarding the relative rate of users, which indicates the need to understand better how they differ and how they may be similar.

Table 3 presents the income generated by person registered in Portuguese thermal establishments. In 2012, the value reached almost 153€/person, and the value is being decreased, even if not steadily. During the first pandemic year, the value reached 106€/person, and last year, the value increased to almost 134€/person. Also, for this indicator, the coefficient of variation shows a significant difference among thermal establishments. The justification is the income generated by the type of thermal treatments. Classical thermalism demands a stay in the thermal establishment for at least 12 days, while around 90–95% of the demand for wellness thermalism has lasted just one day since 2016 (Turismo de Portugal, 2022). The difference in the duration of stay inevitably affects the income generated. According to the numbers of the association of Portuguese thermal establishments (Turismo de Portugal, 2022), in 2021, each person who demanded classical treatment spent an average of 273€ while each wellness client spent, on average, around 45€.

The thermal establishments in Portugal are heterogeneous, being necessary to cluster such establishments to understand if the tendency observed on average happens for all the establishments. Being not possible to analyse thermal establishments one by one, the research will group them regarding the registers by type and the income generated per person. Three years were chosen to understand how thermal establishment groups are characterised and how they evolved—the year that represents the beginning of the analysis period (2012), the year before the pandemic started (2019), and the last year with available data (2022). Figure 2 and Table 4 show how many groups should be considered each year, using the Elbow method plot for the lowest BIC value.

For 2012 and 2022, the Portuguese thermal establishments could be clustered into four groups. In 2019, before the pandemic, the thermal establishments were more heterogeneous, and it is possible to cluster them into five groups. After the pandemic, the results return to values similar to those of the beginning of the analysis period.

In the three years, one thermal establishment is entirely different from others. It has the most registers on classical thermal treatments and the one with the highest income per person. It may be considered an outlier on the Portuguese landscape of thermal establishments. In 2012 and 2019, it is possible to find a cluster of thermal establishments with a classical thermal vocation—they present a higher value of registers on classical thermal treatments. They also have the highest income per person (except

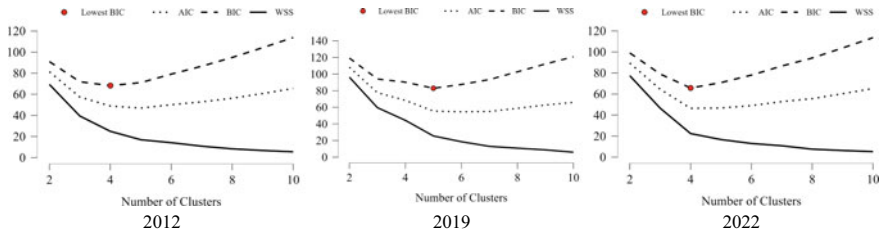


Fig. 2 Elbow method plot for defining the optimal number of clusters for 2012, 2019, and 2022

Table 4 Criteria for defining the optimal number of clusters for 2012, 2019, and 2022

Clusters	N	R ²	Criteria		
			AIC	BIC	Silhouette
4	37	0.7	53.2	72.5	0.3
5	46	0.8	55.5	83.0	0.3
4	39	0.8	48.2	68.2	0.4

Note The model is optimised with respect to the *BIC* value

the outlier). In 2019, the difference in the income per person is not so different, however, than the thermal establishments with a good balance between classical and wellness services. In 2022, after the pandemic, the cluster of thermal establishments with classical vocation disappeared to give place to thermal establishments that balance the two types of services and, therefore, can also balance the income per person. These are the establishments that present the highest income per person nowadays. Another clear change is the tendency for several thermal establishments to present a vocation for offering wellness services. These services are attracting an increasingly significant number of registers compared to classical thermalism registers. They still keep a large number of classical records and are, therefore, able to present a vital source of income per person. The number of establishments with the most prominent wellness vocation is relatively stable, even if a decrease in these establishments is decreasing over time—pure wellness thermal establishments are being reduced in the Portuguese market and replaced by establishments with a more diversified supply.

The values presented in Table 5 can be observed in Fig. 3, where the clusters’ differences are well visible. The cluster with just one observation is not shown in the figure.

Table 5 Distribution of thermal establishments and the respective mean value by cluster and variable

Years	Clusters		Number of establishments	Income/ person	Registers_ CT	Registers_ WT
				€	<i>n</i>	<i>n</i>
2012	1	Classical vocation	11	203.3	2054.0	485.9
	2	Balance vocation	14	184.3	352.6	129.1
	3	Wellness vocation	11	67.0	699.1	3545.8
	4	Outlier	1	239.6	13,117.0	2434.0
2019	1	Classical vocation	10	155.7	1852.7	1211.6
	2	Balance vocation	22	154.6	248.9	351.5
	3	Tends to a wellness vocation	6	68.9	541.3	2470.5
	4	Wellness vocation	7	55.7	802.9	5439.0
	5	Outlier	1	236.4	12,306.0	6943.0
2022	1	Balance vocation	21	160.6	270.7	368.7
	2	Tends to a wellness vocation	12	120.7	960.3	1795.3
	3	Wellness vocation	5	55.8	791.8	5663.2
	4	Outlier	1	198.8	9080.0	6448.0

5 Final Remarks

As mentioned, thermal tourism is expected to be one of the biggest trends by 2023. Therefore, besides classical thermal treatments traditionally offered in leading Portuguese thermal establishments, these establishments are offering wellness services and a shift is clearly observed in Portugal. The tendency towards wellness services is positive and growing, while the supply of classical services decreased in absolute and relative terms. Over time, and especially after the COVID-19 pandemic, establishments with a classical vocation were replaced by establishments with a more balanced vocation—they offer in a balanced manner both types of services and are able to increase the income generated per person. These results indicate that the Portuguese thermal market is being able to match its supply to the growing demand

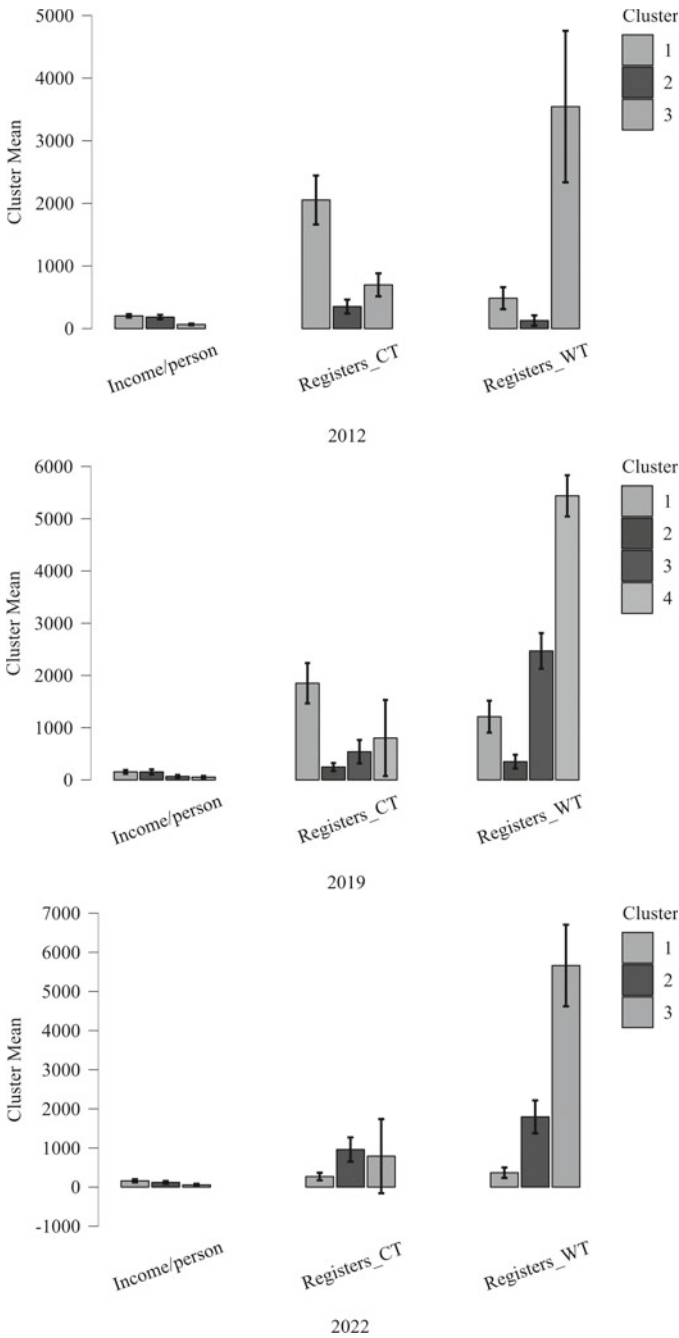


Fig. 3 Mean value of the variables by cluster and year

for wellness and to answer the increasing requests for a balanced life where health and well-being are interlinked and indivisible.

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Strategic Approach to Thermal Tourism During and After Covid-19



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Abstract Health and wellness have become important motives for consumption, attracting the researchers' interest. One of the current challenges in academic research and in the wellness tourism industry is the conceptual development related to the key term wellness. In recent years in Europe, classical thermalism, focused essentially on the “cure” dimension, has been replaced by modern thermalism, which is particularly based on the “wellness” dimension, and the offer is more focused on

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preventive therapeutic motivations, combined with recreational and tourism aspects. Although the pandemic period led to the stagnation of tourism businesses, health tourism capitalized on the opportunity and developed successfully from the impact of the pandemic. The main objective of this work is to understand the challenges and strategies of the sector during and after Covid-19, namely whether the impact of the pandemic confirmed the need to reassess products and services, with complementary and composite offers that combine nature, sports, and nutrition, among others. A qualitative methodology approach was used to answer this objective, drawing on semi-structured interviews. The results report the challenges that Covid-19 represented to the sector, regarding the expenses increasing with disease prevention and equipment maintenance, the lack of investment, and the decrease in wellness products consumption.

Keywords Thermal tourism · Wellness · Health · Covid-19 · Tourism industry

JEL Classification Z32

1 Introduction

Thermal tourism has, over the past few years, been increasingly recognized for the healing properties of its waters and its important role in disease prevention, whereby, thermalism as a tourist activity has on an international scale, positively optimized the economies of several countries. In recent years in Europe, classical thermalism, focused essentially on the “cure” dimension, has been replaced by modern thermalism, which is particularly based on the “wellness” dimension, and the offer is more focused on preventive therapeutic motivations, combined with recreational and tourism aspects.

Especially in the twenty-first century, spas have undergone a reinvention, with new concepts and services adapted to current needs, such as physical and psychological well-being. Health tourism reflects the motivations of a group who are driven by medical and healthcare treatments, with ideals linked to spas. Following this trend, spas are recovering some dynamism in the diversified supply, which considers not only the therapeutic assumptions but also a holistic perspective, including simultaneously health and well-being.

Due to this development, health and wellness have become important motives for consumption, attracting the researchers’ interest. One of the current challenges in academic research and in the wellness tourism industry is the conceptual development related to the key term wellness.

The Covid-19 pandemic also represented a challenge to the sector. The worldwide health crisis in 2020 led to a global economic crisis with strong consequences

for the tourism industry. Several measures were adopted to combat and decrease the contagion, such as social isolation, which significantly impacted people's lives, contributing to financial, psychological, and family imbalance (Corbari & Grimm, 2020). During the pandemic, fear intensified stress and anxiety levels in healthy people and also increased the symptoms of those with pre-existing mental disorders, having motivated the search for health and wellness sites (Oliveira et al., 2020).

The general purpose of this study is to understand the challenges the sector experienced through Covid-19, identifying the strategies developed by the stakeholders during and after the pandemic. To meet this objective, a qualitative approach methodology was used, using semi-structured interviews with stakeholders from different countries in Europe, including Portugal, Spain, Italy, France, and Hungary. Emphasis is placed on the increase in expenses associated with the disease (masks, sanitizers, and electricity), the lack of investment in the area, the high maintenance costs of the equipment, and the fact that wellness is still associated with luxury products, and therefore unaffordable for everyone. The research findings provide insights that are useful for the tourism industry to better prepare for future challenges, considering health and wellness in the post-Covid-19 period.

Currently, health and wellness tourism is in a phase of rejuvenation, with the appearance of new investments and an increasingly diversified offer for those who seek it. The research findings also provide insights that are useful to better prepare for future challenges in the health and wellness sector.

The paper follows an organized sequence based firstly on literature relating to the latest evolution of thermal tourism in Europe, providing a conceptual clarification on wellness in the broad spectrum of health and wellness tourism, followed by the analysis of the impact of Covid-19 on the sector and the challenges that are foreseen; the methodology presents the objectives of the research, and describes the development of the empirical study, mentioning the data-gathering process and data analysis. Results are then presented, and the theoretical and managerial implications are highlighted. General conclusions are drawn, research limitations are mentioned, and recommendations for future research are expressed.

2 Thermal Tourism in Europe

Tourism plays a key role in economic development, being one of the largest sectors worldwide in terms of turnover. Consequently, health tourism is considered a strategic product that remains at the bottom of the hierarchy of vacation destinations. As time went by, several indigenous thermal cultures grew up, and Europe has one of the richest and most documented territories where thermal springs proliferate, the use of which started in the Greek and Roman cultures, being part of their daily routine. In recent years in Europe, classical thermalism, focused essentially on the "cure" dimension, has been replaced by modern thermalism, which is particularly based on the "wellness" dimension, and the offer is more focused on preventive therapeutic motivations, combined with recreational and tourism aspects.

According to the study of Rocha and Brandão (2014) it was possible to distinguish two distinct thermalism segments, classic thermalism and wellness thermalism. The first segment was defined as that which represented an offer organized to satisfy a sought-after motivation based on identified pathologies or recoveries, with a merely therapeutic objective while the second segment was defined as that in which the offer was aimed at clients where the main motivation sought was leisure, tourism, or therapeutic recreation. In line with the thinking of Tzedopoulos et al. (2018), “modern”/wellness thermalism has led to a decrease in elderly visitors, but on the other hand, the younger community is increasingly attracted by wellness services, which seek to establish harmony and care between body and mind. Following this trend, spas are starting to regain some dynamism in betting on a diversified offer, which not only considers the therapeutic assumptions but also a holistic perspective, which simultaneously includes the assumptions of health and wellness (Kervankiran, 2016).

2.1 The Wellness Dimension of Thermal Tourism

The concept of health and wellness tourism “Health tourism is considered nowadays to be an emerging, global, complex and rapidly changing segment that needs to be comprehended to a greater extent in order to leverage opportunities and better address challenges” (UNWTO & ETC, 2018). In recent years health and wellness have increasingly gained prominence and relevance in many global and emerging destinations where the association with the tourism sector has grown and is recognized as one of the most important strategic products. Inclusively, health tourism, due to various economic and social circumstances has led people to achieve a better quality of life (Quintela et al., 2016). This rapid growth is mainly due to economic and socio-demographic factors that have been influencing the world population, such as the increase in the elderly population, particularly in Europe, and the changes in lifestyles that are increasingly intensified and marked by stress, poor eating habits, unhealthy lifestyles, among other reasons. In this way, the health tourism industry has been growing rapidly in recent decades with a focus on healing the mind, body and well-being. The baby boomer generation has the highest disposable income and the highest propensity to travel to these destinations (Brandão et al., 2021; Liberato et al., 2021; Lopes et al., 2018, 2023; Quintela et al., 2016). In this context, wellness emerges as a modern word with ancient roots. The key principles of wellness, as holistic and preventive, go back to “ancient civilizations from the East (India, China) to the West (Greece, Rome)”. In the nineteenth century, Europe, and the United States, developed a set of holistic and natural approaches, which led to wellness being focused on preventative care. Holistic wellness modalities then began to gain more visibility in the 1960s/70s (GWI, 2019). Wellness began to be more developed in the mid-1990s in European countries with significant health spa offerings, such as Germany, Italy, Austria, Switzerland, and Hungary. The wellness concept allowed spas to reformulate their image, sometimes associated with therapies and treatment

of patients, and become important destinations for wellness tourism. In addition, the concept of wellness is currently considered one of the methods of preventing future diseases in increasingly ageing societies and aggregates a holistic approach that aims at the mental and spiritual harmony of the human being (Erfurt-Cooper & Cooper, 2009). In recent decades, and especially in the twenty-first century, spas have undergone a reinvention, with new concepts and services adapted to current needs, such as physical and psychological well-being. Health tourism expresses more and more motivations of a group of people who are driven by medical treatment and care of their health, with ideals linked to spas. Hotels and resorts have become important wellness centres, betting on spa facilities, whose goal is to attract more customers by offering quality therapies at reasonable prices. The traditional health services of spas have been replaced by the popularity of services that seek to establish a balance and satisfy healthy lifestyles, such as reducing stress and counteracting the recent problems of today's society (Anaya-Aguilar et al., 2021). The concept of wellness is focused between balance and personal growth, and according to the study by Peterson et al. (2018) and Erfurt-Cooper & Cooper (2009), which addresses the characteristics of wellness practitioners, values and interests are considered, and, wellness can appear in any state of health, desirable or undesirable.

Modern society has made some achievements over time in various fields of knowledge. However, its fast pace of life has brought numerous consequences for its health, an essential pillar. The high level of stress accumulated and experienced daily has resulted in various cardiovascular problems, colds, obesity, and various types of cancer, all of which are detrimental to our quality of life (Godbey, 2009). For these reasons, people have been travelling, not only for health reasons, but also in order to improve their health based on therapies, crucial for physical and psychological well-being (sports, healthy meals, and entertainment, among others) (Šušić & Dimitrijević, 2015).

In addition to this, wellness can allow people to recover from their internal imbalance and improve their quality of life, as this experience can generate a sense of harmony. In the context of health tourism, the concept of wellness emerges, more specifically and focused on health prevention, which has various health care, to improve the quality of life of those who practise it.

3 Changes in Health and Well-Being During and After the Covid-19 Pandemic

In 2020, the world faced one of the biggest health crises in recent times, the emergence of Covid-19, thus affecting people and businesses. With the disease came restrictions, more impactful in tourism, with the restriction of movement between countries, hindering the tourism business. The Covid-19 pandemic impacted not only industries and personal lifestyles but the entire global society. It was a worldwide disease, unlike others that were limited to certain countries, and it is still present

today as one of the most infectious diseases. The efforts of various stakeholders, such as governments and professionals, were essential to overcome all the challenges posed by Covid-19 (CCSA, 2020). With travel restrictions, quarantines, and social distancing measures, tourism and other sectors have seen their activity increasingly limited, leading to a worldwide economic crisis (Bakar & Rosbi, 2020). Due to the unexpected outbreak of Covid-19, the tourism sector was forced to slow down its activities. In this context, spa tourism was then the tourism product that had a high importance and a health dimension that complemented and mitigated the effects of the pandemic, in the recovery phase. The need for treatments around spas, wellness, and health activities, proved to be important in mitigating the economic crisis of this sector (Pinos Navarrete & Shaw, 2021). Two years later, the Covid-19 disease revealed itself to be more dangerous than other previous diseases, and it ended up affecting all sectors of activity, especially the hotel and tourism industry, thus requiring greater measures and actions that impacted the lives of societies (Park et al., 2022). Although the pandemic period led to the stagnation of tourism businesses, health tourism took the opportunity and developed under the impact of the pandemic. Health tourism has demonstrated its high importance in relieving the current pressure experienced and how to relax the body and mind, however according to Cheng et al. (2021) the same sector should strengthen after the pandemic better products to be able to maintain the current level of demand. The tourism industry worldwide was, prior to Covid-19, in remarkable growth, with many investments and business expansions by tourism companies due to demand. According to Saengtattim et al. (2022), if companies and governments do not adapt and create more effective management systems, the intensification of the disease again, they will have to shut down their operations, however, the impact of Covid-19 on mankind and will be inevitable.

Szromek and Polok (2022) consider that experiences throughout the pandemic have proven that tourism entities can be extremely important in performing lifesaving functions, such as medical tourism, and offering disease recovery activities in places like spas. They also mention the importance of cooperation with the local community, which in an unforeseen global threat, such as Covid-19, can be a key solution.

The prohibition of movement and the closing of borders has led to the tourism sector being the most directly affected provoking a decrease in tourist arrivals, from 60 to 80% (UNWTO, 2020), at the beginning of 2022. The aviation sector suffered from the pandemic, an impacting drop in the number of trips, about 90% (CCSA, 2020), which were restricted in most countries due to the rapid evolution of the disease. On the other hand, it contributed to the reduction of pollution caused by air travel. The great financial pressure caused by the fall in traffic has also greatly influenced the tourism sector, causing high levels of unemployment.

The spa sector with the pandemic saw opportunities to reinvent its health character with the communities. In the view of Pinos Navarrete and Shaw (2021), tourism management of post-pandemic spa spaces should seek to reopen with quality and safety in their services and seize the moment to open new horizons.

4 Methodology

The general purpose of this study is to understand and explore the challenges and strategies of the sector during and after Covid-19.

In the scope of this paper, the methodology adopted relies on qualitative research. According to Merriam and Grenier (2019), this method figures as the most appropriate in the search to understand a certain phenomenon or vision and how people understand and experience their world at a particular time and in a particular context.

To develop the empirical study, an interview guide was designed to align with the specific objectives of the research. Based on the literature review, and on industry challenges the industry faced during and after the pandemic.

4.1 Sampling and Data Collection

The target of this research is entities in thermal tourism, located in the five countries under study: Portugal, Spain, Italy, Hungary, and France. Sample size in a qualitative study is generally influenced by the specificity of the participants, which determines the number of participants, in other words, “more specific samples require more homogeneous characteristics”, leading to smaller participant sizes. The sampling technique used will be theoretical sampling. The interviews were aimed at all the thermal establishments and all the thermal regions that had responsibility for promoting wellness services. Stakeholders with the most extensive expertise and knowledge were selected to describe all the challenges caused by Covid-19, since they were at the pandemic’s forefront in this sector.

4.2 Characterization of the Participants

The target of this research is all entities in the tourism sector, more specifically, in the area of thermal tourism, and they are located in the various countries under study: Portugal, Spain, Italy, Hungary, and France.

Through the interviews, it was possible to draw a socio-demographic profile that the age of the interviewees is between 42–58, with a minimum of 12 years of professional experience up to 30 years in the thermal sector. In relation to academic qualifications, except for one participant, all have higher education qualifications. In terms of the current functions they perform, most of them are directors.

5 Results

Through the analysis of the interviews, it was possible to identify the actions, strategies, and measures implemented by the thermal establishments during the pandemic and the impacts on the sector after Covid-19.

During the pandemic and even post-pandemic period, some interviewees mention the importance that good communication had in the reintroduction of their services, but they had to adopt rules to avoid the spread of the virus. To analyze the results, three main topics were analyzed to manage the crisis: communication (actions), guidelines (strategies) and security (measures) (Table 1).

5.1 Post-covid-19

Due to the unexpected outbreak of Covid-19, the tourism sector was forced to slow down its activities. In this context, spa tourism was then the tourism product that had a high importance and a health dimension that complemented and mitigated the effects of the pandemic, in the recovery phase (Pinos Navarrete & Shaw, 2021). The need for treatments around spas, on the positive side, has come to benefit the spa, both in preventing and curing disease (I1), although the pandemic period led to the stagnation of tourism businesses and health tourism took the opportunity and developed under the impact of the pandemic (Cheng et al., 2021).

Table 1 Main findings regarding the industry challenges during and after Covid-19, according to the selected categories

Categories	Results
Results Communication (actions)	<ul style="list-style-type: none"> • <i>“The most important thing in terms of communication was post-Covid, to continue to communicate what is our capacity for safety, the transmission of a service of excellence and safety”. (I10)</i> • <i>“After Covid, the big communication to relaunch the wellness activity after 2 years was social media, such as TV, local radio, local newspapers, and animation of our Facebook page”. (I5)</i>
Guidelines (strategies)	<ul style="list-style-type: none"> • <i>“Use of masks, frequent hand washing, safety distances, minimum 1.5 m, constant disinfection of the entire spa in common and treatment areas and proper disposal of waste (masks, gloves, etc.) in the containers provided for that purpose”. (I7, I4)</i>
Security (measures)	<ul style="list-style-type: none"> • <i>“What we did was communicate with the doctors, who had experience in medical biology, who gave their view that the waters, or bathing in a pool, or having a massage would not be a risk”. (I3)</i> • <i>“Coming to the hot springs was even beneficial and it has been proven, the risk that there was in the hot springs was contamination due to proximity, however, many establishments did not close because of this proximity (hospitals, public transportation...)”. (I1)</i>

According to the interviewees, lockdowns should be used for the development, of a re-evaluation of products that already exist, the industry should strengthen after the pandemic better products to be able to maintain the current level of demand (Cheng et al., 2021). Although health tourism has demonstrated its high importance in relieving the current pressure experienced and how to relax the body and mind, cannot forget that the most important thing is communication, the transmission of continuous safety, quality, and excellence of the services provided (I6, I10). Spa spaces should seek to reopen with quality and safety in their services and seize the moment to open new horizons (Pinos Navarrete & Shaw, 2021). A set of “post-Covid packages in spas and wellness facilities (retreats) that dealt with fatigue or immune boosting” (I2), and wellness services, psychological and physical, were thus created, valued even more due to the pandemic period, as well as nature activities and sports. One of the difficulties of spa spaces during the pandemic was their association with the spread of the disease. Even so, some refer that this association should not be related to the water, but to the proximity of people, where in some cases it was reported that “was communicate with the doctors, who had experience in medical biology, who gave their view that the waters, or bathing in a pool or having a massage would not be a risk” (I3). During the interviews, there was an interesting perspective, from one of the interviewees (I10), about the standardization of the thermal offer at a European level.

“The most important thing in terms of communication was post-covid, to continue to communicate what is our capacity for safety, transmission of a service of excellence and safety. A service that has all the concerns at the health level, in public health, with destinations highly connoted as safe. And this must continue to be communicated. A service that is not massified, but a service with quality”. (I10) “There was communication about the measures put in place internally to reassure our customers (use of masks, disinfection measures, limiting the number of people in the pools, control of passes...). After covid, the big communication to relaunch the wellness activity after 2 years was social media, such as, TV, local radio, local newspapers, animation of our Facebook page”. (I5) “Communication was mainly about hygiene and social distancing in spas because of the intimate nature of spa treatments and the close proximity to others in spa waters”. (I2).

The importance of partnerships and modernization of services arises to combat the usual treatments of thermal waters and offer more opportunities for consumers to enjoy a better-quality experience, with other options, beyond the so-called “classic” ones. The impact of Covid-19 confirmed the need to re-evaluate products and services, with offers that combine nature, sports, and nutrition, among others. Thus, during the pandemic, thermal tourism saw the opportunity to reinvent itself, in the face of a very stagnant business.

6 Conclusion

Regarding the challenges that the industry experienced during Covid-19, all interviewees identified a few challenges, such as the increased expenses associated with the disease (masks, disinfectants, labelling, electricity), the reduction of the establishment's capacity. The lack of investment in the area, the high maintenance costs of the machines due to the corrosiveness of the water, and the fact that wellness is still associated with luxury products, so it is not available to everyone. However, few authors mention these kinds of challenges experienced during the pandemic crisis. Despite the challenges that the pandemic brought to the industry, one of the main strategies revealed by the interviewees was good communication. The importance of continuous post-Covid communication about the safety of the places and the preservation of excellent services helped to restore some confidence to consumers, who still associated these sites with the greater spread of the disease. The use of social media (TV, social networks, radio, among others) was also considered by the interviewees to promote their products and services.

The theoretical contributions of this research work consist of providing a conceptual clarification on the term wellness as an extension of modern thermalism. In terms of practical contributions, this study provides objective data that allows an understanding of the challenges and strategies of the sector during and after Covid-19, in five of the main tourism markets in Europe.

Despite the findings, the main limitation of the study is based on the dimension of the sample. In terms of future research, the study can be enlarged to other countries, developing comparative studies to evaluate the long-term effects of the pandemic on health and wellness tourism.

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How Sociodemographic Characteristics May Affect the Thermal User's Perception of Illness, Quality of Life, Sleep Quality and Disability. A Portuguese Case Study



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Abstract Literature shows that thermal spas' users seek thermal spas for therapeutic and wellness reasons. If the effective improvement in the user's health status needs to be confirmed by clinical tests, the perceived improvement in the user's quality of life may be assessed using different validated quality of life scales like the EQ-5D-5L or the EUROHIS-QOL-8. Moreover, it is possible to use validated scales like BaSIQS to determine sleep quality, the HAQ-DI to evaluate the user's disability awareness, and the B-IPB to assess illness perception. All these scales were applied to a sample of users of the thermal treatments in Termas de Chaves, the second-biggest thermal spa in Portugal, before and after 14 days of treatment, allowing to gather an important set of statistical data to assess the evolution of the user's perception illness, quality of life, sleep quality and disability. Therefore, this research aims to understand if the sociodemographic characteristics of thermal users influence the results obtained. Therefore, a binomial logistic regression is applied to identify the user's features that affect the differences in the user's perception before and after treatments. The results show that, in general, after treatments, the users' perception is positive. However, only some characteristics of the users are statistically significant to explain such users' perceptions.

Keywords Thermal spas · EQ-5D-5L · EUROHIS-QOL-8 · BaSIQS · HAQ-DI · Portugal

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JEL Classification I10 · I30 · Z30

1 Introduction

Thermalism is defined as using “springs, rivers and sea waters at various temperatures for medicinal use” and is one of Europe’s most established and known spa practices (Capellini, 2012, p. 88). Nowadays, thermalism—sometimes called spa therapy due to the definition presented—is gaining a new interest worldwide as consumers seek ethical, natural and place-based wellness experiences. In Europe, the success rate of thermal healing has maintained the high reputation of thermal springs for healing powers (Stevens et al., 2018). The practice of thermalism to facilitate wellness and well-being is not new, and its renewed popularity rests on societal understanding of the need to focus on wellness and illness prevention (Smith & Puczkó, 2017; Stevens et al., 2018). Indeed, thermalism is believed to improve health with an emphasis on well-being, including relaxation, stress relief, depression and even recovery and energy reserves. Therefore, thermalism is being used to promote health and treat inflammatory and chronic processes, which is entirely related to the properties and composition of thermal mineral water (Araujo et al., 2015; Pereira et al., 2021). Several studies have been made in recent years to prove such belief, even if it is deemed more studies on the topic are needed to fully confirm the effectiveness of thermal mineral waters.

This research work intends to add insights into the effect of thermalism on thermal users’ perception of illness, quality of life, sleep quality and disability using as a case study a sample of users in a Portuguese thermal establishment in a holistic perspective. Thus, in this research work, to evaluate how sociodemographic characteristics influence the way users of thermal treatments perceive the effect of these treatments on various aspects of their health and well-being, five different scale instruments were used to assess, respectively, the quality of life (EQ-5D-5L or the EUROHIS-QOL-8), the sleep quality (BaSIQS), the user’s disability awareness (HAQ-DI) and the illness perception (B-IPB). The five instruments were applied to a sample of 222 thermal visitors in a Portuguese thermal establishment located in the north of Portugal—the Termas the Chaves thermal spa—between August and November 2021. The dataset obtained allowed to verify how sociodemographic characteristics may affect the perceived quality of life, sleep quality and illness and disability status.

The paper is divided into five sections. After the introduction, a section with a brief literature review on the effects of thermalism and the instruments adopted in the analysis is presented. Section 3 describes the statistical methodology applied and Sect. 4 shows the results. The papers end with Sect. 5.

2 Literature Review on Thermalism Effects and Measurement Instruments

2.1 *Thermalism Effects*

Systematic and integrative literature reviews found the literature agrees that thermalism brings benefits to pain relief and improves the quality of life (QoL) and the quality of sleep, highlighting the need to continue developing knowledge in a sector with boundless growth potential (Del Río-Rama et al., 2018; Ferreira et al., 2022; Rodrigues et al., 2022).

In particular, some studies can be referred to Quintela et al. (2020, 2023), being aware that wellness emerges as a critical lifestyle element and, therefore, health and wellness tourism is one of the most dynamic tourism sectors in Europe, study its importance in contributing to overcoming health concerns, both from the perspective of cure and prevention, supported by a continuous search to raise the levels of quality of life. Their results, in two European countries (Portugal and Hungary), show thermalism improves the quality of life of thermal spa visitors. Also recently, studies carried on by Vaz et al. (2023a, 2023b), applying the EUROHIS-QOL-8 and the EQ-5D-5L instruments to measure QoL in a thermal establishment in the north of Portugal, the Termas de Chaves the second-most significant thermal establishment regarding the number of users in the Portuguese economy, found that a statistically significant positive change was found concerning the thermal spa user's perception of quality of life, independently of the way it is measured.

Thermalism, as a particular case of thalassotherapy, is considered a medical approach known for thousands of years and has gained access to hospitals, medical clinics and the halls of some medical universities (Charlier & Chaineux, 2005). In particular, balneotherapy—called social thermalism in Mediterranean countries like France, Italy, Portugal and Spain because these countries believe it is a citizen's right to access the set of balneotherapy practices within the scope of social services—is included in some European healthcare systems (de Oliveira et al., 2023). Consequently, additional studies were developed that emphasised further health benefits, besides the overall perceived quality of life, such as the (perceived) quality of sleep or the improvements in illness and disability perception. Here will be mentioned just some of the more recent and comprehensive.

Literature review on specific diseases like osteoarthritis (OA) shows that thermal mineral water therapy can effectively reduce the pain experienced by patients with OA and improves their physical functions (Ma et al., 2021). The authors also found by revising published results that thermal mineral waters therapy can improve patients' QoL, evidenced by significant changes in the EQ-5D and HAQ scales. Moreover, they report that the literature refers that thermal mineral water therapy is a safe way to relieve pain and knee stiffness and improve joint function in such patients. Romay-Barrero et al. (2022) found improvements in aspects like pain, stiffness and functional capacity for adults with knee osteoarthritis after six months of thermal treatments. By applying the EQ-5D-5L scale, their results showed statistically significant differences

for pain and anxiety/depression. They refer that the absence of adverse effects and the ease of completing the treatment provided by the Spanish social thermalism system make this treatment feasible. Also, in a recent study by Maccarone et al. (2023), using a sample of patients with degenerative or post-surgery musculoskeletal disorders, it was concluded the water's mineral content appears to play a specific role in patients' response in terms of QoL, mood and pain perception. However, they call attention to the fact that positive effects on QoL and mood after rehabilitative interventions in the thermal environment should derive not only from the chemical and physical properties of the waters but also from the beneficial psychological role played by the thermal environment.

Although not so recent, it is possible to find studies on the effect of combined thermal treatments with traditional rehabilitation on cancer patients' QoL. Strauss-Blasche et al. (2005) found that combining inpatient rehabilitation with spa therapy provides a promising approach to breast cancer rehabilitation. Regarding sleep quality, Pereira et al. (2021), in their research to perceive the effect of thermal treatment on self-reported sleep quality using the SF-36v2 and Pittsburgh Index, found that, at the beginning of the treatment, study participants self-reported a satisfactory quality of life, especially in social functioning and emotional role performance. Finally, it is relevant to refer to the importance of thermal hydrotherapy in chronic skin diseases and dermatological conditions that affect quality of life. Nocera et al. (2020) present an overview of research made with Avène water. They mention hydrotherapy is effective as adjuvant management care, relieving subjective and physical symptoms with excellent tolerance and confirming QoL improvements in patients with chronic inflammatory dermatological diseases.

The previous brief literature review intends to present a summary of the state-of-the-art regarding the results found for the effects of thermalism on users' health and well-being. Still, as also mentioned, more research is needed to consolidate the results already found.

2.2 Measurement Instruments: Brief Presentation and Definition

This subsection presents the instruments used in the analysis and how they may be applied to fulfil the proposed objective. As mentioned above, two scales were applied to assess the quality of life before and after thermal treatments: the EQ-5D-5L and the EUROHIS-QOL-8 scales.

The EQ-5D scale that aims to assess and study the quality of life was developed by the EuroQol Group, in 1988, for use in economic evaluation (Ferreira et al., 2019). The scale allows the joining of two essential components of any health-related quality of life measure to be used in economic cost-utility evaluations: (i) a profile describing health status in terms of domains or dimensions and (ii) a numerical value associated with the health status previously described (Ferreira et al., 2013). The first version

of the EQ-5D scale covers five domains (mobility, self-care, usual activities, pain or discomfort and anxiety or depression), each with three levels (no problems, moderate problems or extreme problems), which gives a total of 243 unique health states from which it is possible to generate utility values to calculate the quality-adjusted life years (QALYs), a generic measure of disease burden, including both the quality and the quantity of life lived (Thompson & Turner, 2020). Due to concerns regarding the sensitivity of the EQ-5D-3L instrument to specific patient-relevant changes, a five-level version of the instrument was created by EuroQol Group in 2010. The five-level version—the so-called EQ-5D-5L quality of life scale—added two response levels and updated the mean response level with the term “moderate” from “some” in the EQ-5D-3L for the first three dimensions (Feng et al., 2021). The EQ-5D-5L is currently available in 130 languages and has been formally tested and validated for different populations.

For the Portuguese population, the scale validation has been made by Ferreira et al. (2019) and approved by the Portuguese regulatory agency (INFARMED) for reimbursement purposes when the EQ-5D-5L has been used as a measure of benefit. The validation study results “suggest that pain/discomfort and mobility are the most relevant EQ-5D dimensions according to the preferences of the general Portuguese population. Usual activities and anxiety/depression are the least relevant dimensions” (Ferreira et al., 2019, p. 3171). According to Portaria n°. 391/2019, of 30 October 2019, the legal document that approves the principles and characterisation of the Methodological Guidelines for Health Technology Economic Assessment Studies in Portugal, the EQ-5D-5L is the preferred instrument to assess health-related quality of life. If information is unavailable based on the EQ-5D-5L, other generic preference-based instruments may also be used, but their choice should be justified.

This work also applied, to evaluate the quality of life, the EUROHIS-QOL-8 scale—a quality of life index developed from the generic instruments WHOQOL-100 and WHOQOL-Bref (WHOQOL, 1993, 1994)—that includes social aspects that may determine one’s quality of life and are not captured by the EQ-5L-5D scale. The two scales, used together, may complement each other.

To define and assess the concept of quality of life (QoL), an international panel of experts appointed by the World Health Organisation (WHO), known as the World Health Organisation Quality of Life (WHOQOL) group, discussed this issue and defined quality of life as “an individual’s perception of his or her position in life, within the context of the culture and value systems in which he or she is embedded and concerning his or her goals, expectations, standards and concerns” (WHOQOL Group, 1994, p. 28). The definition of quality of life, proposed by the WHOQOL group, emphasises the importance of the individual’s perception of life. According to them, quality of life is related to the individual’s position, considering the cultural context and values present in the society in which they live. In addition, this perception involves each individual’s personal goals, expectations, standards and concerns. In short, quality of life is a subjective assessment of how a person feels about their life, considering cultural and personal aspects.

This EUROHIS-QOL-8 index, a shortened version of the previous WHOQOL indexes, assesses people's quality of life in eight domains: physical health, psychological health, social relationships, environment, living conditions, daily activity, social participation and overall well-being. The result is a comprehensive index calculated from the sum of the eight items, with a higher value corresponding to a better perception of quality of life. The scale was created to be used quickly and easily, allowing a comprehensive and comparative assessment of the quality of life. It has eight simple questions, answered on a scale of 1 to 5, where 1 represents "very dissatisfied" and 5 represents "very satisfied". Following the original recommendations, the results of the domains and, therefore, the overall result are transformed into a scale ranging from 0 to 100 (Pereira et al., 2011). The WHOQOL project was implemented in Portugal by the Portuguese Centre for the Assessment of Quality of Life, and the team of this centre validated the two generic versions of the instrument. The process of development, validation and application of these instruments in Portugal was reviewed in studies by Pereira and Canavarro (2015), Canavarro et al. (2006, 2010), Rijo et al. (2006) and Vaz Serra et al. (2006). The WHOQOL is available in over 40 languages and is widely used internationally as a quality of life assessment tool.

The BaSIQS scale was developed to measure and assess sleep quality, highlighting difficulties in sleep onset, sleep duration, sleep quality and sleep depth (Allen Gomes et al., 2015). It consists of a brief and specific 7-item scale that evaluates the nighttime experience regarding subjective sleep quality/insomnia symptoms, leaving aside other aspects of sleep such as duration, schedules, regularity, sleepiness and day-to-day obligations (Miller-Mendes et al., 2019). A five-point Likert scale ranging from 0 to 4 points is used to assess each of the 7 items of the BaSIQS scales, except the last two items, which are inverted. The items evaluate sleep onset, maintenance, early awakening, perceived depth and sleep quality. The total BaSIQS score is obtained by adding the individual items and can range from 0 to 28, with higher scores indicating poorer sleep quality (Gomes et al., 2011).

The Health Assessment Questionnaire-Disability Index (HAQ-DI) is designed to assess a person's level of disability and functional status. It is often used in clinical research and healthcare settings to evaluate the impact of various health conditions on a person's ability to perform daily activities. The HAQ-DI, translated and validated for the Portuguese population, consists of 20 questions covering eight areas of daily living, including dressing, lifting, eating, walking, hygiene, reaching, grasping and other daily activities. Each question asks the respondent to rate their difficulty performing specific tasks on a scale ranging from 0 (no difficulty at all) to 3 (unable to perform) (Pope, 2011). The questions included in this instrument refer to the performance of fine movements of the upper limbs, locomotor activities of the lower limbs and activities involving both the upper and lower extremities. The scores for each question/category are summed and averaged with a disability. Each question can be answered on a four-level scale ranging from 0 to 3. A higher score indicates a higher level of disability and functional impairment. Scores between 0 and 1 are generally considered a mild or moderate disability, between 1 and 2 a moderate to severe disability and between 2 and 3 a severe to a very severe disability (Bruce &

Fries, 2005). The HAQ-DI is a reliable and validated tool that can assess the impact of various health conditions, including rheumatoid arthritis, musculoskeletal disorders and other chronic diseases. It can help guide treatment decisions, evaluate disease progression and monitor the effectiveness of interventions or therapies.

Finally, to assess an individual's perception of their illness was adopted the Brief Illness Perception Questionnaire (BIPQ), a scale consisting of nine items which asks about different aspects of the illness experience and assesses several dimensions of illness perception, such as: (i) the perception of the cause of the illness, this is, how well the individual understands their illness and its symptoms; (ii) the perception of the consequences of the illness on different aspects of life, such as physical functioning, emotions and social life; (iii) the perception of the timeline of the illness, this is beliefs about the duration of the illness and the perception of the illness as something chronic or acute; (iv) the perceived curability of the illness, this is, beliefs about the effectiveness of medical treatments for the illness; (v) the perceived emotional impact of the illness, including fear and worry; (vi) the perceived control over illness; and (vii) the perceived understanding of the illness, like the causes and nature of the illness. The scale uses only eight questions representing each a different dimension of illness perception. A final question, the ninth, is an open-ended question in which the patient is asked to rank, in order of importance, the three leading causes they attribute to their illness appearing. All items are rated on a scale from 0 to 10, with higher values indicating a more negative perception of the illness (Broadbent et al., 2006).

3 Methodology, Capitalise the First Letter of Every Word in the Title

As abovementioned, this study seeks to evaluate thermalists' perception of their health and well-being status regarding the thermal user's self-perception of illness, quality of life, sleep quality and disability after receiving thermal treatments for 14 days. In particular, the study tries to find how the sociodemographic characteristics of thermal spa users may influence their self-perception. Demographic and economic features, which may include but are not limited to sex, age, marital status, family data, professional occupation, educational attainment and nationality, are essential to start defining and analysing a sample of data in social sciences (Quintela et al., 2023), mainly if the results may serve for developing marketing and development strategies that may benefit the users, the thermal establishments, the territory and all other stakeholders related with thermalism.

To achieve the aim defined, a survey was conducted among thermalists at Termas de Chaves (a thermal establishment located in the North of Portugal) between August and November 2021. The survey included a questionnaire to obtain information regarding the sociodemographic characteristics of thermalists and the set of five

instruments presented and described in the above section. The instruments EQ-5D-5L and EUROHIS-QOL-8 are to assess the QoL, the BaSIQS to assess the sleep self-perceived quality, the HAQ-DI to assess the thermalist level of disability and functional status, and the BIPQ to assess illness perception. The survey was applied before the thermalist starts treatments and 14 days after, at the end of the treatment period. The difference between the two periods was calculated for each scale to understand if the thermal treatment had any positive effect on the sample participants. The results were transformed into a dichotomic (dummy) variable where 1 indicates an improvement in QoL, sleep quality, illness perception and disability, and 0 indicates no improvement at all or a worse perception of health and well-being status.

A sample of 222 valid observations was compiled. However, after analysis, each particular instrument was necessary to withdraw some observations—the number of valid observations analysed for each instrument scale is presented in the results and discussion section. The statistical analysis included descriptive analysis to understand the distribution of sociodemographic characteristics and the sample's perceived changes after thermal treatments. The statistical student t-test for paired samples was applied to verify if there is statistical significance mean differences after thermal treatments regarding the value found before the treatment. A logistic regression analysis has been implemented to understand how each sociodemographic feature may influence the perceived change. The logistic regression makes it possible to understand the probability of each sociodemographic feature influencing a positive self-perceived change in QoL, sleep quality, illness perception and disability status.

4 Results and Discussion

Table 1 presents the absolute (number of participants—*n*) and relative distribution (percentage of participants—%) of sociodemographic characteristics in the sample of thermalists. The table also presents the number of valid observations collected for analysing each scale's results. Variables considered are sex, age group, marital status, academic qualification, labour situation and average income. Additionally, a variable is included to understand if the thermalist is a first-time user of thermal treatments or is already a usual thermal user.

The instrument that collected more valid answers was the EQ-5D-5L scale (222 observations). The responses fell to 216 for the EUROHIS-QOL-8, 206 for the BaSIQS, 200 for the BIPQ and 172 for the HAQ-DI.

The sample consists majority of female thermal users. Their number ranges between almost 66% (HAQ-DI) to 69% of the sample (EUROHIS-QOL-8). The age group of those 66 years or older is more significant, ranging between 61 and 67% of the total sample. The ones under 45 years old are almost residuals reaching the maximum of 5.5% of the sample for the EQ-5D-5L scale. Most of the sample is married or lives with another person (around 80 or more) of the total. Between 57 and 60% of the sample has just a basic formal education (no more than nine years

of formal school), and around 24% of all the participants have a higher education qualification. Only around 22–25% of the sample work (to themselves or others), and the remaining sample does not work (here are included housewives, students, and retired and unemployed participants). Most of the sample has a family average income between 667€ (the minimum salary in Portugal at the time) and 2000€ (around 66%/67% of the total). However, it should be noticed that around 20%/21% of the total sample indicates the family has an average income lower or equal to the minimum salary. Finally, most participants (between 60 and 64% of the sample) are not visiting the thermal establishment for the first time—they already used it in the past.

Table 2 presents the average values for each scale result before and after the thermal treatments. The table also presents the average differences found. Additionally, the student t-test for paired samples is presented to test if there is a significant statistical difference between the mean values seen before and after the thermal treatments. Cohen's *d*, which measures the size effects of thermal treatments, is also shown.

Remember that higher values for EQ-5D-5L and EUROHIS-QOL-8 scales indicate a better value for QoL, while higher values represent worse status for the other scales. Therefore it is easy to understand that the participants in the study report better quality of life, quality of sleep, lower disability and lower illness perception. The mean value after treatments is also statistically significantly different from the mean value found after treatment for each scale. Moreover, using the rule of thumb guidelines for Cohen's *d*, it is possible to conclude that participants report a large effect on the quality of life measured by the EQ-5L-5D (Cohen's *d* = 0.648) and on the self-perceived sleep quality (Cohen's *d* = 0.622). Cohen's *d* for other scales indicates medium effects on disability and illness perception.

The analysis of the results obtained by a scale regarding the sociodemographic characteristics starts in Table 3, where a simple absolute and relative distribution of improvement results by characteristic is presented.

Regarding the QoL, measured by the EQ-5D-5L instrument, all analysed categories report more cases indicating improvement than cases that feel the same or feeling worse. However, in relative terms, it is possible to conclude that women, the ones aged from 46 to 65 years old, that live alone have secondary education (12 years of formal education) and work, indicate an average family income equal to or lower to 665€ and visit for the first time the thermal establishment, indicate a relatively higher percentage of improvement cases. The QoL measured by EUROHIS-QOL-8 also shows that in all categories, more participants indicate improvements than the opposite. However, the results by characteristic are slightly different. With this instrument, the male until 45 years old, married or living with someone are the ones that relatively report more improvement in their QoL. For the other characteristics, the results are the same as for EQ-5D-5L. Regarding the self-perceived quality of sleep, are also the worker males aged until 45 years old, married or living with another person, with secondary education (or not formal education at all), with an income higher than 2000€ and visit the thermal establishment for the first time that reports relatively more cases of improvement. The profile for the ones that fairly report more improvements regarding illness perception is similar to the ones described

Table 1 Absolute and relative distribution of sociodemographic characteristics by scale

Variable	Category	Scales											
		EQ5DL		EUROHISQOL8		BaSIQS		BIPQ		HAQ-DI			
		(n)	%	(n)	%	(n)	%	(n)	%	(n)	%		
Sex	Male	69	31.1	67	31.0	65	31.6	66	33.0	59	34.3		
	Female	153	68.9	149	69.0	141	68.4	134	67.0	113	65.7		
	Total	222	100.0	216	100.0	206	100.0	200	100.0	172	100.0		
Age group	Until 45 years	12	5.5	11	5.2	11	5.4	8	4.1	6	3.6		
	From 46 to 65 years	72	33.2	72	34.1	67	33.2	65	33.0	50	29.6		
	66 years or more	133	61.3	128	60.7	124	61.4	124	62.9	113	66.9		
	Total	217	100.0	211	100.0	202	100.0	197	100.0	169	100.0		
Marital status	Coupled	173	80.5	172	81.5	161	80.5	156	80.4	138	83.6		
	Alone	42	19.5	39	18.5	39	19.5	38	19.6	27	16.4		
	Total	215	100.0	211	100.0	200	100.0	194	100.0	165	100.0		
Academic qualification	Without qualification	5	2.3	4	1.9	4	2.0	5	2.6	4	2.4		
	Basic education	124	56.9	121	56.8	115	56.9	114	58.2	101	60.1		
	Secondary education	36	16.5	36	16.9	36	17.8	30	15.3	23	13.7		
	Higher education	53	24.3	52	24.4	47	23.3	47	24.0	40	23.8		
Labour situation	Total	218	100.0	213	100.0	202	100.0	196	100.0	168	100.0		
	Worker	54	24.3	54	25.0	50	24.3	47	23.5	38	22.1		
	Other	168	75.7	162	75.0	156	75.7	153	76.5	134	77.9		

(continued)

Table 1 (continued)

Variable	Category	Scales											
		EQ5DL		EUROHISQOL8		BaSIQS		BIPQ		HAQ-DI			
		(n)	%	(n)	%	(n)	%	(n)	%	(n)	%		
Average income	Total	222	100.0	216	100.0	206	100.0	200	100.0	172	100.0		
	Until 665€	44	20.4	41	19.4	38	19.0	41	21.1	34	20.5		
	From 666€ to 2000€	145	67.1	144	68.2	136	68.0	128	66.0	109	65.7		
First time user	2001€ or more	27	12.5	26	12.3	26	13.0	25	12.9	23	13.9		
	Total	216	100.0	211	100.0	200	100.0	194	100.0	166	100.0		
	Yes	87	39.4	86	40.0	82	40.0	72	36.2	61	35.7		
Total	No	134	60.6	129	60.0	123	60.0	127	63.8	110	64.3		
	Total	221	100.0	215	100.0	205	100.0	199	100.0	171	100.0		

Source: Author's elaboration

Table 2 Distribution values obtained by scale, before and after the thermal treatments and respective student *t*-test for paired samples and the Cohen’s d indicator

Period	<i>n</i>	Mean	Standard deviation	Minimum	Maximum	Student t-test	Cohen’s d
<i>EQ-5D-5L</i>							
Before	222	0.795	0.192	−0.167	1.000		
After	222	0.895	0.127	0.195	1.000	9.658***	0.648
Difference	222	0.099	0.154	−2.666	0.867		
<i>EUROHISQOL8</i>							
Before	216	71.947	9.369	37.5	93.75		
After	216	74.942	8.423	37.5	96.875	5 019***	0.344
Difference	216	2.995	8.664	−28.125	28.125		
<i>EUROHISQOL8</i>							
Before	206	9.432	5.550	0.000	25.000		
After	206	7.451	4.571	0.000	25.000	−6.405***	−0.450
Difference	206	−1.981	4.429	−17.000	10.000		
<i>BASICS</i>							
Before	200	35.860	8.079	0.000	53.000		
After	200	30.530	8.647	3.000	51.000	−8.749***	−0.622
Difference	200	−5.330	8.655	−34.000	16.000		
<i>HAQ-DI</i>							
Before	172	0.382	0.479	0.000	2.500		
After	172	0.265	0.406	0.000	2.250	−4.027***	−0.310
Difference	172	−0.118	0.384	−2.125	0.875		

Note *** indicates a 1% significance level

Source Author’s elaboration

by the BaSIQS scale. Finally, concerning the disability perception measured by the HAQ-DI, the results present more absolute cases of participants that believe they are not better. The number of cases with a worse perceived disability is bigger than the ones who report improvements—however, the improvement’s results more than compensate, on average, the results of the ones that reported worse states.

Table 4 presents the logistic regression results to understand which sociodemographic characteristics have a higher probability of benefiting from the thermal treatments regarding the quality of life, sleep quality, illness and disability perception.

The results showed that regarding QoL and using the EQ-5D-5L scale, females are likely to improve 2.82 times more their quality of life after treatments. The participants aged between 46 and 65 and the ones older than 65 have a 2.6 and 2.5 bigger probability of improving, respectively. The ones living alone have a 3.67 times bigger possibility of improving QoL. More or less, the same value is presented by the ones with a secondary education (3.5 times more), followed by the ones with basic (2.18) and higher education (2.12 times more). Finally, the ones receiving the

Table 3 Distribution values obtained by scale, before and after the thermal treatments and respective Students *t*-test for paired samples and the Cohen's *d* indicator

Variable	Category	Improvement	Scales											
			EQ5DL		EUROHISQOL8		BaSIQS		BIPQ		HAQ-DI			
			(n)	%	(n)	%	(n)	%	(n)	%	(n)	%		
Sex	Male	Yes	44	28.0	42	62.7	40	61.5	48	72.7	23	39.0		
		No	25	38.5	25	37.3	25	38.5	18	27.3	36	61.0		
	Female	Yes	113	72.0	84	56.4	83	58.9	101	75.4	48	42.5		
		No	40	61.5	65	43.6	58	41.1	33	24.6	65	57.5		
Age group	Until 45 years	Yes	7	58.3	8	72.7	9	81.8	7	87.5	1	16.7		
		No	5	41.7	3	27.3	2	18.2	1	12.5	5	83.3		
	From 46 to 65 years	Yes	52	72.2	44	61.1	41	61.2	51	78.5	18	36.0		
		No	20	27.8	28	38.9	26	38.8	14	21.5	32	64.0		
	66 years or more	Yes	95	71.4	72	56.3	70	56.5	88	71.0	51	45.1		
		No	38	28.6	56	43.7	54	43.5	36	29.0	62	54.9		
Marital status	Coupled	Yes	118	68.2	100	58.1	94	58.4	118	75.6	54	39.1		
		No	55	31.8	72	41.9	67	41.6	38	24.4	84	60.9		
	Alone	Yes	33	78.6	22	56.4	23	59.0	27	71.1	13	48.1		
		No	9	21.4	17	43.6	16	41.0	11	28.9	14	51.9		
Academic qualification	Without qualification	Yes	4	80.0	4	100.0	3	75.0	4	80.0	3	75.0		
		No	1	20.0	0	0.0	1	25.0	1	20.0	1	25.0		
	Basic education	Yes	85	68.5	65	53.7	63	54.8	84	73.7	49	48.5		
No		39	31.5	56	46.3	52	45.2	30	26.3	52	51.5			
	Secondary education	Yes	28	77.8	25	69.4	25	69.4	20	66.7	5	21.7		

(continued)

Table 3 (continued)

Variable	Category	Improvement	Scales											
			EQ5DL		EUROHISQOL8		BaSIQS		BIPQ		HAQ-DI			
			(n)	%	(n)	%	(n)	%	(n)	%	(n)	%		
		No	8	22.2	11	30.6	11	30.6	10	33.3	18	78.3		
	Higher education	Yes	36	67.9	31	59.6	29	61.7	39	83.0	13	32.5		
		No	17	32.1	21	40.4	18	38.3	8	17.0	27	67.5		
	Worker	Yes	40	74.1	32	59.3	33	66.0	41	87.2	10	26.3		
		No	14	25.9	22	40.7	17	34.0	6	12.8	28	73.7		
	Other	Yes	117	69.6	94	58.0	90	57.7	108	70.6	61	45.5		
		No	51	30.4	68	42.0	66	42.3	45	29.4	73	54.5		
	Until 665€	Yes	32	72.7	28	68.3	20	52.6	29	70.7	17	50.0		
		No	12	27.3	13	31.7	18	47.4	12	29.3	17	50.0		
	From 666€ to 2000€	Yes	101	69.7	82	56.9	81	59.6	96	75.0	43	39.4		
		No	44	30.3	62	43.1	55	40.4	32	25.0	66	60.6		
	2001€ or more	Yes	19	70.4	15	57.7	18	69.2	19	76.0	9	39.1		
		No	8	29.6	11	42.3	8	30.8	6	24.0	14	60.9		
	First time user	Yes	63	72.4	57	66.3	54	65.9	56	77.8	27	44.2		
		No	24	27.6	29	33.7	28	34.1	16	22.2	34	55.7		
	No	Yes	93	69.4	68	52.7	69	56.1	92	72.4	43	39.1		
		No	41	30.6	61	47.3	54	43.9	35	27.6	67	60.9		

Source: Author's elaboration

Table 4 Logistic regression analysis results by scale

Variable	Category	EQ5DL			EUROHISQOL8			BaSIQS			BIPQ			HAQ-DI		
		n	Odd ratio	Wald test	n	Odd ratio	Wald test	n	Odd ratio	Wald test	n	Odd ratio	Wald test	n	Odd ratio	Wald test
Sex	Male	222	1.76**	5.09**	216	1.68**	4.22**	206	1.60*	3.40*	200	2.67***	12.59***	172	0.64*	2.82*
	Female	222	2.82***	31.86***	216	1.29	2.41	206	1.43**	4.39**	200	3.06***	31.12***	172	0.74	2.54
Age group	Until 45 years	217	1.40	0.33	211	2.67	2.10	202	4.50*	3.7*	197	7.00*	3.31*	169	0.20	2.16
	From 46 to 65 years	217	2.60***	13.19***	211	1.57*	3.50*	202	1.58*	3.30*	197	3.64***	18.36***	169	0.57*	3.81*
	66 years or more	217	2.50***	22.79***	211	1.29	1.99	202	1.30	2.05	197	2.44***	20.41***	169	0.82	1.07
Marital status	Coupled	215	2.15***	21.86***	211	1.39**	4.52	200	1.4**	4.48**	194	3.11***	36.90***	165	0.64***	6.42**
	Alone	215	3.67***	11.94***	211	1.29	0.64	200	1.44	1.24	194	2.46**	6.30**	165	0.93	0.04
Academic qualification	Without qualification	218	4.00	1.54	213	-	-	202	3.00	0.91	196	4.00	1.54	168	3.00	0.91
	Basic education	218	2.18***	16.23***	213	1.16	0.67	202	1.21	1.05	196	2.80***	23.43***	168	0.94	0.09
	Secondary education	218	3.50***	9.77***	213	2.27**	5.15**	202	2.27**	5.15**	196	2.00*	3.20*	168	0.27**	6.42**
	Higher education	218	2.12**	6.50**	213	1.48	1.90	202	1.61	2.53	196	4.88***	16.66***	168	0.48**	4.69**
Labour status	Worker	222	2.86***	11.43***	216	1.46	1.83	206	1.94**	4.94**	200	1.94**	19.33***	172	0.36***	7.81**
	Other	222	2.29***	24.49***	216	1.38**	4.14**	206	1.36*	3.66*	200	1.36*	24.35***	172	0.84	1.07
Average income	Until 665€	216	2.67***	8.40***	211	2.15**	5.23	200	1.11	0.11	194	1.11	6.61**	166	1.00	0.00

(continued)

Table 4 (continued)

Variable	Category	EQ5DL			EUROHISQOL8			BaSIQS			BIPQ			HAQ-DI		
		n	Odd ratio	Wald test	n	Odd ratio	Wald test	n	Odd ratio	Wald test	n	Odd ratio	Wald test	n	Odd ratio	Wald test
	From 666€ to 2000€	216	2.30***	21.16***	211	1.32*	2.76*	200	1.47**	4.91**	194	1.47**	28.97***	166	0.65**	4.78**
	2001€ or more	216	2.38**	4.21**	211	1.36	0.61	200	2.25*	3.64*	194	2.25*	6.06**	166	0.64	1.07
First time user	Yes	221	2.63***	16.19***	215	1.97***	8.78***	205	1.93***	7.95**	199	1.93***	19.53***	171	0.79	0.80

Notes: *** indicates a 1% significance level, ** indicates 5% significance level, and * indicates 10% significance level

Source: Author's elaboration

minimum Portuguese salary have 2.67 times more probability of improving. The same value is presented by the ones doing thermal treatments for the first time. The results for the QoL measured by the EUROHIS-QOL-8 do not present so “dramatic” probabilities of change. Several variable categories do not present any statistical significance, and among the statistically significant ones should be noticed that males seem to improve their QoL more likely. They have 1.68 times more probability of improving this perceived status. The ones not living alone, aged between 46 and 65 years and with secondary education and an average family income lower than 665€ also improve their quality of life more likely. Again the ones visiting the thermal spa for the first time are more likely to improve QoL—almost two times more.

Regarding sleep perceived quality, younger (until 45) married men with secondary education, with an income higher than 2000€ and who are still working present higher probabilities of improving their perceived sleep condition. The results are different concerning illness perception. Again, women aged 45–65 years, married or living with someone, with a higher education level, working, and an average monthly income bigger than 2000€ show higher probabilities of improving their illness perception. Concerning disability perception, most results are not statistically significant, calling attention to the need to gather more statistical information and that sociodemographic results are not so important to describe the thermal treatment effects.

5 Conclusion

As presented in the literature review, this study shows a statistically significant effect of thermal treatments on the thermalists' self-perceived quality of life, sleep quality, illness and disability perception. After thermal treatments, the participants indicate better scale values, on average, even if some heterogeneity in results can be observed. Regarding sociodemographic characteristics, it is also possible to conclude that socio-economic features may affect the perception of thermal treatment effects differently. Women are more likely to report positive changes (improvements in self-reported health and well-being). It is also possible to understand that it is not the older ones that show bigger probabilities of improving their perceived health and well-being states—the most significant improvements seem to be found in the middle ages. Having some degree of secondary or higher education, as active participation in the labour market, also appears to be important. To conclude, it should be noted that first-time participants in thermal treatment seem to present higher improvement levels more likely.

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