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An International Multidisciplinary Journal of Tourism

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The results of the financial analysis for the years 2007–2014 show that total Assets and Liabilities have decreased over the eight years of study. Revenues declined to 70% and Operating results to 45%. Return on Equity and Return on Assets declined rapidly, up to -60% and -11.60% respectively, and Liquidity ratios have worsened in 2014 (between -40% to -70%). The Net Profit in 2007 turned rapidly in the following years, to Net Losses, up to -33,95%, which were constrained in 2012, 2013, and even more in 2014 (-0.45%), while Interest expenses increased to 260% by 2014.

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The absence of specific case studies represents a limit of the present paper. Hence, with a view to a subsequent future research, we will continue the proposed analysis by enriching it with empirical evidence, which will be useful to foster the debate on the subject matter and for the related entrepreneurial and management implications.

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JOURNAL AIMS AND SCOPE

NOTES FOR CONTRIBUTORS

EDITORIAL

The issue comprises eight (8) papers on various aspects of tourism. In the first paper Ibrahim Ramadani Ferim Gashi, Etnike Dibrani and Dardan Hoti examine the regional and institutional opportunities for cross-border cooperation, networking and tourism development at the Albania-Kosovo border. The study indicates that cross border cooperation enables the exchange of experiences and ideas and leads to the economic prosperity of the involved areas. Lastly, the study proposes the development of a tourist zone called "Green Albania" between the two countries. Then in the second paper of Wann-Yih Wu & Huan Minh Nguyen presents the relationship between the antecedents and consequences of tourist satisfaction by using a meta-analysis approach. The research results confirms that the antecedents have a significant impact on tourists' pre-travel satisfaction which in turn impacts their loyalty. In the third paper Bashar Maaiah, Omar Abedalla Alananzeh, Abdallah al-shorman and Mohammad Al-Badarne examines the relationship between augmented reality (AR) as a technological tool, mobile and touristic attraction. Qualitative methods were employed and the results indicate that modern technology enhances the touristic experience and makes it more enjoyable.

In the fourth paper, Odunga Pius, Manyara Geoffrey and Atieno Lucy suggested that visitors satisfaction is an important factor for the sustainable tourism development of a destination as it affects visitor expenditure patterns. For the research quantitative techniques were employed and Rwanda was used as a case study. Then Mihail N. Diakomihalis & Georgia Ch. Papadopoulou analyze the tendencies of the cruise sector in Greece during the years of the economic crisis. The Cypriot cruise company Celestyal Cruises was used as a case study and the research results showed that the total assets and liabilities decreased during the crisis. The sixth paper of Stavros Hatzimarinakis and Peter Hackl summarizes the main results of the first Tourism Satellite Accounts (TSA) pilot project that was developed in Greece.

The study includes and defines the total expenditures of inbound, domestic, outbound and internal tourism.

Subsequently, Marco Valeri & Leslie Fadlon conducted a research to verify whether the nature of the relationship between a tourist destination and tourist enterprises can be defined as co-evolutionary. In the last paper Vicky Katsoni & Androniki Kavoura examine the structure of the tourism information channels and networks that were used to promote religious tourism in the prefecture of Arcadia, in Peloponnese, Greece. Quantitative research was employed and revealed that the existence of information networks in the area was limited and religious tourists used word of mouth and recommendations from friends and relatives as information sources.

SPATIAL-FUNCTIONAL DEVELOPMENT OF THE BORDER ZONE PRIZREN-KUKËS (Kosovo-Albania)

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This paper examines the regional and institutional opportunities for cross-border cooperation, networking and tourism development at the Albania-Kosovo border, which is one of the internal borders of the Albanian ethnic territory. Completion of the study confirms the hypothesis that closure of states within the classical boundaries causes obstacles, not only for the development of cross-border tourism, especially when viewed from the perspective of sustainable tourism development in this region. While, on the



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*other hand, cross border cooperation enables exchanges of experiences , Ideas between communities, etc., and all this reflects on the economic prosperity of these areas. In the process of developing the countries of southern Europe, particular importance has been paid to settlements and infrastructure away from border areas, while border regions have remained underdeveloped and without prospects. Development has been challenged in many border areas, including all Balkan states, while these areas were abolished as a result of the population's departure. The idea in this case study, aims to "create" the unique tourist zone "**Green Albania**" between the two countries, with its unique natural characteristics, leading to economic, cultural and national integration, as well as preservation and advancing the natural and cultural values of the cross-border territory.*

Keywords: area, green corridor, border, tourism, design, functionalization.

INTRODUCTION

From many sociological studies it has been proved that the integration of communities and regions is a necessity of socio-economic development (Stewart 1996). The market, information revolution, traffic and tourism represent the basic elements of globalization as a dominant and objective feature of time, despite the adversarial and regional factors. They are important components of development, with complex economic, social and ecological impacts. According to the globalists more than 60% of the world today is considered globalized (interdependent interlocutor) and subject to its legalities (Draçi 2008). So one without the other would not work.

The purpose of this paper is firstly to scrutinize the regional, political and institutional foundations of cross-border cooperation and tourism development In the context of the two countries of Southeast Europe: Kosovo-Albania border, especially since the two countries were liberated from the concepts of unsustainable governance; Albania from communism and Kosovo from the classic Serbian occupation in 1999, meanwhile the rise of cross-border circulation also began. The two governments immediately began cross-border

cooperation, which enabled the development of coastal tourism as mountain tourism in border areas.

Cross-border cooperation in border regions is one of the most popular subjects in border research. Increased discussion of national borders and their significance has followed upon the remarkable geopolitical changes that have taken place in last two decades (Houtum 2000).

Except the wide interest in the problems of state borders in political geography, state borders have not gained much attention in the literature of tourism. The theoretical and conceptual foundation for such research relies much on the works of Timothy (1999, 2001; Timothy & Teye 2004; Houtum 2000), who has been studying the relationship between tourism and borders from various perspectives, including cross-border cooperation and planning in border regions. The relationship between national borders and tourism development is complex, for borders manifest themselves in tourism and influence it in many ways. A physical border can form a barrier to tourism flows, or it can be crossed almost unnoticed. Border permeability, the barrier effects caused by the border such as regulations for the movement of people and goods, will directly influence tourism flows and the development and distribution of tourism infrastructures in a border region. Border permeability, political situations and socio-cultural cohesion also affect to the potential emergence of cross-border partnership and development (Timothy 1999, 2001). As national borders are lines of transit between political, economic and often socio-cultural entities, i.e. nation-states, it has become almost a cliché to speak of border regions as 'laboratories' where one can examine how global and supranational processes transform these structures. The issue of cross-border tourism development and cross-border regional cooperation has been updated especially in recent years. This topic was dealt with by some authors in various journals. (Anderson 1996; Leimgruber 1998; Allmendinger & Haughton 2009; Hartman 2006; Ioannides et al. 2006; Prokkola 2007). The themes of

these published articles promote cooperation between peoples and communities, the construction of cross-border tourist areas and regional development, which is in harmony with the concepts of European Union development (Chang 2001; Jensen & Richardson 2004; Paasi 2008). Crossborder cooperation is manifested in linkages between tourism organizations and the authorities, in dispersed politico-economic practices, in relations between public and private organizations and actors and in global-local interconnectedness and networking. In this case, crossborder cooperation will be developed and manifested in linkages between tourism organizations and the authorities, in dispersed politico-economic practices, in relations between public and private organizations and actors and in global-local interconnectedness and networking (Jamal & Getz 1995). These dividing lines have already become important areas of peoples' integration and a source of development (O'Dowd 2003).

Many border areas now have become attractive to visitors because they want to experience the nature and cultural traditions between different countries. Related to this issue, the author Dallen J. Timothy gives some examples:

“For some people, political boundaries invoke a unique type of fascination. Some tourist attractions have even been developed simply because they are a border, such as the Four Corners Monument in the United States, where Colorado, Utah, Arizona and New Mexico meet. The Navajo Nation has begun capitalising on this notion by charging an entry fee into the monument and establishing souvenir stands and food vendors. Dozens of other examples exist where frontier markers have become significant objects of tourist attention, such as the border gate between Macau and China, an interesting monument at the point where Finland, Norway and Sweden meet, and the Peace Arch, which straddles the border between the United States and Canada in Washington and British Columbia” (Timothy D. J. 2000).

Many of the world's border areas which were once an artificial barrier, strictly forbidden, and taboo topics for peoples, have now

become attractive and popular places for millions of visitors that bring great social, cultural, and economic benefits. Related to this issue, the author Dallen J. Timothy gives some examples:

“Several relict boundaries, or former boundaries that no longer function in their original political capacity but are still visible in the cultural landscape, have also become significant attractions. Probably the most well-known example of this is the Great Wall of China, which was built as a fortification between China and Mongolia between 246 and 209 BC. The wall is one of China’s most important tourist attractions, and few visitors to Beijing leave the area without having spent a day there. Hadrian’s Wall is another example of an ancient relict boundary that has become a major tourist attraction. The wall, which is considered to be the finest vestige of Roman rule in Britain, was designated a UNESCO World Heritage Site in 1987, and much work has recently been done to map, delimit, manage and conserve the site. A more recent example is the Berlin Wall. Soon after its demise in 1989, the wall became the focus of strenuous preservation efforts. While its downfall was a welcome event on both sides of the border, preservation enthusiasts immediately recognized the need to save the structure in some form for heritage purposes; to tell the story of the rise and fall of the Eastern regime.

However, some hostile and less-crossable borders also function as primary attractions. The DMZ between North and South Korea and the former Berlin Wall are just two examples. These borderlines, which are/were arduous to cross, are/were popular attractions for southern and western tourists respectively. The rain forests adjacent to the Democratic Republic of Congo-Uganda and Costa Rica-Panama borders, for example, are recognised globally as some of the best ecotour regions in the world” (Timothy D. J. 2000).

Most of the visitors, borders areas experience emotionally. Below we present the experiences and the words of some tourists who visited different border areas in the world:

“In the words of one traveller, I love border crossings. They somehow make me feel as though I’m in a black-and-white movie with subtitles”. Another commentator reminisces as follows: Borders have fascinated me since childhood. As a kid, I used to imagine border landscapes: dark rivers, watchtowers, and unknown lands lying beyond them...Over the years, as I started travelling, borders have been somewhat demystified, but now again, approaching the Finnish-Russian boundary, I was feeling that boyish excitement, an anticipation of mystery”.

“In a subtle and totally subjective way, each side of the border feels different; in the space of a few feet we pass from one geographical entity to another which looks exactly the same but is unique, has a different name, is in many ways a completely separate world from the one we just left...this sense of passing from one world to another, of encompassing within a few steps two realms of experience, enchants and fascinates” (Harris 1997, Medvedev 1999, Ryden’s 1993, according to the author Timothy D. J. (2000).

So, based on this experience we can conclude that border areas now no longer present development barriers, but they become an integrating space of peoples and communities that bring prosperity.

The idea in this case study, aims to "create" the unique tourist zone "**Green Albania**" between the two countries, with its unique natural characteristics, leading to economic, cultural and national integration, as well as preservation and advancing the natural and cultural values of the cross-border territory.

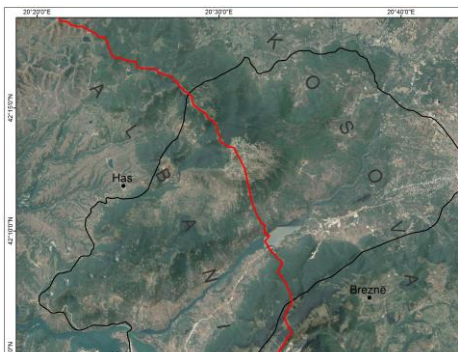
MATERIALS, METHODS AND STUDY AREA

Looking at the geographic and architectural elements, of the Kosovo-Albania border area, and its natural attractiveness; the imagination and the initiative for the formation and promotion of a common territorial tourist as well as recreational and cultural space; for the population of these areas, on one hand there are many values and socio- economic benefits. On the other hand, the values of

sustainability of the natural environment, especially the conservation of attractive natural facilities, as well as the conservation of rare biodiversity are immense. This territory along with the border-line, would turn into a gravitational area, which would attract tourists and many investors who, with their economic potentials, would create a favorite and pleasant cross-border environment between the two countries through numerous tourist services, but also enjoyment of nature attractions. The architectural design process of such areas requires a special commitment of the knowledge and presentation of the existing situation (natural environment, human resources, infrastructure, economic and social links throughout the border), not to overlook the spirit and the artistic taste of national values through historical focus, as a potential tourist and cultural design concept. These two design concepts (natural and social) would stimulate movements of the Albanian population from all over, towards this area, because of the need for inter-religious meetings and communication, but also from the desire to experience a comfortable recreational, healthy and cultural environment. This form of organization will also lead to the elimination of the classic boundaries and the modernization of the nations.

The "Green Corridor" area is a peripheral part of the southwestern part of Kosovo and northeast of Albania. It is a cross-border area between Prizren and Kukës, with a total area of 43.821 hectares, with the share of, Kosovo being 22.523 hectares, while the part of Albania is 21.298 hectares. This area of the Green Corridor from the aspect of the geographical position is a tectonic relief form found towards Vermica, in the flow of the Drini i Bardhe River, which is distinguished as a morphological part with particular physical-geographic elements. Geology of the terrain consists of the rock layers of the period of the Tertiary, while the most recent deposits cover the bottom of the basin and the main river valley (Drini Bardhë). The highest peak of this area is Pashtrik peak at 1986 m, while the lowest point is Vermica with 275 meters of altitude (MMPH

2010). The main model of the relief of this area is the flow of the Drini i Bardhe River, which through the river erosion has created the spectacular canyon (Drini Bardhe Canyon), which adds even more importance and beauty to the landscape of this area. An important place in the hydrography of this area is also, many springs that are characterized by a small water flow. The Green Corridor is under the influence of the Mediterranean paramount and mountainous climate, and is quite suitable for economic, social and tourist development, especially in the development of winter sports. The transition from Mediterranean to mountainous climate enables the distribution of precipitation, quantity and change of precipitation, the expansion of snow layer, wind and solar radiation, etc.



Map 1. *The geographic position of the project zone*



For the purpose of this work, a wide range of literature, including books, journals, reports, aerial photography, and spatial plans, tourism projects in the Municipality of Prizren and Kukes and web resources were considered. The methods used in this paper are, statistical methods, GIS methods, comparative methods, graphical methods, information methods and field analysis. Statistical methods have been used to collect and analyze statistical sources by different

entities, which are then processed and yielded valuable results. GIS method was used to compile maps attached to the text for which certain GIS software was used. In addition, the graphical method presents the territorial development plans of the Prizren-Kukës area. Finally, the method of information and analysis has to do with field visit, collection of various information and analysis of certain territorial occurrences.

RESULTS AND DISCUSSION

The project idea, in this case, aims to "form" a separate "Green Albania Tourist Area" between the two countries. With the special natural features it possesses, leading to economic, cultural and national integration and conservation it leads the natural and cultural values of the territory in question. Given the diversity heterogeneity and the rich biodiversity of flora and fauna, the project concept aims at preserving, revitalizing and rational use of this geographic area.

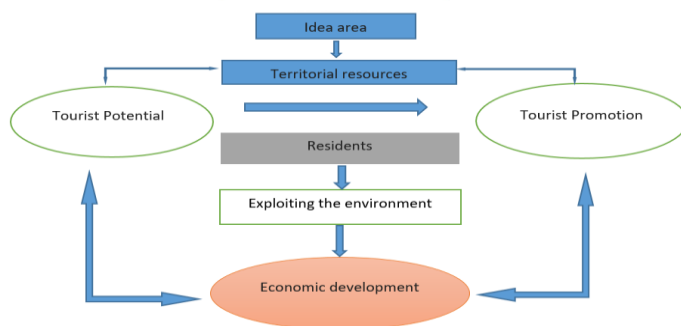
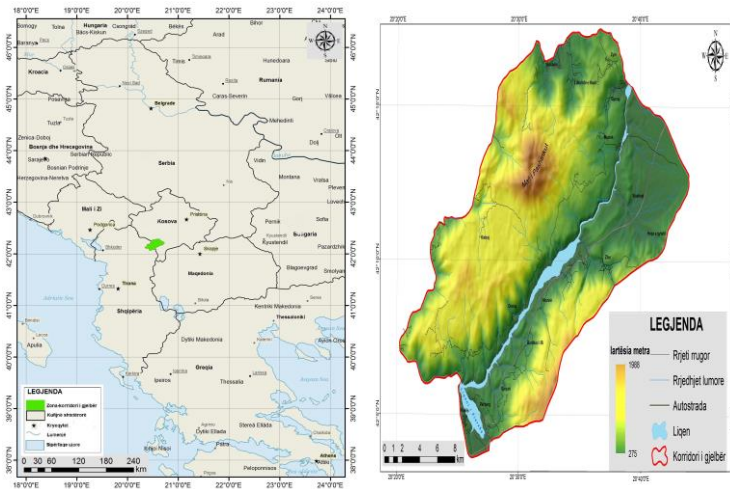


Fig 1. *Schematic presentation of territorial development from existing resources*¹

¹ Spatial Planning for sport guidance on se aspiration and experience", England 2005,

The idea, or application of the idea, would include all the functional details of suitability and scope for the broader recreational development and development promotion in its direction. Hence, while the realization of this idea would be in full harmony with the guidance given in cooperation by two ministries².



Map 2. Geographical position of the Green Corridor

Map 3. The Green Corridor microposition

The aim of the project is to achieve a satisfactory level of economic development of the territory through existing tourism and human resources such as:

² Konkurs ‘Profesionistët e rinj për zhvillimin ndërkufitar’ Kosovë – Shqipëri.

- Promotion of tourist resources;
- Investments to increase the sustainability of the natural environment by treating those sites with high natural attractiveness and high sensitivity, such as those with rare biodiversity, as well as promoting cultural sites;
- Infrastructure investments, creating business centers, parks, separate services, innovations, etc;
- Ensure a proper level of access and connectivity of this area with other regions and units within the area for the purpose of economic and social development³.

To develop the Green Corridor area, according to our perception the easiest, fastest and best way is to valorize the tourism potential of the territory on both sides of the border, between Prizren and Kukës municipalities that blend two states with the same genesis and culture.

Project interventions, with theoretical research, are the basic part that send us to the application of the concept in choosing the easiest, fastest and most appropriate form for the conservation, exploitation and development of tourist resources of this area. Interventions, based on the conceptual concept of the project, may be:

- political,
- economic,
- ecological,
- tourism promotion.
- Political- drafting of interstate policies for the cooperation and management of the border area.
- Economic - economic intervention implies the application of appropriate measures, for improving the infrastructure, improving living standards for the population of the area, and beyond, reduction of unemployment in the tourist

³ Bashkia e Kukësit, “*Strategjia e Zhvillimit rajonal të Kukësit 2012 - 2016*”, Qershor 2012, Kukës.

season, innovative and cultural activities, improving and building tourist resources in educational, health and recreational form, as well as the rational management of nature by the inhabitants of the area.

- Ecological - conservation of nature and its rational utilization.
- Tourism promotion, presents the marketing of bids and tourist functions, such as appearing within this area. The tourism offer includes natural and cultural values, with recreational, health, cultural, entertainment, political, social and economic functions.

All of these brand interventions conceptualize a strong bond with each other, because each one precedes the development of the other. Sustainable development envisages strong tourist propaganda, through joint management, tourist offices and regional media. The best regional promotion includes a wide range of activities that would determine the flow, **spatial reorganization and economic effects of tourist**, local, regional and continental mass consumption (Gashi 1986).

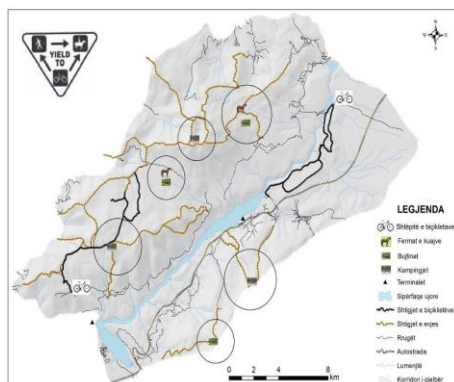
During field work and requests for wider information from the Municipality of Kukës and Prizren, potential locations for the following points have been identified:

- The route of the old road (pedestrian / horses / bicycles, as well as the itinerary of boat riding was determined;
- The areas where hostels/ restaurants can be developed;
- The position of the passenger terminal;
- Rented bicycle houses, which can be located in the centers of Kukës/ Vermica or along the itinerary;
- Positioning of farms; minimum two farms, one in the territory of Albania and one in the territory of Kosovo, which may be part of the hostel's accommodation.

The itinerary is conceptualized as a return to the past, in order to experience the historical journey from the distant past such as:

- Regulation of the dock location of the boat for tourist drives, minimum two docks (one in the territory of Albania, one in the territory of Kosovo);
- Regulation of camping and picnic areas;
- Regulation of areas for afforestation along the road;
- Regulation of picnic areas along the street, their urban furnishing, i.e. benches, tents, panoramic or observation points, etc., as well as their illumination;
- Evidence of natural and heritage attractions;
- Determining the paths of walking in nature or climbing on the mountain;
- Equip the road with the necessary signaling.

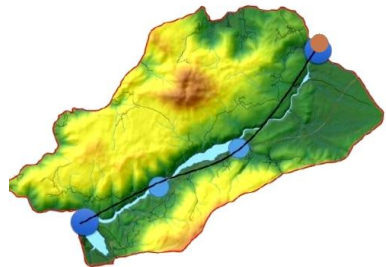
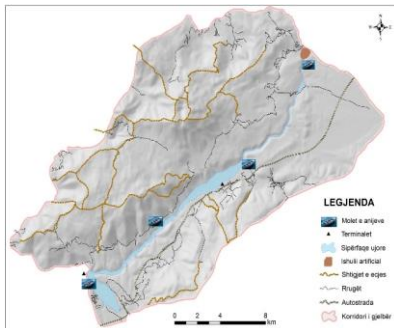
These points represent the basis of health, cultural and recreational activities of the area projectile. The Green Corridor would start with free hiking trails, which include the spacious, beautiful natural landscape. Tourists can then choose to ride, since the trails have a length of 111 km. They can be equipped with nearby farm horses, to continue the recreation along the rides. Mountain biking can take place in a special mountain park foreseen for this purpose only. Visitors can be equipped with one hour and hourly bicycles from the supply points.



Map 4. The schematic representation of the interconnection of tourist gravitational activities

This park, besides the free cycling experience, can also serve for certain competitions. Along all these paths the relief has a marked slope, which possesses a risk to tourists, but also a real attraction, in addition protective panels should be placed in some spots.

All these activities will be equipped with information tools, such as information boards, maps, plans, etc. The Green Corridor has the potential to develop a variety of tourist activities as other forms of experiencing natural values. Sailing along the Drini i Bardhë River is a special form of experience. The whole area can be experienced by cruise ships that are located along the docks. Docks connect land masses on both sides of the river, connecting Prizren with Kukes.



Map 5. Schematic presentation of the interconnection of educational and touristic activities

Map 6. The connection of docks

The first dock appears at the beginning of the entrance to the concept area (Drini i Bardhë canyon), namely to the improvised 'artificial island'. A view that can be experienced during a break in the

existing restaurants. Then it continues with the other docks in Lake Vërmicë and Lake Fierza, where it ends in the center of Kukes.



Fig. 2. Hunting in the Pashtriku Mountains

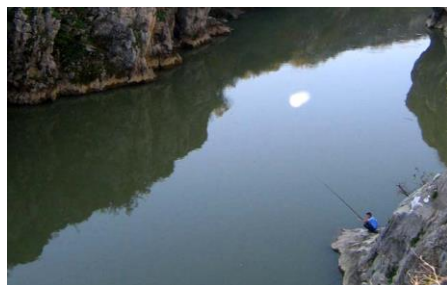


Fig. 3. Fishing in the White Drin

On the basis of the general analysis, we consider, that this area presents many other forms of recreational and educational activities that compare it with neighboring and regional countries as a desirable place to visit, with some of the following activities:

- **The natural amphitheater.** An improvised amphitheater under the motive of nature in the border area for the purpose of education, sports, recreation etc., where numerous cultural activities such as festivals, cinemas, paintings, theatrical performances etc. would be held.
- **Windmills,** which would serve to lighten pedestrian paths, cycling etc. Additionally, these facilities would play the educational role to schools, as well as a way of energy-saving from nature, or from regenerative resources.
- **Aeronautism.** Vertically heterogeneous terrain, which is Pashtriku's peak, 1988 meters high down to 275 meters Drini i Bardhë river, meets the technical conditions for practicing this activity.

- **Diving** on improvised beaches along the Drini Bardhë River and Fierza Lake (artificial beaches in Vërmicë and Kukës).
- **The creation of an improvised area serving as a sanctuary for animals**, an area that can show the recognition and love of wildlife such as: Common deer (*Cervus elaphus* L.), Deer Lobster (Lady L), Squirrel (*Lepus europaeus* Pall), Wild goat - (*Ripicarpa rupicapra* L), Wild goat - (*Sus scrofa* L), Jackal (*Canis aureus* L), Wild cat (*Felis silvestris* Schr), Big wild chicken (*Tetrao urogallus* L), Fox (*Vulpes vulpes* L)), etc.
- **Fishing** in Drini i Bardhe, is not as a desirable activity, but setting up special areas for the accumulation and cultivation of carp, trout and others, would create a fishing industry.
- **Hunting**. It is very limited and is done with special criteria.
- **Establishment of a traditional trade facility**, designed under Albanian cultural motivation, with a view to promoting culture (clothing, traditions, customs) and Albanian gastronomy.

CONCLUSIONS

The decade that we are living in, will be remembered as decades in which tourism has emerged as one of the most promising sectors and important human activity, contributing to economic growth and better life. (T. Rifai)

From what we have found, we can conclude that this area offers natural and cultural tourism resources with many educational, recreational and other effects. Furthermore, it offers holidays and excursions that can be developed at different seasonal periods, dominating the spring and summer season, and less during autumn and winter.

In addition, this would reflect on a new form of cooperation between countries, systems and different levels of governance through these actions:

- A commitment to contribute to a higher degree of economic performance, and in particular the growth of well-being;

- A commitment to reviewing and harmonizing administrative regulations that are in conflict with the vision of this strategy;
- A call to central governments, which are responsible for various aspects within this strategy, to harmonize their policies and practices with this strategy and to accept the call to engage in regional partnership;
- A call to donor organizations to support this vision and strategy, and to identify the specific actions that they would support.

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THE ANTECEDENTS AND CONSEQUENCES OF TRAVEL SATISFACTION: A META-ANALYSIS STUDY

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Extant literature has yet to determine the relationship between the antecedents and consequences of tourist satisfaction. Therefore, this study tries to present the relationship through meta-analysis approach. Based on 33 studies synthesized and a proposed research model with 13 hypotheses, results have showed that the antecedents have a significant impact on the pre-travel satisfaction of the tourists and their satisfaction will consequently have a positive effect on their loyalty later on. These findings have implications for the management and marketing of the destination image.

Keywords: *Travel Satisfaction; Meta-analysis; Quantitative.*

INTRODUCTION

Feeling customer satisfaction is of great significance for the tourism industry because it impacts the economy in their future

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(Petrick, 2003). If the customers feel satisfied, trust and confidence can be built. Moreover, they tend to share their positive experience with others (word of mouth), which leads to a repeat use of service.(Kozak and Rimmington 2000. The satisfaction of tourists with a trip is based on several aspects, such as their perception of the destination image (affect image, cognitive image) as well as their expectations before and during the trip (Ramkissoon et al., 2011 and Yoon and Uysal, 2005). Many previous studies have demonstrated that the comments of visitors on a destination image play an important role in the choice of destination, make decisions, evaluate after the trip and their behavior in future choosing the destination, making decisions, giving feedback after the trip and determining their behavior in the future (Baloglu and McCleary 1999 and Gallarza et al., 2002). In addition, their knowledge of the destination image will increase the predictability of tourist loyalty. The more visitors feel positive about a destination, the more capability to a higher return; and vice versa.

The purpose of this study is to draw conclusions about the relationship between antecedents and consequences of travel satisfaction in quantitative terms. Meta-analysis is a statistical technique used to synthesize the experimental results from earlier studies with the aim to explain the differences in the study results. Specifically, this study synthesizes the empirical results of 51 previous studies published concerning the destination image, satisfaction and consequences of satisfaction. The layout of the article is as follows: the first part examines the materials related to the destination image, satisfaction and consequences of satisfaction. Figuring out relationships to demonstrate the formation of hypotheses; moving on the next section, details about the process of analysis are presented, the results are analyzed; and finally concluded the conclusion. These findings have practical implications in developing marketing strategies and manage tourism destination image based on the comments of travelers about the destination image resulting in consequences of travel satisfaction.

THEORETICAL BACKGROUND AND HYPOTHESES

The identification, analysis, and measurement of factors affecting the satisfaction of tourists are the center of any attempt to understand and explain the choice of destinations and predict the likelihood of return traveler. So many models have been proposed from different assumptions. This study focuses on the relationship between antecedents and consequences of travel satisfaction based on a review of the definitions and measurements of the two structures is presented below.

Destination image

Pictures destination plays a critical role in decision making and travel behavior of travelers (Baloglu & McCleary, 1999). Travelers have an image about any particular destination which can be positive effect or negative effect to travelers in their making decision to that particular place. Understand the influence of destination image to evaluate how travelers choose their own destination, thus to more understand about the consumer behavior. Travelers usually tend to choose a specific destination based on what image they have about that destination and what they are going to discover about it. According to Gartner (1993) and Chen & Ladies (2013) for that image point to include affective, cognitive, and conative components. Cognitive component refers to knowledge of a tourist destination. Affective component is expressed through feelings toward different features of the destination. Conative aspects are expressions of behavior from guests and can be understood as acts of consumption on site. These three components represent three successive layers; based on the initial perceptions of destination, based on which tourists formed sentiments, emotions and then conative image.

This study focuses on analyzing images cognitive and affective images. In many previous studies, image perception is the point of investigation, namely with 4 entries in this study. The measurement of image-based cognitive attributes of destinations, such as the natural characteristics, the environment, infrastructure and service quality (Beerli và Martín, 2004 and Gallarza et al., 2002). Besides, more researchers have tended to look at the role of affective image. This represents 5 articles related to affective image were examined. Usually, affective images were evaluated by experienced feelings like happiness and excitement generated at the destination.

Travel satisfaction

Certainly, the satisfaction of tourists is particularly important for successful destination marketing because it affects the choice of destination, consumer products and services, and decided to go revisit (Kozak & Rimmington, 2000). The satisfaction was analyzed by a variety of travel size, such as: safety, convenience, information availability, quality of service and price, friendly attitude of the people in local, tourist information, history and culture (Anselmsson, 2006; Arabatzis & Grigoroudis, 2010). Furthermore, Oliver (1980) developed expectation-disconfirmation model in which consumers put their expectations on a product before purchasing. Then they compared the performance with initial expectations. If the actual performance exceeds their expectations, this leads to positive disconfirmation, which means consumers are happy and willing to buy that product again. However, if the actual yield is lower than originally expected, consumers are likely to seek substitutes for the next purchase. In tourism, traveler satisfaction based on comparing between expectations and experience after the trip (Chon, 1989). In this study synthesized 18 articles related to the satisfaction of the traveler.

Consequences of tourist satisfaction (Destination loyalty, Revisit Intention, Word of mouth, Trust)

In the marketing literature, repeat purchase or recommend to others is called loyalty of consumers. Similarly, the travel destination can be considered products; visitors can go back or recommend the destination to potential tourists as a friend or relative. However, the measure of the loyalty guests at a tourism destination is the subject matter interested researchers (Baker and Crompton, 2000, Ekinci et al 2013, Oppermann, 2000 and Yoon and Uysal, 2005). Another issue is the determination of a time frame in which customers have the ability or inability to return to the destination (Sirakaya-Turk et al, 2015). However, the approach loyal behavior cannot fully assess because visitors only on an Annual basis. This leads to difficult to explain the factors that influence the loyalty of travelers (Yoon and Uysal, 2005).

Revisit intention is a significant predictor to measure visitor behavior (Lee, 2009). Baker and Crompton (2000) to that behavior back is seen as intent willing to go back a tourist destination on a regular basis. Loyalty of visitors can reflect back through the tourist destination and is a commonly used indicator to assess the market strategy, namely the intention to visit a tourist destination guests (Chi & Qu, 2008; Engel, Blackwell, & Miniard, 2000). In addition, satisfaction is a key component in determining tourists return or not (Kim, Kim, & Goh, 2011). Thus, satisfying the requirements of the guests are very important because they have the satisfaction of great influence to the expectations and the decision turned tourist destination (Fuchs & Weiermair, 2004).

There have been many definitions and models proposed the term refers to word-of-mouth (WOM) by multiple researchers. There are many words used to describe it as diffusion, communications, messages, comments, reviews between at least two people on some product, service, brand, and experience relevant (Gajendra et al,

2012; Gupta & Harris, 2010; Shoham, Gavish, & Segev, 2012). Tourism marketers have identified several reasons for the importance of WOM in tourism. Specifically, losses in tourism products in intangible form, which means that visitors cannot judge before consumption, based on WOM is regarded as a means of evaluation (Lewis & Chambers, 2000). Therefore, the reference evaluation is a critical aspect of the process of decision-addition, as well as other industries, the tourism industry highly competitive credit, the use of WOM provide competitive advantage important for those who do travel (Litvin et al, 2008).

Trust is regarded as an important key to maintaining relationships between customers and suppliers (Chiu et al). The author also maintains that the level of customer confidence significantly affect its interest in acquiring the product. In the tourism industry, customers often have to make the decision to buy or even pay before they actually experience (Berry & Parasuraman, 1991), thus potentially leading to risk not meet guests' needs. However, vendors can still reduce the risk of customer awareness by building customer confidence (DeWitt, Nguyen, & Marshall, 2008). From this perspective, be able to use the trust of consumers as a powerful marketing tool to get customers' loyalty.

Study framework and hypotheses

This section examines the relationship between image of destination and tourist's satisfaction and the relationship between satisfaction and consequences of tourist satisfaction. Based on related documents, a research framework and corresponding theories have been proposed.

Affective image, Cognitive image on Destination Image

Most of the research in tourism focuses on cognitive factors of destination image through multi-attribute approach. These attributes

are essential elements of attracting tourists such as sights, or travelling experience. On the other hand, emotional attribute represents the tourists' feelings at any destination (Baloglu & Brinberg, 1997; Baloglu & McCleary, 1999b). Gartner (1993) suggested that emotional component often comes to operate at destination selecting stage. Walmsley and Young (1998) argued that emotional experience like joy or excitement was usually stimulated by the image of destination. The researchers showed that sentiment would base on cognitive evaluation while sentimental response is formed as a function of perception (Ryan & Cave, 2005; Vogt & Andereck, 2003). The distinction between cognitive and emotional components was emphasized in some models of tourism for making decision (Lin et al, 2007; Baloglu & McCleary, 1999b). Gartner (1993) noted that cognitive and sentimental components have differences but still ensure their hierarchy. Therefore, the image of destination is built up based on cognitive and emotional image of visitors. Stern and Krakover (1993) described that cognitive and emotional image created an overall one of the destination. Both cognitive and emotional image impose a direct impact on the overall whilst cognitive evaluation indirectly affects the overall image through sentimental evaluation (Baloglu, 1999; Baloglu & McCleary, 1999a, 1999b; Take for & Martin, 2004; Lin et al., 2007; Stern & Krakover, 1993). These results offer strong interactions between cognitive and emotional image and the image of destination. Based on the concepts and empirical research, five hypotheses are proposed:

Hypothesis 1: Relax positively influences affective image.

Hypothesis 2: Pleasant positively influences affective image.

Hypothesis 3: Exciting positively influences affective image.

Hypothesis 4: Natural characteristics positively influences cognitive image.

Hypothesis 5: Amenities positively influences cognitive image.

Hypothesis 6: Service quality positively influences cognitive image.

Hypothesis 7: Affective image positively influences destination image.

Hypothesis 8: Cognitive image positively influences destination image.

Destination image and Travel satisfaction

The satisfaction of tourists affected positively by the image at the destination (Bigne et al., 2001), and tourists depend on their knowledge to assess the destination can meet demand their travel or not, and their purchase decisions must include an assessment of the risks involved. Chon (1990) noted that the image-closing an important role in decision-making processes of the visitors. Most of the marketing strategy aims to create an image or reinforcing a positive image in the minds of travelers in your target market (Chon, 1990; Pike, 2004). Chen & Tsai (2007) found that the image destination indirect influence satisfaction through value trips and received through direct impact and indirectly to behavioral intentions. Ibrahim and Gill (2005) note that there is a positive correlation between destination image and customer satisfaction: perceived image as a positive destination, tourist satisfaction as high. Therefore, the following hypotheses are proposed:

Hypothesis 9: Destination image positively influences travel satisfaction.

Travel satisfaction and Consequences of travel satisfaction

In the tourism sector, many studies show that the satisfaction of tourists is an important indicator to assess the behavior go back and recommend the destination to others (Bramwell, 1998; Kozak, 2001; Kozak & Rimmington, 2000; Ross, 1993; Yau & Chan, 1990; Yoon & Uysal, 2005). Guests are more likely to return to the same destination and willing to share travel experiences for their active

with friends and relatives. WOM is particularly important in tourism marketing as this is considered as trustworthy sources of information for potential tourists (Yoon & Uysal, 2005). Some empirical studies examine the antecedents of loyalty of travelers (Backman and Crompton, 1991 and Cronin et al., 2000), the results showed that satisfaction is an important predictor for measuring measurement fidelity. Some studies confirm a positive relationship between customer satisfaction and loyalty (Cronin et al., 2000 and Hosany and Prayag, 2013). Walse, Henning-Thurau, Sassenberg and Bornenmann (2010) demonstrated that satisfaction has a positive effect on confidence, while the satisfaction and confidence to positively influence loyalty. In addition, overall satisfaction creates trust (Delgado-Ballester & Munuera-Aleman, 2001). Based on the review, the first four hypotheses, therefore, would be:

Hypothesis 10: Satisfaction positively influences Consequences of travel satisfaction Loyalty.

Hypothesis 11: Satisfaction positively influences Consequences of travel satisfaction Trust.

Hypothesis 12: Satisfaction positively influences Consequences of travel satisfaction Revisit Intention.

Hypothesis 13: Satisfaction positively influences Consequences of travel satisfaction word-of-mouth.

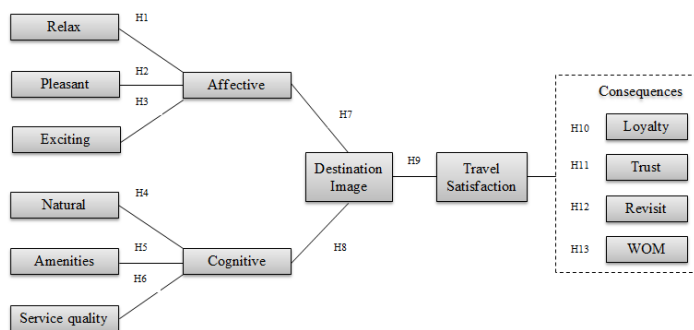


Figure 1 - The Conceptual framework of this study

STUDY METHODS

Meta-analysis is a statistical method combining the experimental results of the study were published earlier, were applied in this study. Compared with other methods of single, meaningful meta-analysis is a comprehensive evaluation and systematic from the findings of previous studies. This method is commonly used in many different areas, including in the economic sector and the social sciences, anywhere to interpret the results or effects from different studies. However, the meta-analysis are not applied much in tourism research.

Sample selection

The first step, the database was searched for studies related to the destination image, satisfaction and satisfaction Consequences of travel, including ScienceDirect, EBSCO, SAGE, and Taylor & Francis. The big travel magazines provided by the database include: Tourism Management; Annals of Tourism Research; Journal of Travel & Tourism Marketing; Journal of Destination Marketing & Management; Tourism Geographies; Procedia - Social and Behavioral Sciences; international Journal of Tourism Research.

Search-related original empirical research articles published from 2000-2015, refers to the relationship between destination image, satisfaction and Consequences of travel satisfaction. Follow these three steps. First, the keywords related to the destination image (e.g. destination image, affective image, cognitive image) Consequences of travel satisfaction (Loyalty, trust, revisit intention, WOM) is looking for to build a database for this study. Second, the quantitative study to examine the relationship on selected. Third, studies have showed that the sample size, the coefficient of correlation, regression coefficients and path coefficients. The remaining studies were excluded because they did not meet the above criteria. A total of 33 articles related to the total sample of 23.077.

Coding

The researchers chose to be classified based on several aspects, including the author, year of publication, sample size research context, the independent variables and the dependent variable, and data analysis methods (structural equation modeling, correlation analysis, regression analysis). Four criteria were observed. First, calculate average, for multi-attributes measurements. Second, if there is no significant impact, this study is encrypted not significantly affected as 0 in the database. This is done based on the consistency factor as some previous studies. Third, the total impact may not exceed 1. Fourth, the total impact was collected from studies using structural equation modeling.

Table 1 - Studies used in the meta-analysis ^{a,b}

Akhoondnejad (2016) ¹ , SAT-LOY; SAT-TRU	Phillips and Jang (2010) ¹⁰ , REL-AFF; PLE-AFF; EXC-AFF
Akhoondnejad (2015) ² , SAT-REV	Ramon, Santiago, Carlos & Javier (2015) ² , DES-SAT
Chen and Phou (2013) ¹ , DES-SAT; SAT-TRU	Ramseook-Munhurrun, Seebaluck, and Naidoo (2015) ⁵ , DES-SAT; SAT-LOY
Choo and Petrick (2014) ¹ , SAT-REV	Santiago, Ramon, Javier; et al.(2014) ⁴ , SAT-TRU
Hutchinson, Lai and Wang (2009) ¹ , SAT-REV; SAT-WOM	Shi, Prentice and He, (2014) ⁹ , SAT-LOY
Jeong and Holland (2012) ² , NAT-COG; AME-COG	Sirakaya, Petrick and Choi (2004) ³ , SAT-REV; SAT-WOM
Kim, Jung, Kim and Fountoulati (2015) ⁷ , DES-SAT	Song, Lee, Kim, Bendle & Shin (2014) ² , SAT-TRU
Kim, Kim, and Kim (2009) ¹ , SAT-TRU; SAT-REV	Song, Su & Li (2013) ² , DES-SAT
Kim and Perdue (2011) ² , SER-COG	Su and Hsu (2013) ² , SAT-REV; SAT-WOM
Kim and Yoon (2003) ² , REL-AFF; COG-DES; AFF-DES	Sun, Chi and Xu (2013) ³ , DES-SAT; SAT-LOY
Lai (2014) ² , SAT-LOY; SAT-TRU	Um, Chon, and Ro (2006) ³ , SAT-REV
Lee (2016) ¹ , SAT-LOY	Wang and Hsu (2010) ² , NAT-COG; AME-COG; SER-COG; COG-DES; AFF-DES; DES-SAT
Lin, Morais, Kerstetter, and Hou (2007) ⁸ , REL-AFF; PLE-AFF; EXC-AFF; NAT-COG; AME-COG	Whang, Yong and Ko (2016) ⁶ , COG-DES
Martínez and Alvarez (2010) ² , PLE-AFF; EXC-AFF; SER-COG; AFF-DES	Wong, Wu, and Cheng (2014) ¹⁰ , DES-SAT; SAT-LOY
Martínez and Bosque (2013) ⁹ , SAT-LOY	Yoon and Uysal (2005) ¹ , SAT-LOY
Özdemira and Şimşek (2015) ⁵ , DES-SAT	
Papadimitriou, Apostolopoulou, and Kaplanidou (2013) ⁸ , AFF-DES	

Note:

a The numbers after the abbreviation stand for the journals which the articles belong to, can be listed as below:

- (1) Tourism Management
- (2) Journal of Travel & Tourism Marketing
- (3) Annals of Tourism Research
- (4) Management Decision
- (5) Procedia - Social and Behavioral Sciences
- (6) Journal of Business Research
- (7) Tourism Geographies
- (8) Journal of Travel Research
- (9) International Journal of Hospitality Management
- (10) International Journal of Tourism Research

b The abbreviations after the public year of each author stand for the supported hypothesis in their articles. There are 13 hypotheses as listed below:

REL-AFF: Relax-Affective image; PLE-AFF: Pleasant-Affective image; EXC-AFF: Exciting-Affective image; NAT-COG: Natural-Cognitive image; AME-COG: Amenities-Cognitive image; SER-COG: Service quality-Cognitive image; AFF-DES: Affective image-Destination image; COG-DES: Cognitive image-Destination image; DES-SAT: Destination image-Travel satisfaction; SAT-LOY: Travel satisfaction-Loyalty; SAT-TRU: Travel satisfaction-Trust; SAT-REV: Travel satisfaction- Revisit intention; SAT-WOM: Travel satisfaction-word of mouth.

RESULTS AND DISCUSSIONS

Table 2 – Results of meta-analysis

Hyp	Variable		K	Total	Effect Size & 95% Confidence Interval			Heterogeneity			
	Indepen dent	Dependent	Studi es	n	r	LCI	UCI	p- value	Chi- value	Q- value	I- Square d
1	Relax	Affective	3	2000	0.453	0.417	0.487	0.000	10.59 7	137.507	98.546
2	Pleasant	Affective	3	1949	0.514	0.481	0.546	0.000	10.59 7	176.703	98.868
3	Exciting	Affective	3	1949	0.387	0.348	0.424	0.000	10.59 7	74.801	97.326
4	Natural character istics	Cognitive	3	1882	0.252	0.210	0.294	0.000	10.59 7	19.403	89.692
5	Amenitie s	Cognitive	3	1882	0.220	0.176	0.262	0.000	10.59 7	9.336	78.577
6	Service quality	Cognitive	3	914	0.599	0.529	0.662	0.000	10.59 7	11.249	91.110
7	Affective image	Destination image	4	1683	0.595	0.564	0.625	0.000	12.83 8	45.899	91.285

8	Cognitive image	Destination image	3	1036	0.636	0.592	0.676	0.000	10.597	73.899	98.647
9	Destination image	Travel satisfaction	10	4935	0.552	0.532	0.571	0.000	23.589	370.009	97.568
10	Travel satisfaction	Loyalty	9	4023	0.585	0.564	0.605	0.000	21.955	485.353	98.352
11	Travel satisfaction	Trust	6	4052	0.689	0.668	0.709	0.000	16.750	283.196	98.234
12	Travel satisfaction	Revisit	7	3241	0.567	0.543	0.590	0.000	18.548	338.935	98.230
13	Travel satisfaction	WOM	3	1414	0.786	0.765	0.805	0.000	10.597	3.649	45.184

First of all, table 1 shows the meta-analysis results for the antecedents and consequences of travel satisfaction. Using the mean values of the correlation coefficients from previous studies, the results show that the variable of relax demands has a positive influence on affective image ($r=0.453$). Based on the criteria set out in Lipsey and Wilson (2001), this relationship has large effect sizes. Furthermore, the Q-value is higher than Chi-square value, which means that the influence is significantly different from the variance attributed to factors rather than from the sampling errors. The results with regard to hypothesis 1 are in line with those in Phillips and Jang (2010), which found that relax tends to have high affective image.

For the hypothesis 2, the results show that the pleasant has positive influences on affective image

($r=0.514$, large effect size). Furthermore, the Q-value is higher than the Chi-square value, which means that the influence is significantly different from the variance attributed to factors rather than from the sampling errors. These results are line with previous studies which explained that pleasant tends to influence affective image Lin, Morais, Kerstetter, and Hou (2007).

With Hypothesis 3, in order to evaluate the relation between exciting and affective image. There is a correlation ($r = 0.387$) so it has medium effect between exciting and affective image. The index of heterogeneity ($I^2 = 97.326\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p = 0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H3 are supported and it can be concluded that exciting has positive influence on affective image.

Previous research hypothesis stated that natural characteristics have positive influence on cognitive image. In particular, there is a correlation ($r = 0.252$) so it has medium effect between natural characteristics and cognitive image. The index of heterogeneity ($I^2 = 89.692\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p = 0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H4 are supported.

With Hypothesis 5, in order to evaluate the relation between amenities and cognitive image. There is a correlation ($r = 0.220$) so it has medium effect between amenities and cognitive image. The index of heterogeneity ($I^2 = 78.577\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p = 0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H5 are supported and it can be concluded that amenities has positive influence on cognitive image.

According to previous hypothesis 6, in order to evaluate the relation between service quality and cognitive image. There is a correlation ($r = 0.599$) so it has medium effect between service quality and cognitive image. The index of heterogeneity ($I^2 = 91.110\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p = 0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H6 are supported and it can be concluded that service quality has positive influence on cognitive image.

Preview research hypothesis stated that affective image have positive influence on destination image. In particular, there is a correlation ($r= 0.595$) so it have medium effect affective image and destination image. The index of heterogeneity ($I^2= 91.285\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H7 are supported.

With Hypothesis 8, in order to evaluate the relation between cognitive image and destination image. There is a correlation ($r= 0.636$) so it have high effect between cognitive image and destination image. The index of heterogeneity ($I^2= 98.647\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H8 are supported and it can concluded that cognitive image has positive influence on destination image.

Following hypothesis 9, in order to evaluate the relation between destination image and travel satisfaction. There is a correlation ($r= 0.552$) so it have high effect between destination image and travel satisfaction. The index of heterogeneity ($I^2= 97.568\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H9 are supported and it can concluded that destination image has positive influence on travel satisfaction.

According to preview hypothesis 10, in order to evaluate the relation between travel satisfaction and loyalty. There is a correlation ($r= 0.585$) so it have medium effect between travel satisfaction and loyalty. The index of heterogeneity ($I^2= 98.352\%$) shows that this hypothesis has highly heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H10 are supported

and it can be concluded that travel satisfaction has positive influence on loyalty.

Previous research hypothesis stated that travel satisfaction has positive influence on trust. In particular, there is a correlation ($r=0.689$) so it has high effect travel satisfaction and trust. The index of heterogeneity ($I^2=98.234\%$) shows that this hypothesis has high heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H11 are supported.

According to previous hypothesis 12, in order to evaluate the relation between travel satisfaction and revisit intention. There is a correlation ($r=0.567$) so it has medium effect between travel satisfaction and revisit. The index of heterogeneity ($I^2=98.230\%$) shows that this hypothesis has high heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H12 are supported and it can be concluded that travel satisfaction has positive influence on revisit.

With Hypothesis 13, in order to evaluate the relation between travel satisfaction and WOM There is a correlation ($r=0.786$) so it has high effect between travel satisfaction and WOM. The index of heterogeneity ($I^2=45.184\%$) shows that this hypothesis has high heterogeneity. In addition, Q-value is higher than chi-square and p-value ($p=0.000$) < 0.05 it means that the subset of effect size is highly heterogeneous. Therefore, H13 are supported and it can be concluded that cognitive image has travel satisfaction on WOM.

IMPLICATIONS AND CONCLUSIONS

Although there is a significant amount from the previous study of destination image and satisfaction, however due to the multidimensional nature of the structures and the differences between the studies leading to the difficulty in determining strong linkages to the above hypothesis. This research synthesis published 33 articles

with intent conclude easily at the level of individual studies. Four hypotheses have been proposed and tested through the meta-analysis. The analytical results show that the impact of the relationship between destination image and satisfaction. Therefore, the destination image plays a major role in building the satisfaction of tourists.

The findings provide evidence that the destination image with strong impact to the satisfaction, in particular based on the perceived image evaluation, emotional image of the destination. Unlike other physical product, tourism products are intangible products, so choosing a destination is much more complicated than choosing other tangible goods. So to build an attractive site to increase awareness picture, emotionally thereby improving visitor satisfaction. This makes sense in marketing and destination management.

In addition, the satisfaction of tourists is considered an important factor in building their loyalty and trust that led to the return and share the positive experience for other people.

Because of the uniqueness of tourism products, loyalty, trust has proven to be one of the strategic directions for sustainable tourism management. A loyal guest has confidence with the ability to share a positive experience for their friends and family, which is regarded as a reliable source of information in making decisions.

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THE DYNAMIC ROLE OF AUGMENTED REALITY IN TOURISM

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The use of mobile phones has undoubtedly paved the way for the utilization of technological intermediation in the tourism sector. This article presents a study of the proposed relationship that can occur between augmented reality (AR) as a technological tool and mobile phones which can in turn increase the touristic attraction. To achieve the aims of the study, qualitative interviews with consumers and producers who are interested in AR applications were done. Snowball sampling was used to collect responses. The results have shown that the use of AR leads to an augmented construction of an actual reality that is multidimensional and is composed of the owner, site, and touristic agency. Consequently, technological tools take on a secondary role since it becomes integrated in the

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production and consumption process, and becomes an integral part of numerous experiences, procedures, competition processes and touristic product consumption. Furthermore, the integration of modern technology in the touristic experience will undoubtedly enhance that experience and makes it more enjoyable in addition to improving expertise and skills in the touristic operation and attraction process.

Keywords: *Augmented reality, Tourism experience, Marketing, Technology mediation, Perception.*

INRODUCTION

Tourism is facing a growing need for incorporating modern technologies in its industry. (AR) is but one example as an application that provides the world with additional information. This is achieved by overlaying visual, auditory, or even haptic materials on physical objects (Azuma, 1997; Feiner, 1997; Barfield & Caudell, 2001), where the ultimate goal of AR is to support user interaction with the world around them (Starner, 1997; Barfield & Caudell, 2001; Starner, 2015).

AR is defined by Oxford dictionary as “a technology that superimposes a computer-generated image on a user's view of the real world”, thus providing a composite view coupled with the massive influx of tourists to destinations and point -of -interests (POIs) all over the world. As the ease of marketing and presentation became necessary, the development of personal technologies was inevitable such as small, easy to carry, and relatively inexpensive computing devices designed to serve the unique informational needs of their users (Weiss, et al., 2001), such as smartphones, tablet computers, and smart wearable devices.

The co-dependent relationship between tourism and technology requires the necessary adjustments to integrate the new devices into the everyday routine of tourism productions as indicated by previous researchers (ComScore, 2011; Oulasvirta, et al., 2012; Nielsen, 2014)

who continued to explore their perception and impact on the real-world industry. In tourism industry, AR may produce three-dimensional models (1-Direct encounter: tourist – destination, 2-Contemporary mediation: tourist-tour guide- destination, 3-Technological mediation: tourist-technology-destination). These dimensional models explain the roles of Internet Computer Technologies (ICTs) in tourism industry and the real time interactively between producer-consumer with a very low cost (Yovcheva, et al., 2011; Leue, et al., 2014; Han, et al., 2014; Yovcheva, et al., 2015; Leue, et al., 2015). Several researchers indicated significant importance of the roles of ICTs in daily experiences and the spillover effects of these technology mediated experiences on travel and tourism industry worldwide (Wang, et al., 2014).

Despite the debate over the use of AR in tourism marketing and promotion, such a technology may bridge the gap between what is real and what is expected. In other words, AR brings the end users closer to the social life of destinations and mitigates the unexpected. Furthermore, it enhances the tourists new perception, cognition processes, and contributes in the decision making process (Yovcheva, et al., 2011; Kounavis, et al., 2012; Yovcheva, et al., 2015).

Accordingly, a positive sense of the space might have been created and worked as a motivation to a real visit. Besides, the perception of users and stakeholders will have been weighted against a successful tourism experience (Smith & Schoene, 2012). For these reasons, this study elaborates on the use of AR in tourism and introduces qualitatively the opinion of users and how their perception may impact the decision of using such a technology. In addition, the tourism producers, once adopt the AR technology may reduce the expenses and promote the least known destinations to a wider group of customers (Nurminen, et al., 2014). Recent studies aim at improving the technological design for existing users to attain the acceptance of using AR applications, measuring the satisfaction of

the user and his perceptive experience of the expected benefit of those applications (Olsson & Salo, 2011).

The use of smart phones and hand-held devices is considered as affordable and simple (Miller, 2012). This study focuses on studying a downloadable smart phone application supported by App Store program and Android and is called LAYAR. This application is the most popular and widely used program on mobile phones (Rice, et al., 2009), since this program can display and highlight to the user many possibilities and preferences to test how mobile applications can be used for example in navigation (Lee, et al., 2012) and also clarifies several key points that have been set and selected by the tourism product (Nelson & Chapman, 2015). Furthermore, the LAYAR program enables the use of downloaded images using the Geographical Positioning System (GPS) using the built-in camera of the mobile device, a compass, and an accelerometer (Jang, et al., 2005).

After communicating with many users of the program (LAYAR) two groups of users were found: the first group that wants to register specialized data on topics related to the touristic journey which will enable the tourists to re-live the touristic experience even after going back to their native country. The second group that wanted to use the (LAYAR) program to create a comprehensive and well-informed and historical vision of the visited touristic site. When analyzing those results for the tourism activities, the importance of this study emerged, which will focus on gaining knowledge of strategies and advanced technologies that are necessary to fully understand the ability of these modern and advanced technological applications to reproduce and revive touristic sites.

The tourism sector around the world has suffered greatly in the past 5 years due to political conflicts, economic difficulties and inflation. Tourism producers use costly tools to attract tourists and promote touristic destinations in addition to poor and ineffective utilization of modern advertisement tools to improve the current decline in tourism sector income (Maaiah, 2014). Consequently, the

current research, discusses the various aspects of AR as a tool within the reach of all users (producers and consumers), and therefore might help in promoting an attractive touristic image and show the stability and security that ensures internal and external tourists safety and well-being.

THEORETICAL BACKGROUND

Technological Mediation In Tourism Experience

The intertwined relationship between space and place in tourist destinations is exemplified by Harrison and Dourish (1996) as being a tourist opportunity and a tourist place respectively. The space of a tourist site can be described as a 3D representation of the touristic place or the place in which we live or visit for a specific amount of time. Location based-services (LBS) are services typically designed to serve their users, such as navigation, planning, and provide information about the location (Schiller & Voisard, 2004). The only practical application of LBS program is to help people explore and identify their surrounding environment. Furthermore, LBS is providing augmented walking experiences for tourists (Gleue & Dahne, 2001; Fritz, et al., 2005; Han, et al., 2014; Chung, et al., 2015; Tom & Jung, 2015).

Community members use physical tools to navigate across the surrounding environment (space), whether those tools were tourist site guide tools (Spring, 2006) field maps (Vertesi, 2008) or spatial evidence of tangible heritage (Persky, 2011). But with the availability of modern technology, which allows affordable and constant connection with great computing capabilities while on the move (Tussyadiah, 2017), there has been symmetrical and competitive techniques to offer multiple and advanced services in all fields, especially in the field of tourism. This is done to both present the touristic place or to present the surroundings and its advantages and properties without even the need for the interference of service providers (Ebert, et al., 2009). The study of these modern technological tools such as smart watches and smart glasses (Rauschnabel, et al., 2015; Tom & Jung, 2015) can clearly reveal how

tourists can visit local and international tourist sites, interact with the local cultures, and navigate through history without even leaving their place of residence (Urry, 1995; Knudsen & Waade, 2010; Towner, 2011).

Augmented reality techniques enable the users to enjoy tourist sites and services through realizing spatial reality before users on a real temporal scale and incorporated content of the offered services (Ershow, et al., 2011). Computing devices will increasingly subsume to the personal space of their users, allowing them to help more intelligently, consistently, and continuously. Therefore, the availability of an AR technology on portable devices at an affordable price, as they are embedded in the experiences and actions of their users (Tussadiah, 2014) was made possible through internet services which allowed tourists to truly live touristic experiences (Dourish, 2006). Furthermore, understanding the potential of this technology encourages tourism producers to expand their offers and use versatile and modern marketing tools effectively (Thrift & French, 2002; De Souza & Silva, 2006; Sheller & Urry, 2006; Aurigi & De Cindio, 2008).

The use of smart glasses in facilitating tourism experiences in AR, have become viable due to the full support of several technological means (Tom, et al., 2016). The use of wearable technological devices and its implications on touristic experiences was extensively discussed in literature and mass media (Prabu, 2012; Dickey, 2013; Tussadiah, 2014). In addition, the deployment and enrichment of these programs with relevant tourism information are simplified and technologically affordable with regards to visual information, interaction, spatial and temporal reality, expertise, and tourist services (Maaiah, 2014). For example, indoor touristic experiences enhanced with AR are developed in museums, art galleries, and indoor theme parks by overlaying exhibits with additional information through touch-screen displays, smartphones, and/or wearable devices (Wojciechowski, et al., 2004; Damala, et al., 2007; Jung, et al., 2015; Leue, et al., 2015; Tom & Jung, 2015).

There are many studies that focused on the commercial potential, modern design patterns, and the adoption of a tour guide through mobile phones (Junglas & Watson, 2008). With regard to smart phone AR applications, they create an advanced technological impact through linking and analyzing the available information. It has

a remarkable ability to create a relationship between the surroundings, navigation and efficient marketing of a touristic product (Sutko, et al., 2011). It makes the augmented content of a touristic product an integral part of the touristic site itself. It also allows tourists to see this catalog content in multiple manners and at the same time allows them to save such content or marketing offers (Kitchin & Dodge, 2011). Furthermore, AR applications through smart phones can be of great effectiveness in the areas such as browsing, navigation and identification of the experience of others, if it is applied in urban places more than other less civilized places (Fehlings, et al., 2013).

The use of software applications of mobile phones is only a reflection of how individuals consume the surrounding space, but the creation of AR has the chance to re-produce the space, which can be represented by a symbol (Nelson & Chapman, 2015). Since spaces or augmented spaces are an integral part of people's everyday lives and represented by a specific code, they can be re-organized and re-arranged (Kitchin & Dodge, 2011). Consequently, a code or a symbol can reproduce the meaning of a site's reality, it also explores the social and spatial realities (Smith & Schoene, 2012). According to Penn (2015) the relationship between the icon and the place is a constituent relationship through inference that the roads and sites and cities may disappear in the event of failure of the program to work perfectly (for example: airports, which rely mainly on software and geo-localization techniques that show us on the screen a AR of a true reality, if that software failed or broke down, all actions and operation dependent upon the software will cease to function leading to chaos)

Among the previously mentioned potential applications of AR on modern technological devices, the LAYAR program, a firmly established AR application, allows its user to establish his content (Nelson & Chapman, 2015). This use is identical to the geographical site localization (Mobile geotagging), which is simply a technology used to connect information available on the internet, or digital content with the actual touristic location (Fehlings, et al., 2013). Given how a geographical site is located, this may generate a new set of practices. The LAYAR program marketing tools allow the touristic producer to spread an augmented content, enhanced with compound visual techniques of a tourist site using 2D and 3D technologies,

which becomes visible only when tourists reach the touristic site and use the technology (Miller, 2012). Augmented reality programmers connect the tourist sites database with 3D models (Liao, 2012) and create algorithms that can represent the true reality by a non-matching AR (Graham, 2012). Many possibilities have emerged in relation to smart phones AR applications, which showed the dynamic force that lies behind these applications (Sheller, 2006; Graham, 2012).

The multi-modular relationship between media and marketing, the symbol and touristic surrounding was researched extensively. Tom Dieck and Jung (2015) see that the augmented surrounding works by eliminating any ambiguity between the physical and augmented surroundings, while the study of Farman (2012) went a step further by including the embodiment of media using mobile phones and the social production of the surrounding. He shows that the ways and methods that use mobile phones are implemented into the daily lives of individuals. Accordingly, they become sensory-inscribed to reflect the complementarities between the media and marketing, surrounding and marketing bodies to represent a certain tourist reality (Graham, 2012).

Undoubtedly, differences exist between individuals in using and dealing with AR and in realizing the uses and benefits of such programs and therefore use them to achieve their goals and needs. According to De Certeau (1984), there are two types of augmented spatial patterns: strategic or tactical, which characterizes the modern civilized reality. The strategic pattern tries to distinguish its own places and is usually practiced by certain authorities, such as governments and armed forces and cities, those who have the power to build, design and create databases, motion control, and the formation of regulatory technological software programming and possess their own AR pathways. On the other hand, the tactical pattern is used by the weaker part of society that depends on specific sectors, some activities, and some producers to formulate, in one way or another, specific pathways to the individual users. Here, if people tried to resist attempts to make their surroundings transparent or electronic, those attempts are considered spatial and tactical.

The AR technology works to represent the touristic destination and its surrounding using a symbol that can be accessed and identified using mobile phones and computers, which gives strategy makers the power to implement their ideas (Kitchin & Dodge, 2011). On the

other hand, those who oppose these modern technologies can use AR techniques via mobile phones to distribute and advertise several activities using direct communication (Graham, 2012).

MATERIALS AND METHODS

Firstly, this study reviews previous literature on practices of mobile geotagging and content creation by using LAYAR app, that enhance our understanding of current touristic practices related to production and consumption. Then attention is turned towards the relationship between code and space. Finally, since the focus of the current study is on people's touristic practice in and through space, De Certeau (1984) theoretical and analytical framework was applied to understand mobile AR uses as tactical spatial practices.

In the current study the interpretivist framework was applied; this frame work allows researchers to interpret multidimensional elements. The above-mentioned frame work, allows the examination of users' practices, experiences, interactions, and perceptions of a social daily practice as a mobile AR in their touristic usage.

DATA COLLECTION

60 LAYAR users were interviewed in-depth, all of them were recruited via snowball sampling. Interviews were all conducted over whatsapp, Facebook and Skype. Of the 60 participants, 28 men and 32 women were interviewed, ranging in age from early-20s to mid-50s. The interviewed individuals were either recent users of LAYAR (6 weeks) or started using the service shortly after it launched. Of the 60 participants, 39 participants used the open Application Programming Interface (API) to create new layers. Additionally, the snowball sampling revealed a group of artists who founded a group called Manifest.AR. This newly founded group is described as an international collective working with growing forms of AR as interventionist public art.

The conducted Interviews were audio recorded and transcribed to ensure accuracy of recorded information. Names of informants are pseudonyms unless interviewees explicitly waived confidentiality. Many questions were presented to the participants who used LAYAR

including: how participants used LAYAR, how using LAYAR influences their experiences and decisions regarding touristic destinations, and how LAYAR changed their relationship with the spaces around these destinations. Follow-up questions mainly focused on more specific uses of LAYAR, depending on whether they were viewing content or creating content layers, or both. Creators of content were asked about their motivations for creating layers, their views on the relationship between their layers and the physical space, and how creating layers affected their perceptions of touristic space. The duration of the Interviews ranged from 20 to 40 minutes, with an average of 35 minutes.

DATA ANALYSIS

The study uses a snowball sampling method (exponential non-discriminative: the first subject recruited to the sample group provides multiple referrals and then each new referral is explored until primary data from sufficient number of samples are collected) to collect data about experiences, practices, interactions, and perceptions of AR users in the tourism industry and managers in the AR industry (Fig. 1). The sampled subjects were asked about AR program, their impact on the decision to visit a tourist site, and their impact on the relationship of those individuals at destinations. The feedback application forms were filled by subjects who were subscribers to the social media ‘LinkedIn’ among which are executive managers and workers in the field of AR and users of AR for tourism purposes.

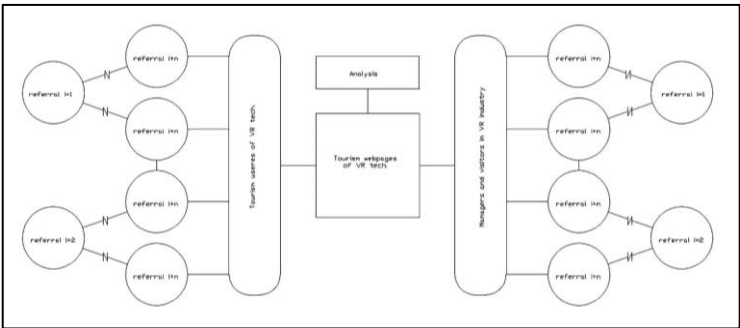


Figure 1: Snowball sampling methods.

The study adopts the principle of De Certeau (1984) by considering what lies behind the users acts due to its important and meaningful value, rather than recording the abstract behaviors and acts as they are. What concerns us is the benefit that can be attained from using a program and the reason for using it rather than the common methods of using it since this is the main focus of the current research, which aims to explore the processes by which the user interacts with the emerging technology. This study prioritizes the following: the details of the touristic journey, and description of different roles carried out by people in the tourist sites (Crang & Graham, 2007). Data analysis in the current study was achieved by creating a matrix and comparing the responses with several similar questions in order to form a comprehensive description and thorough understanding for those who provided information. The uses of the AR programs by the subjects were classified according to tourist places that were uploaded to the program, the time frame of the program use, how and why they uploaded this particular tourist site, and what they intended to know from such a use. Analysis of the similarities and differences through a matrix of information allows us to identify regularities, consensus and idiosyncrasies in the data.

RESULTS:

The findings demonstrated that AR users became less aware of their surroundings compared with none AR users which can be attributed to the relatively deficient performance of AR applications on modern smart phones including chaotic and confusing presentation which leads to wasting the users' time to properly process and understand how the presented results can be utilized. Furthermore, the quality of the entire experience while using the AR applications (LAYAR) is further worsened by unanticipated result behavior which is due to numerous movement delays and unpredictable delay of the augmented objects. Finally, public use of AR applications was associated with unforeseen difficulties related to public acceptability

since using these apps involves physically interacting with the app by having to point the device and hold it in the direction information is sought after. However, several advantages were associated with using AR applications as opposed to other navigational applications as seen by the ability of AR apps to improve the users' understanding of destination related information such as proximity, directions and spatial relations.

CREATING THE TOURISTIC AUGMENTED CONTENT

Because many of the primary users were those who formed and created their own touristic reality, the results of this study focused on the purpose and how the creation of the augmented content came about, and how that number of touristic augmented realities can interact with hundreds of advertising methods and media and traditional tourism marketing. In Canada, for example, a user established his own company, and established several layers of AR for touristic destinations, one of which included a Metro station in his residential area (Quebec). Another user created an application running on filming a number of tourists who had their pictures displayed in a music festival for the purpose of tourism marketing. All users who have created their own touristic reality admitted that using AR programs have allowed them to change their relationship with the actual space reality that surrounds them.

The touristic producers acknowledged that seeing a touristic site in reality and then using AR program to visualizes what they would look like helped to motivate them to implement these changes to improve touristic sites. The ability to actually see the potential benefits of the suggested improvements without having to actually be burdened with their cost was one of the utmost advantage to the users.

When a Tour Operator in Canada was asked if his experience using the AR program has changed his perception of the reality itself he answered: Sure, now, wherever I go, and when I visit a touristic

site, whether it was formerly known as a tourist destination or not, I always start thinking about what this place would be using a special program of AR, and start to imagine many of the activities, services, enhancements, views but my perception goes beyond that to achieve greater impact. Similarly, another participant who is the manager of a theater in New York City, stated that AR programs helped her to form a comprehensive outlook of the theater she is in charge of. Furthermore, she found that she had more control over the theatrical environment and had better perception and awareness of the possibilities related to the theater in all of its aspects to a much greater degree which was not possible before using AR programs. She added that she always objects on all proposals submitted to improve the theater, but now she is more willing to accept these proposals and suggestions since she can actually view what they look like and how they will change the actual reality with no extra cost when using AR applications.

In the conducted interviews, it was clear that AR applications are able to play an important role in providing solutions to the basic services provided in the touristic field. This would surely have a major and positive impact on the tourism reality that suffers from many drawbacks, and which at the same time is working to provide and offer services for visitors to the tourist areas (by providing them with information they are unaware of regarding the tourist place) and to its inhabitants.

An AR programmer, in a tourist office, says that these modern technological applications enable us to travel to destinations that seems impossible to physically access due to security risks or difficulty in reaching them. Having said that, as users of AR applications, in these circumstances, users are free to create augmented perception of such inaccessible places that may exceed the limits and restrictions.

Another participant, who works in the field of tourism transportation in France, gave an idea related to what motivated her

to establish an augmented layer for serving public and private sectors, and to the residents and visitors of the region. She said that in France she uses a car sharing service (Car Share) such as Auto Car System. She added that the big challenge when using such a service, is locating a rental office that uses the same service in another city in France or the European Union. This service will not be possible without using this specialized LAYAR of the AR program.

Consequently, the producers of augmented layers had a unique purpose behind establishing them, which will benefit tourists who are seeking different services. In the following, a discussion will be conducted regarding what has been offered by producers concerning the archiving and preservation of certain touristic souvenirs. Researchers believe that AR applications may be one of the most important applications in the field of tourism in any destination. For instance, the city of Petra in addition to other Jordanian tourist sites need to be presented and marketed as a tourist destination through AR applications, which will open a way for the many museums, researchers, governmental and private sector authorities and workers in the Jordanian tourism sector to preserve and protect it. This will create a strong relationship between the used symbol in the application and the touristic site itself. Recently, in Iraq and Syria very large proportions of the heritage and cultural treasures and valuable monuments were destroyed. If AR applications were used, it would have ensured their existence and preservation.

These practices mentioned above, highlight a complementary and fundamental relationship between an AR symbol and an actual real place. As time passes, those symbols become an integrated wholesome entity, in that the touristic site will have a different meaning without it. Furthermore, it becomes the only way to acquire information related to the touristic site and also preserves it and improves or modernizes it as time passes. Often, as youngsters, we passed in different places and public squares, and remember that there may be a statue or monument.

However, as time passes, a number of these monuments and statues that represent a certain value were removed. Remembering details that were part of a place that previously had been known is somewhat hard unlike getting accustomed to more modern buildings and institutions which are not difficult to be familiarized with over time. But with AR applications it will be much easier to preserve information and details for many generations to come. This may represent a new tourism product in any visited city, which encourages travelling and visiting, and acquire a tremendous amount of information that may not exist in brochures. Furthermore, the tourist will be able to compare the information given to him with the touristic site that tells its story which enables the tourist to experience the actual spirit of the place in multiple time periods in history.

This research does not only show and explain the theoretical aspect of the study of AR, but it also shows how tourists are influenced by the touristic environment that surround the touristic site they are visiting, which was represented by the applications of AR. The results also show the influence AR applications have on the perception of users whether they were tourists or touristic producers of AR applications. It is only natural for tourists to be aware and receptive of the destination they are visiting and all of its surroundings, even without the use of modern technological tools, but still may have a different perception of the touristic site when using AR applications. Consequently, the authors believe that one of the most important contributions of the current research is to clearly draw the attention to the importance of tourists' understanding and perception of a destination.

This study implies that LAYAR app as AR application may present and market touristic destinations, but it still occupies a modest and disproportionate position in linking the relationship between AR and the actual one in the minds of tourists and touristic producers. In addition, AR applications using mobile phones open up new tactical horizons to re-create and re-interpret touristic sites from three

important aspects: first, the tourists have the ability to change and choose what they want to see (for example, examine the site from different angles and altitudes, add or remove what might hinder vision without having to move, add or remove some of the assets of the touristic site if the tourist does not wish to see it). Second, these augmented realities that were created become alive when a number of people watch them and experience them without affecting the capacity of the destination. This enables anyone to possess and enjoy whatever he desires at the site. Third, an individual will not be able to actually live the real experience without personally visiting the touristic site. These unique and distinctive components of AR applications for mobile phones allow users (individuals or companies) to create a public and private dialogue correspondence between each other. Many users can create a general content for the same touristic site, in an attempt to help the tourists, reach the desired destination or get access to specific information through AR applications. Others can create replicas or components with a link to the touristic place, which does not exist in reality in order to enable personal contact between each other. Both of these types of practices could be extended further by reviewing the literature to determine the geographical location of the touristic site. Individuals who want to personalize their experience and tell their own personal stories while visiting a touristic site will highlight their own experience of the touristic sites (Humphreys & Liao, 2011).

CONCLUSIONS

The study of tourism reality through modern technological applications, always pushes us to focus on the geographical location as a crucial factor to communicate with and be knowledgeable about the touristic site. It is plain to see for all of us that mobile phones play a role that can be described (Mobile mediating) in that it creates a link which is of paramount importance to acquire experiences, practices, and in the creation of significant links to enable users to get to know

the touristic sites. However, it can be noted that there are tactics and widespread strategies, whether among tourists or touristic producers to create physical spaces. We have seen many examples in the current study for individuals using AR applications using mobile phones in order to integrate their own methodologies, perception and ideas in the touristic site. But they did so using modern technological means to increase and deepen their perception of tourism reality surrounding them.

On the other hand, it is also possible for the responsible authorities to determine and limit individual's capabilities and access when using such applications in the future and these limitations may be imposed without hesitation. These limitations can be in the form of fees or certain boundaries for use of such applications if needed and may take place in the near future.

The positive perception among consumers and producers in AR applications in tourism industry boosts the decisions regarding a potential visit to a touristic destination and increase the level of confidence regarding their visiting plan. The producers can improve the services offered to potential tourists, improve marketing efforts, reach a greater number of potential customers, and exchange their experiences around the world easily. The number of consumers of AR may increase once proper and affordable applications are distributed.

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VISITOR SATISFACTION AS KEY TO SUSTAINABLE LINKAGES IN RWANDA'S TOURISM VALUE CHAINS

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Satisfaction scores could be predictors of visitor expenditure patterns, and updated data on this is meaningful for destination policy and planning in view of sustainable linkages of the local economy to tourism value chains. Visitors' views, attitudes and needs should be monitored continually in destinations. Visitor satisfaction is key for sustainable tourism development in a destination, and also a significant factor affecting visitor expenditure patterns. Tourism research acknowledges that visitor satisfaction often times translates to a loyal client who brings in repeat business. As such, satisfaction can be a variable for enhancing sustainable linkages in tourism value chains. Focussing on Rwanda, we use survey data from a random sample of 3,138 visitors leaving the country through the land borders and the airport, to present a quantitative analysis on visitor satisfaction as a variable for possible sustainable linkages in tourism value chains.

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Keywords: *Visitor satisfaction, Tourism Value chain, Sustainable linkages, Rwanda*

INTRODUCTION

This paper examines visitor satisfaction in Rwanda, captured through visitor motivations, expectations, experiences and choice behaviour, and our analysis recommends opportunities for using visitor satisfaction to enhance sustainable linkages of tourism value chains in Rwanda.

Tourism Value chains in Rwanda

Product offerings for tourism destinations require input from sequential and multiple industry players to create the visitor experience, which is gauged in terms of satisfaction levels. Tourist satisfaction is a post – purchase construct that evaluates how much a consumer likes or dislikes a service or product after purchasing it (Woodside et al, 1989; Kotler, 2001), and this construct is primarily a function of pre – travel expectations (Mountiho, 1987; Kotler, 2001). Industry players form the supply side of tourism in a destination, and are in position to facilitate a balance between visitor’s pre – travel expectations and post purchase experiences in their daily operations. Industry players are integral to the tourism value chain, which basically entails the general steps and the suppliers whom a tourist interacts with from commencement of a trip to the end. In this interaction, a satisfactory visitor experience implies repeat visit and additional economic benefit to a destination. Multiplier effects of such benefits are extensive, given the fact that significant components of tourism’s indirect contribution is the supply chains created in the economy as a result of visitor expenditure. Limitations abound in Rwanda’s local linkages to tourism value chains, where the

sector linkage to the rest of the local economy is weak (Spray and Agarwal, 2016). Thus supply chains should be identified, strengthened and enhanced by involving the local communities and enterprises so as to reduce on leakages in terms of input imports. Generally in Rwanda, tourism suppliers like accommodation providers, tour operators, destinations and tourism communities have notable levels of commitment to satisfaction levels for visitors during the course of their stay in the country.

As an emerging destination in the greater East Africa region, Rwanda's tourism stakeholders have successfully managed to package the destination as a high end ecotourism destination. This strategy gives it a competitive edge, against popular and seasoned safari destinations in East Africa, additionally attracts high expenditure per visitor, and has sustainability focus to safeguard the destinations evolution. Known for its mountain gorillas, Rwanda has diverse other tourism product offerings carefully tailored to appeal to targeted consumer preferences in heterogeneous market segments. These include boating holiday packages, birding and cultural tourism. Rwanda is yet to establish itself fully as a stand-alone destination. Most visitors international extend their visit to the country transiting through neighbouring destinations like Kenya Uganda and Tanzania, all competing for international markets. However, weakened competition from leading attractions in the East Africa nations, gives Rwanda an edge in the region in its appeal for international markets.

Kenya, and Tanzania are known for their beaches, as well as inland wildlife tourism activities. As tourism continued to evolve in these regions, an unstable demand pattern for tourism product offerings was embraced as business as usual. For example, international tourist arrivals at the Kenyan coast is seasonal, with peak and off peak seasons. Such destinations have witnessed sharp decline in visitor arrivals, implying a weakening tourism demand for consumption of product offerings. Among the reasons cited for the decline, is visitor preference for product offerings from other

competitive destinations. In providing a historical analysis of evolution of tourism development in Kenya, Akama (1999) uses the product life cycle (PLC) model to show that up to 1980s, Kenya was an important tourism destination receiving up to 6% of total tourist arrivals in Africa. This was later to be followed by a surprise decline of visitor numbers in the 1990s (ibid). The decline in tourist arrivals is attributed to violation of carrying capacity limits for safari resources (Ikiara and Okech, 2002). According to Ikiara and Okech (2002), the period 1990 to 2000 recorded a stagnation in visitor numbers to national parks and game reserves, at a stagnant figure of 1,500,000 per annum. For both Ikiara and Okech (2002), and Akama (1999), analysis hints at compromised product aspects that repulsed visitors. Product quality, and consequently visitor satisfaction levels is a factor that shapes demand patterns in destinations. However, there is little research on the issue, (Zhang et al, 2010), and this papers examination of visitor satisfaction in Rwanda, adds to the existing body of knowledge on the topic.

Visitor satisfaction impacts on destinations

Studies of visitor satisfaction in tourism illustrate that satisfaction scores impact economies in profitable and competitive measures; and secondly satisfaction scores are influenced by identified variables. Researchers who evaluate impact of satisfaction levels on destination economies, agree that there is a positive correlation between visitor satisfaction loyalty (see Tian-Cole & Crompton, 2003; Tian-Cole et al., 2002; Nowacki, 2009), and that satisfaction is a significant factor in determining expenditure patterns (Kim et al, 2010; Disegna and Osti, 2016).

Tourism research on visitor satisfaction supports the idea of strong connections between satisfaction and loyalty (Tian-Cole & Crompton, 2003; Tian-Cole et al., 2002; Nowacki, 2009; Wang et al., 2009; Zabkar et al., 2009). Improved service quality and satisfaction results in repeat visitation and positive word of mouth

recommendations (Tian-Cole et al., 2002, Lee et al., 2004), implying a boost to consumption of tourism goods which can positively impact on multiple tourism businesses in a destination.

Satisfaction is considered among the variables influencing expenditure by visitors in a destination (Anderson et al, 1994, cited in Zhang, 2010). Client satisfaction assures higher profitability as it often results to loyalty and positive recommendations (Munier & Camelis, 2013), and maximizing satisfaction is crucial for success of tourism businesses in destinations (Sukiman, et al, 2013) .

According to Zhang et al, (2010), there is little research done on visitor satisfaction with destination attributes and expenditure patterns. An analysis between tourist satisfaction and related expenditure categories is essential (Kim et al, 2010), as a key step in planning for strategies to increase visitor expenditure in a destination (Disegna & Osti, 2016). Certainly, study findings by Cardenas et al (2016) find a positive correlation between tourist satisfaction and expenditure at a destination. The authors use these findings to guide the implementation of specific policies by stakeholders in these destinations, in order to increase the economic impact of tourism in the host community. Also, a satisfactory visitor experience also guarantees willingness to pay more by the visitors. Homburg et al, (2005) note that ... *'when customer experience elevated states of satisfaction, they perceive a high outcome of an exchange and therefore are willing to pay more, (p 85).*

Research findings by Disagna & Osti (2016) show that satisfaction with specific characteristics of the destination is significant in affecting visitor expenditure behavior in the willingness to spend, in the amount of money spent within the different visitor expenditure categories, and finally in the total budget spent. In their analysis, one unit increase in satisfaction resulted to 7.6% increase in total visitor spending, and produced about 7% increase in total expenditure in studied destination. The authors however warn that overall satisfaction with a destination *"exerts only a negative effect*

on the amount of money spent on transportation (very likely the more tourists are satisfied with the destination, the less they will travel around in search of new places), satisfaction with the different aspects of the destination exerts an influence on both the willingness to pay and the amount of money spent in the different expenditure categories” (p. 22). Worth noting also, is that “satisfaction with certain characteristics of the trip, like friendliness with local inhabitants, can negatively affect visitor propensity to spend on accommodation and transportation, while satisfaction with prices negatively affects visitor tendency to spend on food and beverage. (ibid, p 16)”.

Of importance is satisfaction and dissatisfaction with tourism product categories in destinations (Disagna & Osti, 2016). Satisfaction with different characteristics of the destination exerts a positive influence on visitor willingness to incur expenditure within different spending categories like accommodation, shopping and tours (Disagna & Osti, 2016). In their study, satisfaction variables that would positively impact on spending categories are safety, landscape, food and beverage, friendliness and price. Here findings reveal that satisfaction with landscape positively affects tourist expenditure with accommodation and transportation, whereas satisfaction in food and beverage positively affects expenditure on transportation. In ranking destination service impact on visitor satisfaction, Chan et al, (2015) show that tour guiding has greatest impact with tour services, whereas leisure activities have the greatest impact on satisfaction with the tour experience. The link between satisfaction and expenditure on product categories is an important factor to be considered in bid to enhance value chain benefits from tourism in a destination.

While in the destination country, tourist expenditure can be apportioned to local transportation (air or ground), lodging, and excursions as key product categories. Previous studies note a direct variation in visitor satisfaction levels and expenditure on these categories (see Chan et al. 2015; Disagna & Osti, 2016).

Accommodation options range across different scales and sizes (boarding and lodging facilities, caravan/camp sites, cottages/villas, eco-lodges, farm stays, guest houses, home stays, hostels, lodges, motels, tented camps, serviced apartments, town hotels, vacation hotels among others). Excursions, on the other hand, are the local activities which are representative of the tourism product and the natural assets of the destination. Many excursion activities are sold by operators and executed by local guides who take on the role of area experts. Retail may also be considered as part of excursions.

Value chains in a destination are significantly sustained by economic aspects, of which visitor expenditure in a destination contributes to. With a positive correlation between visitor satisfaction and expenditure patterns along product categories shown from reviewed literature, satisfaction of tourists in Rwanda is likely to impact positively on tourism service providers along the value chain, where according to National Institute of Statistics Rwanda (NISR, 2011), Hotels and Hospitality was the highest contributor with 45.5%, followed by Restaurant and Mobile food services with 29.1%, and other sub categories include tours and travel, operation of sports, curio, national park management and entertainment. 85% of the establishments are fully owned locally, a guarantee to fortified multiplier effects to the local economy in scenarios of increased visitor expenditure at the destination. This paper therefore links visitor satisfaction in Rwanda, to enhanced multiplier effects to the local economy through quality expenditure at value chain nodes.

METHODOLOGY

A sample survey was used to collect data. An exit survey questionnaire was administered to a random sample of 3,138 visitors leaving the country through the land borders and the airport. A total of 815 visitors, representing 26%, exited the country through the airport while a total of 2323 visitors representing 74% exited through

the land borders. Data was collected on visitor expenditure, as well as visitor satisfaction. 67% of the visitors (exiting through the airport) fell between US\$25,000 and 200,000 income brackets indicating a significant purchasing power. Satisfaction was evaluated based on destination product attributes, as well as individual tourist characteristics. These included satisfaction by gender, length of stay, trip planning period, age group, level of education, and average household income. SPSS application was then used to analyse the data, whose results are presented in tables, graphs and pie charts in subsequent section.

RESULTS

A total of 815 visitors, representing 26%, exited the country through the airport while a total of 2323 visitors representing 74% exited through the land borders. 67% of the visitors (exiting through the airport) fell between US\$25,000 and 200,000 income brackets indicating a significant purchasing power. Taking tourism as a normal good, the anticipated relationship between expenditure and budget covariates is positive (Engstrom & Kipperberg, 2015). Visitors who reported being on business were 837 in total, representing 26.7%, those in transit were 979 representing 31.2% while 626 representing 19.9% were those visiting friends and relatives (VFR). Those visiting for leisure, a total of 322 representing 10.3%, were the least reported. A significant number of visitors engaged in other activities (11.9%) such as faith-based tourism were reported. Over 50% of the visitors were making repeat visits implying the significance of those visiting friends and relatives and on business or transit. In terms of nationality of origin, East Africa Community region accounts for 38.3 %, Democratic Republic of Congo (DRC) for 26.7%, followed by the rest of Africa 5.3%, Europe 15.9%, America 8.3% and Middle East/Asia 5.4%.

With regard to the mode of travel arrangement chosen by visitors, about 1.9% travelled under inclusive tour package arrangements while the rest (98.1%) made their own independent travel arrangements. This trip characteristic is an important determinant of visitor expenditure, (Brida & Scuderi, 2013), though the extent of expenditure varies across multiple studies, and package purchase has minimal impact on local economy. The results further revealed that the visitors' durations of stay were diverse ranging from one day visits to several weeks. About 63.7% of all the visitors stayed for four or less days. On group size, it was established that 67% of the visitors to Rwanda travelled alone. This indicates the magnitude of business and transit visitors (see Table 1).

Table 1: Characteristics of Visitors

Variable	Frequency	Percentage (%)
Mode of Transport		
Air	815	26.0
Land	2323	74.0
Mode of Travel Arrangement		
Package	60	01.9
Free Independent	3078	98.1
Length of Stay (Days)		
0	426	13.6
1	635	20.2
2-4	937	29.9
Over 5	1140	36.3
Purpose of Visit		
Business	837	26.7
VFR	626	19.9
Leisure	322	10.3
Transit	979	31.2

Other	374	11.9
Region of Origin		
EAC	1202	38.3
DRC	838	26.7
Rest of Africa	167	05.3
America	259	08.3
Europe	501	15.9
Middle East/Asia	171	05.4
Group size		
Alone	2059	65.6
2 people	541	17.2
Over 3 people	538	17.1
Income per annum (US \$)		
< 25, 000	122	14.9
25, 000 – 99,999	354	43.4
100, 000 – 199, 000	180	22.1
>200, 000	159	19.5
Frequency of visits		
1	387	47.5
2-4	243	29.8
Over 5	185	22.7

Source: Calculations from Sample Survey

Trip planning

Data reveals that 67% of visitors took three to five months to plan for their trips to Rwanda. This indicates an intensive information search possibly because the destination is relatively unknown to the visitors (see Figure 1). Rwanda's tourism sector needs to leverage on other regional destinations in shortening the information search process and hence reducing the decision making period.

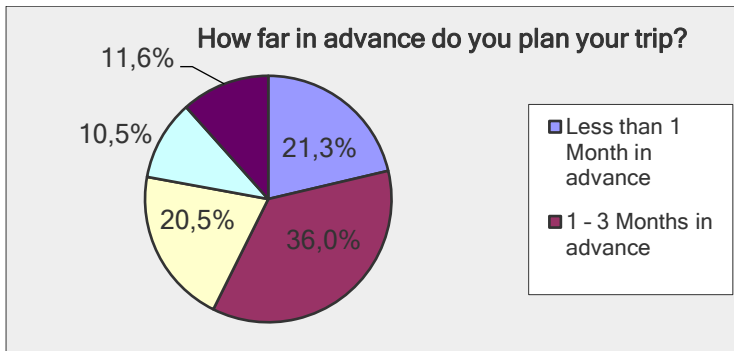


Figure 1: Duration of Trip Planning

According to the sample survey, word of mouth, travel agents and the internet were reported to be the visitors' important sources of information in making travel-related decisions while some third-party sources such as guidebooks, printed media and television were reported to be less useful (Figure 2). This paper, therefore, recommends that travel representatives in the countries or regions of visitors' origin would thus be more effective in marketing Rwanda than sources such as print and sound media.

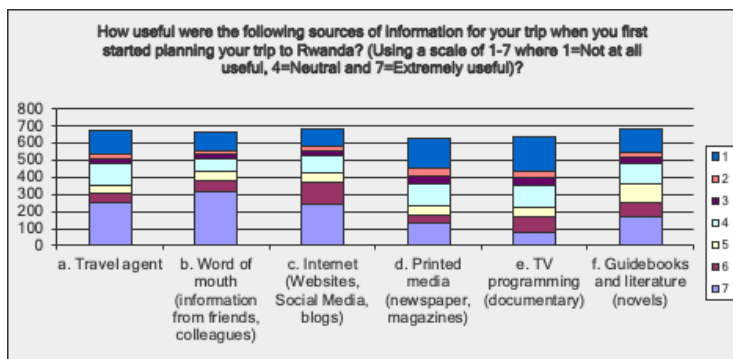


Figure 2: Sources of information

With regard to the factors that visitors considered when selecting trip destinations in the region, safety and security, natural attractions (gorillas, birds etc) and learning experiences were the most highly reported factors by the sample surveyed (Figure 3). The least reported factors were the sun and sand, local cuisine, community events, and local communication/transport.

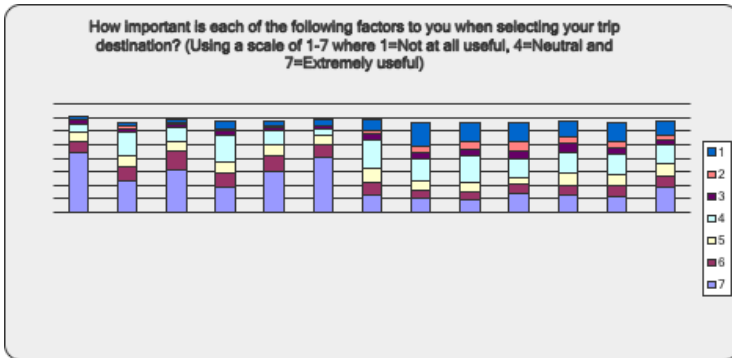


Figure 3: Factors Determining Trip Selection

KEY

- a. Safety & Security
- b. Quality standard (Accommodations, Customer service)
- c. Learning experiences
- d. Value for money
- e. Historical and cultural explorations
- f. Nature explorations (Gorillas, Birds, Flowers)
- g. Local cuisine (Restaurant)
- h. Sun and sand
- i. Community events
- j. Shopping
- k. Convenience and access to local transport
- l. Diversity of outdoor activities (hiking, canoeing, bicycling etc.)
- m. Weather

With regard to the visitors' satisfaction, the knowledge of guides, safety and security, customer service and availability of tourism information was highly rated (Figure 4) while that of hotel quality, service quality and quality of cuisine and language skills was moderately rated. Several studies have found quality to be a critical factor in visitors' expectations and satisfaction. Satisfaction dimensions related to diversity of facilities is a significant predictor of tourist expenditure in a destination (Jurdana and Frleta, 2017). Standardization and accreditation processes across East African Community (EAC) countries should be given a greater priority and more in-depth studies on quality are necessary in the case of Rwanda.

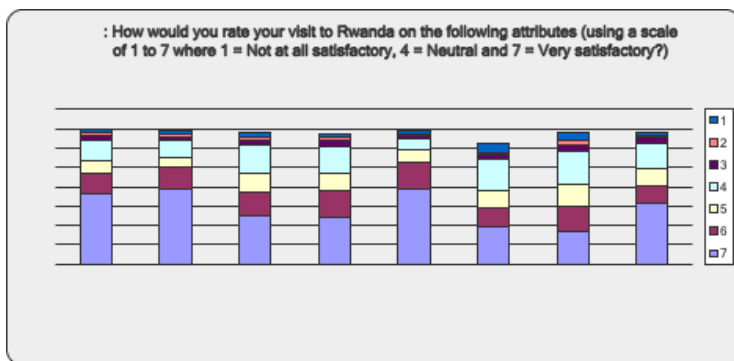


Figure 4: Rating of Destination Various Attributes

Generally, visitors registered satisfaction with their stay in Rwanda. This shows that their experiences exceeded the expectations they had before/during their travelling to the destination (Figure 5). Despite this rating, the quality of service and of cuisine has to be addressed urgently.

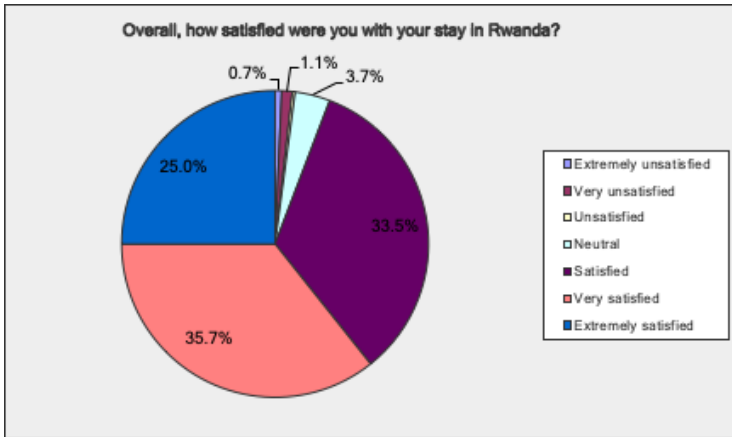


Figure 5: Overall Satisfaction Levels

When the respondents were asked about the activities they would most likely undertake upon return to their countries of origin, they reported that they would share trip experiences with friends and relatives and recommend the destination to networks of friends and relatives. It was also reported that writing trip reports on blogs or advisors with respect to their experiences was unlikely and so the possibilities of visiting again were minimal. However, it was noted that greater satisfaction would result in positive word of mouth/recommendation and so the greater the possibilities of making return visits.

Visitors' satisfaction with regard to the gender variable, shows that the male and female visitors alike were very satisfied with their stay in Rwanda (see Figure 6). However, an analysis of previous research on tourism economics by Brida & Scuderi, (2013) shows that gender as a variable has a non-significant relationship with tourist expenditure.

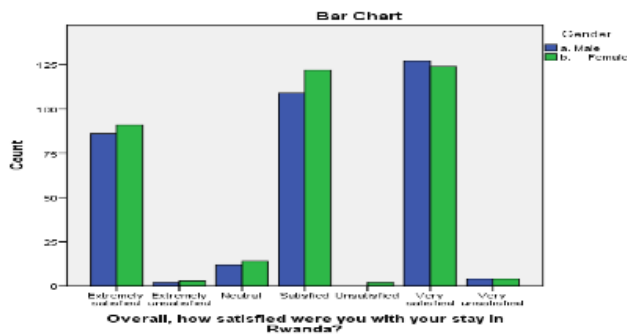


Figure 6: Visitor satisfaction by gender

Most of the visitors who reported staying for more than four days were very satisfied with the destination while those who reported staying for fewer days were averagely satisfied (see Figure 7). Whilst most studies post a significant and positive relation between length of stay and visitor expenditure (Brida & Scuderi, 2013), Roehl & Fesenmaier (1995) provide evidence to approximate the relationship by an inverted *U* curve, increasing up to a determined number of nights and decreasing in later days. Also, Thrane & Farstad (2011) emphasize that the positive effect in the relationship tends to decline as the length of stay increases. For Rwanda, satisfaction scores were highest for visitor category of those spending 1- 3 days, and declined thereafter.

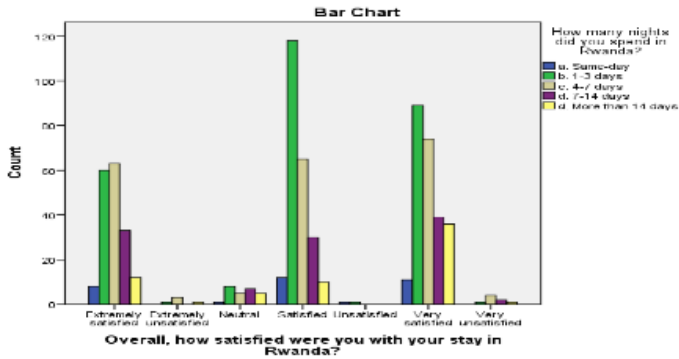


Figure 7: Satisfaction by length of stay

Also noted was the fact that the visitors' satisfaction with the destination seemed to increase with the period taken in planning for the trip. In other words, the more time the visitors took to plan for the tour, the more satisfied they were with the destination (see Figure 8). Taking planning horizon as a study variable, Thrane, (2002), shows a significant and positive relationship between times spend on trip planning and tourist expenditure at destination. While Thrane (2002) uses metric variables, Aguilo et al, (2000), Chhabra et al, (2002) use categorical variables in their analysis, posting similar observations of direct and significant relationship of trip planning to visitor expenditure in a destination. With planning horizon as a common denominator relating to both satisfaction and expenditure, the impression is that satisfaction could be a predictor of expenditure patterns, with a direct variation in this context. Bookings closest to the travelling time are inversely related to tourist spending at the destination (Aguilo et al, 2000), and a similar pattern for our study is highlighted on figure 8 where satisfaction scores for those with a trip planning period of less than one month trail as compared to that of those taking 1- 3 months.

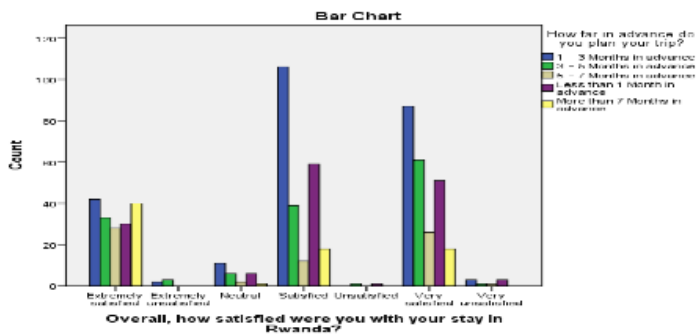


Figure 8: Satisfaction by trip planning period

Visitor's age vis-a-vis their satisfaction level was also investigated. The results of the survey showed that satisfaction by age-group was not distinctive, although the majority of the visitors between 36 and 45 years reported being just satisfied with the destination (Figure 9). Most of those in the age groups below 36 and above 45 years of age showed greater satisfaction.

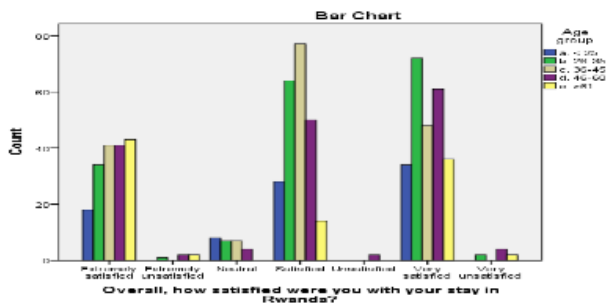


Figure 9: Satisfaction by age group

With regard to the visitors' level of education, it was noted that the visitors with diploma/degree qualifications reported greater satisfaction with the destination than those with lower ones (Figure

10). Findings by Olya & Mehran, (2017) show that education as an indicator did not have significant effect on tourism expenditure, whereas Brida & Scuderi (2013) posit that education repressors were marginally significant in the group of heavy spenders tourists.

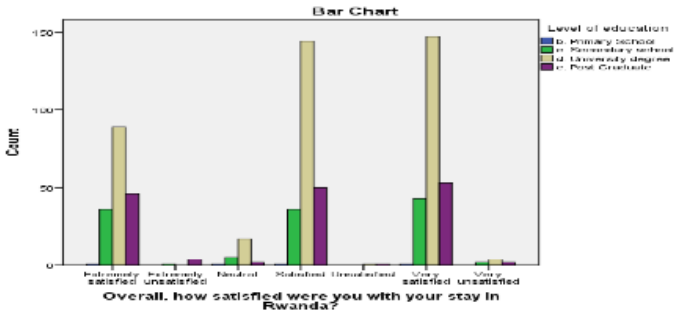


Figure 10: Satisfaction by level of education

In respect to the satisfaction level by average annual household income, the results in this study indicated that the visitors in the middle income bracket were generally less satisfied than those in the lower and higher income brackets (Figure 11). This may imply that the destination meets the expectation of low and high income visitors in contrast to the middle class visitors. Middle class visitors may have had very high expectations to be met. This calls for more realistic marketing and advertisement of the destination. Previous research revelations on relationships between income and expenditure on tourism goods (see Downward & Lumsdon, 2000, on the direct relationship between income and expenditure; Brida & Scuderi, 2013, on centrality of economic theory in conditioning purchasing behaviour). In both studies, expenditure on tourism goods is restricted within budgetary confines of individual income. Visitors in a higher income bracket would spend more on tourism goods, and our field data shows that this category also posts higher satisfaction scores as relates to their visitor experience at a destination.

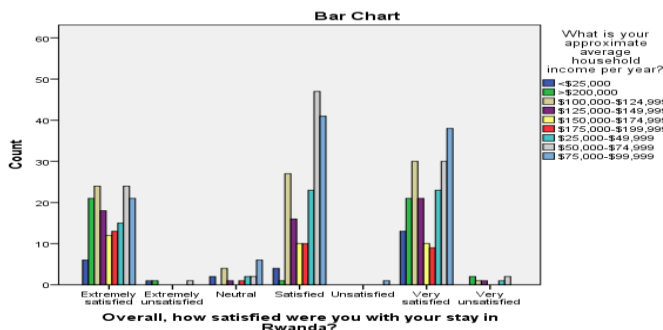


Figure 11: Satisfaction by average household income

Visitor expenditure on tourism goods covered accommodation, food and beverage, shopping, transportation and culture. This spending contributed to Rwanda's tourism earnings, which is meaningful for the country's Gross Domestic Product (GDP), employment and investment opportunities. In 2013, Rwanda's Travel and Tourism sector attracted capital investment of Rwandese Francs (RWF) 95.9billion (i.e. 8.5% of all total investments at 1128.2 billion) in the country. The sector also directly supported 66,500 jobs (3.1% of total economy employment of 2,145,161) while the total contribution to employment was 8.1% i.e. about 174,500 jobs. Tourism's indirect contribution to employment was about 69,000 jobs while the induced contribution was 39,000 jobs. Rwanda's Travel & Tourism contribution to GDP could be broken down into direct (39.5%), induced (19.6%) and indirect (40.9%) components (WTTC, 2014). Indirect contribution is the sum of supply chain (23%), investment (15.5%) and government collective spending (2.3%).

DISCUSSION

Akin to Disagna & Osti, (2016), important variables for tourism satisfaction in Rwanda as a destination were found to include landscape, safety and product attributes at destination. Visitor satisfaction levels from the survey data are average, implying a room

for improvement in enhancing satisfaction indicators at the destination.

Tourism workforce development is an area for improvement that can enhance visitor satisfaction in Rwanda. Being able to meet international customer's standards is key. Skills preparation for work force can be through short training for low skill position, as well as formal education. Workers can additionally be trained for technical and safety requirements of excursions and tour guides should have training in natural asset knowledge.

Visitor preferences also motivate product improvement. Visitors constantly demand tourism products that provide a deeper and more meaningful experience. Rwanda thus needs to develop niche tourism products, and brand key tourism products like wildlife, adventure, resort, and Meetings Incentives Conference and Exhibition (MICE).

Study findings show that 67% of visitors to Rwanda spend three to five months to plan for their trip, and this intensive information search is occasioned by the fact that the destination is relatively unknown to visitors. This paper recommends the digitalization of the processes in tourism, travel, hospitality and catering industries. This would help in developing, managing and marketing tourism products. Adoption of Information Communication Technologies (ICT) will not only enable quick and accurate identification of visitors' needs but will also reach visitors with comprehensive, personalized and up-to-date products that satisfy their needs.

Visitors in Rwanda were generally satisfied with tourism, except for its value for money. Current priority area for Rwanda's tourism development is adding value to tourism products. Adding value is driven by the need to augment the current tourism products so as to enrich the visitor's experiences. Potential avenues to be explored in this bid would include, interpretive tour guiding, and development of alternative tourism activities e.g. initiate agri tourism and agro tourism. As a result, the destinations tourism products will be more competitive, and visitors will be guaranteed greater satisfaction. Thus, with regard to the upgrading of tourism products, this paper suggests the need to improve the quality of tourism products through the following initiatives:

i) Addressing negative impacts

Policies should be strengthened to curb any negative impacts on tourism such as environmental degradation. Visitor-carrying capacity

of national parks and other nature-based attractions should continue to be monitored and the number of visitors regulated to avoid overcrowding and degradation of the natural beauty of the resources and the capacity of attractions should also be tabulated from time to time using empirical ecological data (such as temporal and spatial distribution and density of flora and fauna in the parks, territorial size of the parks and physical terrain) and social indicators (such as visitor attitudes and behaviour).

ii) Variety of tourism products

Since the tourism sector can still offer a wider variety of products, there is a need to expand the products by incorporating new attractions and augmenting the existing ones. This would ensure the development of high-value products that yield a diverse and distinct visitor experience. To achieve this, more emphasis should be put on the establishment of niche products such as cultural home-stays, water based sports on Lake Kivu and on some of the large rivers traversing the country, cable cars and mountain hiking, agro-tourism, avi-culture etc.

iii) Product development

The main goal of diversifying tourism products is to increase revenue. Diversification is also necessary for the following reasons: a) Over reliance on gorilla tourism is creating environmental conservation concerns, b) Length of stay for international visitors is brief, generally four to eight days for most visitors, c) There is relatively low share of visitors visiting for leisure as compared to those for business

iv) Development of high quality tourism and hospitality management skills

Studies in the past indicate that visitors perceive service to be of low quality, excessively overcharged and of low value for money. In a bid to remedy this situation, Work Force Development Authority (WDA) is offering courses in Technical and Vocational Education and Training (TVET) institutions to promote artisan or technical skills in the sector. These include culinary art, housekeeping, front desk operations, and waiters' service related course. University courses on offer include: Bachelors of Hotel and Restaurant management, Bachelors of Travel and Tourism Management and certificates in House Keeping, Front Office/Reception Techniques, Kitchen Operations,

Restaurant Services/ Food and beverage services, Tour Guiding and Administration, Tour and Travel Operations, Airline Cabin Crew/ Air Hostesses, Exhibition and Event Management and Customer Care.

CONCLUSION

Satisfaction was a crucial variable in the present study. Satisfied visitors help in sustainable marketing of a destination through positive word of mouth and post-trip engagement. Generally, most visitors were satisfied with Rwanda's tourism product except its value for money. There is need, therefore, to promote value for money rather than price as the measure of visitor satisfaction and to encourage interpretive tour guiding. Further branding of tour products is necessary in order to differentiate them from those of alternative destinations in the region. Therefore, adding value is driven by the need to augment current tourism products so as to enrich the experiences of visitors. In turn improved experiences would exceed expectations and consequently guarantee satisfaction. Visitors' views, attitudes and needs should be monitored continually.

Visitor expenditure in Rwanda was on tourism goods, and this generated tourism earning that contributed both directly and indirectly to GDP, employment and investments. Satisfaction was a crucial variable in the present study, and exhibited a relationship with visitor expenditure. Satisfied visitors help in sustainable marketing of a destination through positive word of mouth and post-trip engagement. Generally, most visitors were satisfied with Rwanda's tourism product except its value for money. There is need, therefore, to promote value for money rather than price as the measure of visitor satisfaction and to encourage interpretive tour guiding. Further branding of tour products is necessary in order to differentiate them from those of alternative destinations in the region. Therefore, adding value is driven by the need to augment current tourism products so as to enrich the experiences of visitors. In turn improved experiences would exceed expectations and consequently guarantee satisfaction, which has direct and significant relations with expenditure patterns.

Trip satisfaction scores could be predictors of visitor expenditure patterns, and updated data on this is meaningful for

destination policy and planning in view of sustainable linkages of the local economy to tourism value chains. Visitors' views, attitudes and needs should be monitored continually in destinations.

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ECONOMIC CRISIS AND GREEK CRUISE SECTOR FINANCIAL ANALYSIS

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In this study we analyze the tendencies of the cruise sector in Greece during the last eight years -in which the economic crisis predominates. The financial ratio analysis shows that cruise sector in Greece has been facing a downward tendency from 2008 to 2014, with serious financial problems. Our case study is the Cypriot cruise company Celestyal Cruises (former Louis Cruises), which reflects to a considerable extent the Greek cruise market, since it has operating offices in Greece and pays taxes to the Greek state.

The results of the financial analysis for the years 2007–2014 show that total Assets and Liabilities have decreased over the eight years of study. Revenues declined to 70% and Operating results to 45%. Return on Equity and Return on Assets declined rapidly, up to -60% and -11.60% respectively, and Liquidity ratios have worsened in 2014 (between -40% to -70%). The Net Profit in 2007 turned rapidly in the following years, to Net Losses, up to -33,95%, which were constrained in 2012, 2013, and even more in 2014 (-0.45%), while Interest expenses increased to 260% by 2014.

Keywords: *financial analysis, cruise sector, economic crisis, Greece.*

JEL: G140, L830, M100

THE CRUISE MARKET IN NUMBERS

Cruise tourism is one of the most dynamic sectors of modern tourism, with prospects of continuous and rapid growth playing an important role in the economies of the countries where it has developed (Diakomihalis et al., 2009; Vaggelas & Stefanidaki, 2015). The cruise industry began to develop in 1980 and has continuously expanded worldwide. However, it is not necessarily growing with the same pace in all countries of Europe and likely not in Greece.

During 2014, there were 42 cruise lines domiciled in Europe, operating 123 cruise ships with a capacity of around 146,000 lower berths. Another 60 vessels with a capacity of around 89,000 lower berths were deployed in Europe by 18 non-European lines. The vast majority of these cruises visited ports in the Mediterranean, the Baltic, and other European regions, generating 29 million passenger visits at a total of around 250 European port cities, a decrease of 7.1% from 2013. In addition, an estimated 14.4 million crew also arrived at European ports. As a result of the European cruise operations and the investment in new cruise ships by the global cruise industry, this industry generated significant economic impacts throughout Europe (ECC, 2015).

The world economic crisis appears to affect individual markets of the cruise industry, mainly those that are supported by the clientele markets of countries that have suffered important consequences of the crisis. Within the framework of this reflection, the investigation of the course of the Greek cruise industry over the last eight years is attempted.

According to Cruise Lines International Association's (CLIA) European 2015 Economic Contribution Report, the cruise industry's

economic output in Europe reached a new record of €40.2 billion in 2014, up 2.2% from the previous year, and included €16.6 billion in terms of direct expenditures by the industry. Greece is the third most popular destination in the Mediterranean, with 4.075 million passenger visits in 2014: 14.1% of the total cruise passenger visits to Europe (CLIA Europe, 2014). Despite its high ranking, Greece has not succeeded to materialize its attractiveness into similar revenues as the country was eighth place in 2014 with regards to the cruise industry's direct expenditures at €506 million, a 3.05% share of the total (2014), according to figures released by the ECC (<http://news.gtp.gr>). Greece serves primarily as a destination market with some cruise maintenance activities. The cruise industry in Greece created 10,136 jobs with an estimated €190 million in total compensation for employment.

Table 1 presents the direct expenditures of the cruise sector in Greece for the years 2008 to 2014:

Table 1: Direct Expenditures of the Cruise Sector in Greece, 2008 - 2014							
	2008	2009	2010	2011	2012	2013	2014
Direct expenditures (in million €)	471	598	580	605	588	574	506
Share of Total Europe	3.3%	4.30%	4.00%	4.00%	3.80%	3.55%	3.05%

Source: Authors' elaboration of European Cruise Council (ECC) data, 2008- 2014

Table 2 presents the passengers embarkations in Piraeus for the years 2008–2014:

Table 2: Piraeus Home Port, 2008-2014, Passengers embarkations						
2008	2009	2010	2011	2012	2013	2014
1.290.000	1.500.000	1.210.000	1.560.000	1.198.047	1.302.581	1.055.556

Source: ECC, 2009 - 2014

The objective of this paper is to analyze the evolution of the Greek cruise market over the last eight years. Since there are no Greek owned cruise operators and Louis Cruises (renamed to Celestyal Cruises) is the Cypriot cruise company which has operating offices in Greece and pays taxes to the Greek state, it is considered the only Greek cruise company, despite flying the flag of Malta. Besides it is the only cruise company that offers both itineraries in the Aegean and Ionian seas with homeporting Greek ports, and itineraries in the Mediterranean with homeporting in Cyprus or Italy, which produces approximately 60% of cruises in the context of the Greek market. For all the aforementioned reasons, we select the case study of Celestyal Cruises financial analysis. The purpose of the analysis is to reveal how Celestyal Cruises (Louis Cruises), which reflects to a considerable extent the Greek cruise market, is affected by the economic crisis in Greece and by the overall cruise market economic development.

THE CRUISE SECTOR IN GREECE

The cruise industry in Greece consists of programs including Greek ports as part of Mediterranean cruise itineraries, and cruises mainly in the Greek territory of the Aegean and Ionian seas (Diakomihalis, 2009). The Greek cruise market is considered part of the East Mediterranean market, including four destinations: 1) Aegean Sea; 2) Black Sea; 3) Eastern Mediterranean (Cyprus, Holy land, Egypt); and 4) Venice, Adriatic, Ionian Sea. Piraeus is one of the seven leading European ports with respect to embarkations, with 1,055 million passenger embarkations in 2014 (ECC, 2015).

The number of passengers that disembarked on Greek cruise destinations from circular cruises that homeported in Greece increased in 2009, declined in 2010 almost to the level from 2008, but showed remarkable increase in 2011, which exceeded the level of 2009. The duration of stay of the cruisers at the Greek ports ranged

from 5–6 h (Katakolo, Iraklio) to 9 h (Corfu), and 10 h (Rhodes, Piraeus). Of them, 20% of the cruisers (17 of the 84 recorded cruisers) remained at the port of Piraeus for at least 24+ hours (Diakomihalis, 2009; Diakomihalis et al., 2009:9).

In terms of employment, there were 10,136 jobs attributed to direct, indirect and induced work activity in the cruise sector, for 2014, and 11,215 jobs for 2013, accounting for 3.3% of the total 348,930 jobs in the cruise industry in Europe, and 2.9% of the 339,417 jobs in the cruise industry in Europe, respectively. Approximately 23.5% of these jobs were in manufacturing, 19.2% were in Financial and Business services, 12.5% were in the transportation sector and the remaining 45% in all other sectors.

METHODOLOGY

The methodological approach constitutes a financial analysis of the producers of Greek cruises, evaluating the asset structure, capital structure, liquidity, activity, and efficiency. The frame of reference required for our analysis is grounded on recent years' evolution of the main economic values of the cruise industry in Greece.

The focus of our study is on Celestyal Cruises as it is reflecting the Greek cruise market. Data were obtained from the consolidated financial statements including the five cruise ships owned by Celestyal Cruises, former Louis Cruises group. This is considered a main limitation of the present study, since there are a lot more cruise firms offering itineraries in Greece, which though, have neither any financial obligation to the Greek state nor significant effect on the GDP of Greece.

The study period selected is from 2007, the last year before the economic crisis trigger, up to 2014. In 2014 the economic crisis remained, and, with the same severity as the previous five years in Greece.

FINANCIAL ANALYSIS

The basic accounting figures for this period of study are presented per account aggregated in the following table:

Table 3: Consolidated Statement of Financial Position 2007 – 2014 (in thousand €)								
Assets								
Accounts	2007	2008	2009	2010	2011	2012	2013	2014
Deposits	34.130	14.680	15.020	29.680	11.650	20.330	18.620	19.570
Receivables	42.560	55.030	49.510	52.640	61.760	46.690	48.700	20.560
Other assets	32.150	40.600	27.100	26.500	82.960	57.600	55.250	30.940
Vessels, property & equipment	517.080	617.170	643.930	593.730	467.930	457.360	443.360	474.150
Non-current assets	84.950	85.870	87.000	94.980	88.000	86.030	85.920	87.370
Total Assets	710.870	813.350	822.560	797.530	712.300	668.030	651.860	632.600
Liabilities & Equity								
Accounts	2007	2008	2009	2010	2011	2012	2013	2014
Total Equity	293.390	245.830	255.020	236.980	137.510	100.440	71.530	64.650
Trade & other payables	41.940	59.970	54.570	58.620	66.730	60.920	55.890	30.460
Other liabilities	88.000	124.960	100.040	121.840	163.930	160.220	188.220	194.000
Borrowings	143.990	313.710	340.150	311.460	281.680	110.620	98.750	104.260
Non-current liabilities	143.550	68.880	72.780	68.630	62.450	235.830	237.470	239.230
Total equity & liabilities	710.870	813.350	822.560	797.530	712.300	668.030	651.860	632.600

From the above Table 3 we derive some very important and interesting information concerning the influence of the economic crisis on the Greek cruise sector, and specifically how the Assets, the Liabilities and the Total Equity have been affected during the eight years of the study:

- ✓ Large drop in cash flow in 2008. Besides, cash has increased sharply in 2010 to pursue a more significant drop in 2011 and a nearly constant position in the next three years.

- ✓ The level of Receivables followed a mixed trend with continuous variations to reach the highest point of the eight years in 2011 and the lowest in 2014.
- ✓ Ships are the greatest part of the assets and showed an upward trend until 2009 and decrease in 2010. The value appears almost stable during the next four years, mainly because of the economic crisis that has pushed down the value of assets. Two vessels were excluded in 4 of the 8 years of the period under investigation due to the fact that the “Aegean Pearl” in May 2010 and the “Aquamarine” in December of the same year changed owner and geographical area of activity.
- ✓ The fall in value observed in owners’ equity from 2011 onwards is noteworthy. This is mainly due to capitalisation of accumulated losses from previous years.
- ✓ Liabilities toward suppliers show a slight upward trend up to 2011 and in subsequent years, which are reduced almost by half.
- ✓ Within the eight-year period, other short-term liabilities have increased more than twice.
- ✓ Long-term bank debt had increased significantly by the year 2010, while it was reduced in the last four years, to a lower level than that of 2007.
- ✓ Non-current liabilities show significant reduction up to 2011. The opposite happened from 2012 to 2014.

The development of the basic values of the profit and loss statement is presented below:

Table 4: Consolidated Income Statement 2007 – 2014								
Accounts	2007	2008	2009	2010	2011	2012	2013	2014
Revenue	314.750	273.160	267.590	275.670	244.290	193.890	205.170	226.850

Expenses	257.960	233.070	207.390	219.780	198.330	157.200	154.370	164.900
Operating profits	56.790	40.090	60.200	55.890	45.960	36.690	50.790	61.950
Finance expenses	23.940	25.100	29.330	23.120	25.330	25.800	25.080	25.330
Loss for the year	13.290	-31.140	-13.510	-10.240	-82.940	-40.190	-29.530	-1.030

Table 4 gives some very important and interesting information concerning the Income, the Earnings and the Losses of the Greek cruise sector as they are depicted during the eight years of the study and under the influence of the economic crisis:

- ✓ Revenue derived largely from cruise ticket sales reached in 2012 the lowest level of the eight years, while the last two years show slightly recovery. This is due firstly to the sale of two cruise ships and, on the other hand, the forced dislocation of another ship because of political turmoil in Egypt. A series of unfortunate affairs in the summer of 2011 in Athens and Piraeus (strikes) have also been affected negatively, as well as the intensity of competition across the Mediterranean.
- ✓ In 2011 there was a notable reduction in operating costs, which continued up to 2014.
- ✓ Financial expenses (payments for interest on loans) is relatively stable throughout the eight years.
- ✓ The operating profitability (profit before tax, interest and depreciation, EBITDA) during the whole period under examination remained at satisfactory levels and at a relatively stable level.
- ✓ 2007 is the one and only financial year with net profits. The rest of the seven years showed steady losses, reaching in 2011 the highest value of almost 83 million euros, mainly due to non-operating results and exceptional provisions for debtors

and for settlement for a vessel purchase, totalling approximately 20 million euros. A continuous decrease in losses followed in the upcoming years that reached its minimum in 2014.

FINANCIAL RATIO ANALYSIS

The major financial ratios of the company are calculated, presented, and assessed in the following section. The time period of the analysis is the years 2007–2014.

Ratios of assets' structure

The ratios of assets structure of the cruise industry for the period under examination, are given in the following table:

Table 5: Ratios of assets' structure (in %)								
	2007	2008	2009	2010	2011	2012	2013	2014
Fixed asset ratio	84.70	86.40	88.90	86.40	78.00	81.34	81.20	88.76
Fixed to current asset ratio	553.20	702.80	797.80	632.90	355.50	535.97	531.78	889.98

The fixed asset ratio until 2010 followed a constant trend, varying around 85%. This value is very high and shows the difficulty in assets liquidation. In 2011 the ratio fell to 78% despite the reduction of assets, due to the sale of two cruise ships and the impoverishment of the value of the remaining, as a consequence of the economic crisis. Similarly, the ratio of fixed-to-current assets is characterized by a corresponding trend, while in 2011 the ratio is reduced in nearly half compared to the previous year, but reached its highest value in 2014. The very large values of the ratio, which are far higher than 100%,

show that the industry is clearly fixed-asset intensive, although the purpose of the industry is the provision of services.

Capital structure ratios

The following ratios have been estimated:

Table 6: Ratios of Capital Structure (in %)								
	2007	2008	2009	2010	2011	2012	2013	2014
Leverage	142.30	230.90	222.50	236.50	418.00	565.10	811.31	878.50
Financial autonomy	41.30	30.20	31.00	29.70	19.30	15.04	10.97	10.22
Foreign capital stress	58.70	69.80	69.00	70.30	80.70	84.96	89.03	89.78
Debt interest coverage	237	160	205	242	181	142	203	245

The leverage ratio shows the extremely high exposure to foreign borrowing. It is consistently greater than 100% and shows the high dependence on foreign capital. Leverage has been growing steadily in all of these years, and in 2014 after the capitalization of high losses attributed to the economic crisis, the ratio has skyrocketed to 878%. This raises serious risks and questions for future funding in view of the economic crisis and the resulting difficulty in gaining access to bank lending. If the industry seeks new capital, it will be forced to turn to its shareholders. The sector seems to have exhausted the scope of financing and certainly would require another rationalization in the administration of leverage.

The above conclusions are reinforced by the analysis of the ratio of financial autonomy, as well as its additional ratio of foreign capital stress. These ratios show the small degree of dependence of the industry from equity capital. The downward trend that continued up to 2014 intensifies the concerns and certainly requires action in order to increase the degree of autonomy and reduction of foreign capital stress.

Throughout this bleak shape for the capital structure of the cruise industry as indicated by the leverage and economic autonomy ratios, the debt interest coverage ratio highlights the contrast. For the eight-year period under review the industry manages to cover the interest payments from operating profitability and thus succeeds not to pose a far greater risk to the credit rating of the sector.

The positive impression of the industry in this area is reflected in the depiction of debt interest coverage earned by operating profits. However, it is not enough to reverse the unfavourable image in regards to the capital structure, which is in poor condition. Financial autonomy in 2014 has fallen four times compared to 2007, and foreign capital stress has increased 50% for the same period of time.

Liquidity ratios

The liquid ratios of the sector for the period 2007 – 2014 are presented in the following table:

Table 7: Liquidity ratios								
	2007	2008	2009	2010	2011	2012	2013	2014
General liquidity	0.84	0.60	0.59	0.60	0.68	0.68	0.56	0.50
Current liquidity	0.59	0.38	0.42	0.46	0.32	0.30	0.28	0.18
Cash liquidity	0.26	0.08	0.10	0.16	0.05	0.09	0.08	0.09

The general liquidity ratio is continuously worsened through the whole period under review. The ratio takes values well below the unit and it is far away from a satisfactory value. In fact, if the conclusions drawn from the above analysis of the leverage are taken into account, it is likely very possible to encounter serious difficulties if it is necessary to repay short-term liabilities.

The sufficient amount of inventory stocks reduce even more the cash ratio liquidity reflecting the fact that the liquidity problem is even more acute.

The cash liquidity ratio reflects a similar image with very low liquidity in relation to the short-term liabilities, except for the year 2007. In the case where liabilities will become immediately due, major problems will appear in repaying them.

Summarizing the above analysis, it becomes obvious that the liquidity problem is very serious for the total period of eight years.

Activity ratios

The activity ratios under study are presented in the following table:

Table 8: Activity ratios								
	2007	2008	2009	2010	2011	2012	2013	2014
Inventory turnover ratio	9.79	7.51	7.90	10.29	4.46	2.76	3.64	5.26
Days of inventory stay	37	49	46	35	82	132	100	69
Receivables turnover ratio	7.40	5.00	5.40	5.20	4.00	4.15	4.21	11.03
Days of receivables stay	49	74	68	70	92	88	87	33
Debtors turnover ratio	7.50	4.60	4.90	4.70	3.70	3.18	3.67	7.45
Days of credit	49	80	74	78	100	115	99	49
Asset Turnover Ratio	0.44	0.34	0.33	0.35	0.30	0.29	0.31	0.36
Owner's Equity Turnover Ratio	1.10	1.10	1.10	1.20	1.80	1.93	2.87	3.51
Cash Turnover Ratio	38	42	40	27	75	105	87	53

There is the conservation of inventory that is manageable, and thus manageable to satisfactory use. The number of days required for recycling inventory is small. The effective or ineffective use of inventory is not sufficient evidence of the effectiveness of the overall management, since the analysis concerns service providers.

Receivables turnover ratio follows a general downward trend up to 2011, followed by an upward trend from 2011 to 2014. This is reflected in the increase of the number of days, followed by a drop to a minimum of 33 days, required to receive claims from customers,

demonstrating the change in the receivables collection within the eight-year period.

The debtors' turnover ratio has been reduced for the seven out of the eight-year period of study, but increases in 2014 to the level of 2007. Respectively, the days of credit had increased up to 2012 and reached down to the levels of 2007 in the last year.

Receivables turnover ratio is greater than debtors' turnover ratio with the exception of 2007. This shows a positive situation for the industry, since the time required for the payment of suppliers is longer than the time of collecting claims from customers. Thus, the management of short-term assets and liabilities is satisfactory.

The asset turnover ratio kept falling from 0.44 in 2007 to 0.29 in 2012, mainly because of the large increase in assets after 2008 and the subsequent non-raising of the revenue. In the last two years the ratio increased and almost reached the level of 2007. Nevertheless, the values of the ratio cannot be described as highly satisfactory in the intensity of assets used in the industry.

On the other hand, sufficiently high is the Owner's Equity Turnover Ratio with an extraordinary increase from 1.10 in 2007, 2008 and 2009 to 3.51 in 2014. However, this increase is not due to an improvement in sales but mainly to a substantial fall in the value of the denominator, i.e., capital. Thus, the theoretically good trend is rejected in practice because of the causes that led to this trend.

Finally, the Cash Turnover Ratio followed by a constant downward trend until 2010, which is due mainly to the increase in the days of credit and an upward value in 2011 and 2012, which continued in 2013, to decline again in 2014. This increase shows the consequences of the economic crisis and cash shortage, while the reduction marks the beginning of the sector recovery.

Profitability ratios

The profitability of a company is of high and direct interest of its shareholders as well as its creditors and employees.

The profitability ratios, which have been calculated and analyzed in this work are:

Table 9:1 Profitability ratios (in %)								
	2007	2008	2009	2010	2011	2012	2013	2014
Gross profit margin	18.00	14.70	22.50	20.30	18.80	18.92	24.76	27.31
Net profit margin	4,22%	- 11,40 %	-5,05%	-3,71%	- 33,95 %	- 20,73 %	- 14,39 %	- 0,45%
Return on Equity (ROE)	4.50	-12.67	-5.30	-4.32	-60.32	-40.01	-41.28	-1.59
Return on Assets (ROA)	1.90	-3.83	-1.64	-1.28	-11.64	-6.02	-4.53	-0.16

The first observation concerns the maintenance of positive gross profit results throughout the eight years. After the fall of 14.70% in 2008, an upward trend followed to result in greater value in 2014, at 27.31 %. Therefore, the management over time might be considered satisfactory and the cost of the services provided might be considered as efficiently used for the sales volume.

Nevertheless, the other sizes of profit and loss account are not sufficient to maintain the operating profitability for the industry. So, with the exception of 2007 all other financial years resulted in losses. Therefore, the other three profitability ratios have been calculated for the other years just to reflect the level of losses.

DISCUSSION - CONCLUSIONS

The results of all financial years, with the exception of 2007, were loss-making. Losses peaked in 2011, although this was due in

large part to an exceptional provision against risk of non-recovery. However, throughout the period in question noted operating profitability (positive gross profit), sufficient to cover financial liabilities.

The analysis of the financial ratios showed some significant structural problems of the sector, such as the difficult situation of liquidity for the whole period. The short-term liabilities exceeded constantly the current assets. The industry operated with negative working capital, which is very difficult in general, but particularly for a services supplier sector.

In direct connection with the adverse liquidity is the very high leverage observed. Foreign capital outweighs constant owners' equity with the gap getting wider and culminating in 2014 following a capitalization of past year's losses. The difficult stock market situation due to the economic crisis does not leave much room for the increase in share capital, which may lead the industry to an extremely difficult position in the case of required additional funding. Due to the failure of banks to finance companies with high degree leverage, the options of restructuring capital structure of the industry should be considered.

The use of the assets and liabilities of the sector is relatively satisfactory. This has the effect of creating a positive time gap between receipts from customers and payment liabilities to suppliers. The cash turnover ratio is also considered satisfactory.

Generally, the analysis showed that the industry in this area is obviously influenced more than in other regions by the crisis. The losses continued from 2008 onwards and peaked in 2014. The liquidity is recorded in difficult level while the high leverage leaves no scope for access to bank lending in the future, and the credit risk of the industry gradually deteriorating.

The industry of the Greek cruise is already and remains to be facing the consequences of the economic crisis. The economic circumstances have affected the contraction of the industry, which has

been reflected by the reduction of the fleet offering itineraries in the Aegean and Ionian seas. The market value of active cruise ships has also fallen to clear negative effect on fixed assets.

As mentioned earlier, the case study of only one cruise company is a significant limitation of this research, even though it might be considered the only company connected to the Greek cruise sector. On the other hand, it is not possible to include any financial data from the fifteen other firms offering itineraries in Greece, since their ownership and taxation status concerns different countries and required data are neither obtainable nor comparable.

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PILOT TOURISM SATELLITE ACCOUNTS FOR GREECE: RESULTS, ISSUES AND NEEDS

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This paper summarizes the main results and data issues of the first Tourism Satellite Accounts (TSA) pilot project for Greece, which is one of the few countries in Europe which still have not developed TSA, depriving policy makers and the scientific community of a highly relevant tool for measuring tourism's direct economic impact. The EU funded project involved the documentation of available data sources relative to their consistency with TSA-concepts, identification of data gaps, and recommendations for improvements. From establishing the TSA-Tables, total expenditures of inbound, domestic, outbound and internal tourism as well as their structure by consumption categories are defined, which constitutes the first step to measure the impact triggered by tourism demand. The results show how crucial it is for tourism analysis to properly measure all components included in tourism consumption, and to separately treat overnight from same-day visitors, parameters which are not yet considered in current practice of Greek tourism statistics.

Keywords: *Tourism Satellite Accounts (TSA), tourism expenditure, tourism statistics, pilot exercise, Greece, data issues.*

INTRODUCTION

Tourism Satellite Accounts (TSA) are an internationally accepted framework for the measurement of tourism's direct impact on the economy. Greece is one of the few countries in Europe that still has not developed TSA, despite the fact that tourism is a significant driving force for the Greek economy. Thus policy makers and scientific community are deprived of an important and, given the current economic crisis, urgently needed measurement tool.

Studies on special visitor activities (Diakomihalis and Lagos 2008; Diakomihalis 2007)ⁱ, theses (Hatzimarinakis 2011; Giannopoulos 2010; Diakomihalis 2006), evaluation reports (Zacharatos 2004) and experimental approaches at local and regional level (the example of Hersonissos Municipality in Creteⁱⁱ; Giannopoulos and Boutsinas 2014, pp. 7) have been undertaken so far, but never has a fully-fledged TSA been developedⁱⁱⁱ. More importantly, a previous attempt for the establishment of a national TSA^{iv} was conducted during 2006-08 under a EU funded programme^v, yet never reached the level of successfully rendering the accounts operational (Hackl, P. and Hatzimarinakis, S. 2017a^{vi}).

During 2016-17, a pilot project for the compilation of a Greek TSA was held under the Structural Reforms Support Service (SRSS) provided by the EU^{vii}. The objective was to evaluate the available data sources in terms of their consistency with TSA-concepts, to perform a pilot compilation of the core TSA-Tables and to suggest the appropriate institutional agent for a routine-wise implementation. The project involved a close collaboration with main data producers, namely the Hellenic Statistical Authority (ELSTAT) and the Bank of

Greece (BoG), along with the examination of international experience (Eurostat 2009a; Eurostat 2009b; Eurostat 2014; UN 2016) using as framework reference the most recently revised standards for TSA (UN, et al. 2010 (herein referred to as TSA:RMF 2008)) and tourism statistics (UN and WTO 2010 (herein referred to as IRTS 2008)). The main output consists of the comprehensive documentation of TSA-relevant database including related gaps and deficiencies, of proposals for improvements of these data, and of pilot TSA-Tables related to tourism consumption of the year 2015. The pilot character of the tables is due to the fact that certain data issues are not resolved and hence some of the used data are provisional; final TSA-Tables compiled in the future might differ in some results from the ones obtained in this project.

An important output of the pilot project is the enhancement of the apprehension to what extent TSA requirements are met. The main issues of concern related to the TSA-relevant database and feasible treatments are discussed. An analysis of tourism expenditures based on the TSA-Tables 1 to 4 is presented. Results show how crucial it is for tourism analysis to properly measure all components of tourism consumption such as the international transport of passengers and the imputed value of using owned vacation homes, and to separately treat overnight from same-day visitors. Finally, the necessary steps are discussed for transforming the pilot exercise into a routine-wise TSA for Greece.

THE SCOPE OF TSA FRAMEWORK

TSA is an extension of National Accounts (NA) (European Commission et al. 2009, par 29.89-29.101; European Commission 2013, par. 22.123-22.129), a framework for the measurement of various economic variables (production, consumption, capital investment, income, and other). Tourism data are dispersed within NA, and TSA, operating as a satellite, gathers all related data for

measuring direct effects of internal Tourism Consumption (CT), i.e., the immediate effects on macroeconomic variables of the (additional to that of the resident) demand for goods and services activated by tourism.

According to TSA:RMF 2008, TSA consists of the following ten tables:

Table 1: Inbound tourism expenditure by products and classes of visitors

Table 2: Domestic tourism expenditure by products, classes of visitors and types of trips

Table 3: Outbound tourism expenditure by products and classes of visitors

Table 4: Internal tourism consumption by products

Table 5: Production accounts of tourism industries and other industries (at basic prices)

Table 6: Total domestic supply and internal tourism consumption (at purchasers' prices)

Table 7: Employment in the tourism industries

Table 8: Tourism gross fixed capital formation of tourism industries and other industries

Table 9: Tourism collective consumption by products and levels of government

Table 10: Non-monetary indicators

Product analysis is based on the degree of relevance for tourism consumption; products typically included in tourism consumption are defined as *Tourism Characteristic Products* (TCP)^{viii}.

The activities that typically produce TCPs as their principal output are defined as *Tourism Characteristic Activities* (TCA). A tourism industry is composed of all establishments that serve visitors directly and whose main activity is a particular TCA.

The international TSA framework identifies 32 activities (4-digit codes of Nace Rev2^{ix}) and 76 products (6-digit codes of CPA 2008^x) for international comparison (Hatzimarinakis 2011, appendix 2).

Country-specific TCP and TCA which are characteristic for tourism consumption particularly in the country of reference may also be included in the analysis of products and activities.

Also included are all other consumption products and activities that are not considered as tourism characteristic, *Tourism Connected Products* (TCnP), which do not comply to the TCP criteria yet are of importance for tourism analysis, and *Non-Tourism Related Products*, which refer to all other consumption products supplied in the economy. Additionally, included are non-consumption products; *valuables* that might be acquired by visitors during their trips.

COMPILATION OF TSA-TABLES FOR GREECE: GENERAL REMARKS

Discussed are the most crucial issues concerning the compilation of the TSA-Tables, such as the available breakdowns of expenditures and products based on existing data and proposals for improvement, components and issues to be taken into consideration in order to precisely measure inbound and outbound tourism expenditures from the Greek Balance of Payments, the treatments applied on various issues, such as domestic expenditures in outbound trips, same-day visitors and reservation services, and important issues remaining to be resolved, such as the measurement of imputed value for accommodation on own account and tourism shares.

In the TSA project, priority was given to compile the core tables for the evaluation of tourism's economic contribution to Greece; a pilot exercise was conducted for TSA-Tables 1 to 6. Based on the availability of the most recent and comprehensive data, 2015 was decided to be the reference year for the pilot exercise. The main data sources for the Greek TSA-Tables are:

- the Balance of Payments (BoP) and in particular the Travel Item and Transport Item for Passengers; the Frontier Survey and the

Cruise Survey are used for the compilation of the former. These sources are used for TSA-Tables 1 and 3.

- Survey of Qualitative Characteristics of Resident Tourists (Vacation Survey (VS) until 2014 and as such referred to in this report) as the main source for TSA-Table 2,
- Household Budget Survey, used for further product breakdown in TSA-Tables 2, 3, and 4,
- Supply-Use Tables, base for TSA-Tables 5 and 6.

Owner of the Balance of Payments data is the Bank of Greece, ELSTAT that of the other sources.

Available Breakdowns And Proposals For Improvement

Breakdowns of expenditures from demand side statistics and of product and activities from supply side statistics are available, yet in a form and quality that does not fully match TSA requirements. This affects the structure of all TSA-Tables.

In particular, regarding **demand-side statistics** the following breakdowns of expenditures are provided:

- The *Vacation Survey* (VS) provides a breakdown of total domestic and outbound expenditures into a) accommodation, b) restaurants, cafes, bars, etc., c) transport, d) recreational and sport activities, e) cultural activities, f) purchases of various goods. Further breakdowns have been proposed within the TSA-project to ELSTAT, e.g., inclusion of a residual category of expenditures, a refined breakdown of purchases of goods between edible and non-edible retail goods.
- In the *Frontier Survey* (FS), total inbound and outbound expenditures are broken down into a) accommodation, b) restaurants and bars, c) transportation (local), d) recreational, cultural and sport activities, and e) purchases and other expenditures (goods and services). It should be noted that expenditures *made in destination* and *in the home country* prior

of departing for the trip are separately treated in the FS methodological framework. The latter expenditures are evaluated as a lump sum after having deducted all expenditures that are not attributed to the destination economy. A modeling procedure was recommended within the TSA project to define the components included in this lump sum based on the distribution of overnights over the different patterns of answers in the relative questions of the FS questionnaire. The application of this procedure results in a plausible structure of expenditures made in the home country; these relate to *accommodation* and *other services* (car rental, guided tours etc.). Due to the fact that this part of the expenditures is based on a modelling procedure, totals for a) *accommodation*, b) *transportation* and c) *recreational, cultural and sport activities* may be over- or underestimated to a rather limited extent. This lump sum accounts for one third of the total inbound and almost 10% of total outbound expenditures. Outbound expenditures are further broken down in the TSA-Tables by HBS factors, as discussed below. No respective information is available for inbound expenditures, limiting the possibility of a more detailed analysis; supplementary research should provide further details.

- The *Household Budget Survey* (HBS) provides an analytical breakdown of domestic and outbound expenditures regarding a) accommodation (e.g., rented dwelling, hotels, rented rooms, camping), b) food and beverage serving services (restaurants, café-cafeterias-pâtisseries, fast food, etc.), and c) transportation (detailed rail, road, sea, air transportation). These household consumption factors are derived from section D for overnight tourism trips in HBS and are useful to obtain a more precise allocation of expenditures to the various broad categories of the TSA product classification. Further breakdowns on additional consumption categories have been proposed to ELSTAT, mainly

regarding *Recreational and sporting services* (COICOP-HBS^{xi} 09.4.1) and *Cultural activities* (COICOP-HBS 09.4.2).

Concerning the **supply-side statistics**, the most analytical *Supply and Use Tables* (SUT) of the year 2015 (provisional) have been used, providing a breakdown of 80 activities and 130 products, used as data input for TSA-Tables 5 and 6. Yet, further breakdowns are required in order to comply with the TSA classification of TCPs and TCAs; e.g., passenger services separated from freight services are not available. This needs to be elaborated by the national account experts of ELSTAT using a suitable structure, e.g., one obtained from *Structural Business Statistics* (SBS) for transport services. TSA-Tables 5 and 6 remain in a preliminary stage; further development requires the input of background information which is available in the national account division of ELSTAT.

Due to the lack of appropriate breakdowns of expenditures, the following two categories of products are possible to be distinguished in the TSA-Tables:

- a) *Internationally Comparable Tourism Characteristic Products (TCP-IC)*, as defined by the TSA classification of TCAs and TCPs
- b) *Other Products*, which include other consumption and non-consumption products supplied by the economy, i.e. *Country-Specific Tourism Characteristic Products of Greece (TCP-GR)*, *Tourism Connected Products (TCnP)*, *Non-Tourism Related Products* as well as *Non-consumption products (valuables)*, which need to be further investigated in order to be distinguished.

Future specification of country specific categories, such as *TCP-GR*, and *TCnP* will result in a further breakdown of *Other Products* in the TSA-Tables according to TSA specifications.

A respective but not exhaustive list of products and related activities has been proposed within the TSA-project, as a base for further investigation. Regarding *TCP-GR*, for goods the list includes

the retail trade services of souvenirs and arts (CPA 2008: 47.00.69);
for services, proposed are:

- a) rental services of sea and coastal water vessels for passengers with operator (CPA 2008: 50.10.20),
- b) rental services of passenger air transport equipment with operator (CPA 2008: 51.10.20),
- c) rental and leasing services of water transport equipment (CPA 2008: 77.34.10), and
- d) rental and leasing services of motorcycles, caravans and campers (CPA 2008: 77.39.13).

As *TCnP*, it is proposed to specify

- a) urban and suburban transportation services (CPA 2008: 49.31.1 and 49.31.2),
- b) retail trade services of automotive fuel (CPA 2008: 47.00.81), and
- c) bridges and tunnel operation services (CPA 2008: 52.21.23), i.e. tolls.

Significant Issues For The Measurement Of Tourism Expenditures From The Greek Balance Of Payments

Policies based on traditional estimates of tourism expenditures are likely to be misguided, as significant parameters of tourism measurement are not considered in current practice. For precise measurement of total inbound and outbound tourism expenditures from the Greek BoP the following three issues should be taken into account.

- INCLUSION OF INTERNATIONAL PASSENGER TRANSPORT SERVICES IN EXPENDITURE MEASUREMENTS

Prevailing practice in Greece for measuring inbound and outbound tourism expenditure is to solely consider the *Travel Item* data of the

BoP, omitting to include the value of *International Passenger Transport Services*, that is BoP's receipts and payments on transport services to and from the destination, respectively; this part of tourism expenditures is allocated to the destination economy and is separately recorded in the BoP. Not accounting for the international part of transport services misreports the actual volume of total receipts and payments due to tourism; for the year 2015, these services account for 9,3% (1.442,7 mio €) of total inbound and for 36,2% (1.153,6 mio €) of total outbound expenditures. Their contribution significantly affects the average expenditures per overnight and per individual trip as illustrated in below tables.

Table 1: Inbound Travel Expenditures			
2015	Only Travel Receipts	Receipts for Travel + Int. Passenger Transport Services	Δ in %
Average per overnight	75,1 €	83,5 €	11%
Average per individual trip	540,9 €	596,2 €	10%
Total expenditures (in mio)	14.125,8 €	15.568,5 €	10%

Table 2: Outbound Travel Expenditures			
2015	Only Travel Payments	Payments for Travel + Int. Passenger Transport Services	Δ in %

Average per overnight	50,3 €	85,4 €	70%
Average per individual trip	323,9 €	507,2 €	57%
Total expenditures (in mio)	2.037,4 €	3.191,0 €	57%

SEPARATION OF NON-VISITORS FROM TRAVELLERS

The BoP framework records transactions between residents and non-residents, irrespective of whether a traveller is considered a visitor or not; both *Travel* and *Transport* refer to the broader definition of traveller; transactions of non-visitors such as boarder and seasonal workers as well as students and patients staying at destination longer than a year, should be deducted from the BoP *Items* in order to comply with the TSA specifications of the “visitor” definition. Due to lack of appropriate data non-visitors cannot yet be distinguished in the pilot TSA-Tables for Greece. Starting with 2016, the *Frontier Survey* questionnaire contains a question for identifying boarder and seasonal workers; this will offer a good base for a proper treatment in future.

- SEPARATE TREATMENT PER CLASS OF VISITORS-TRAVELLERS

Another crucial issue for more precise measurements in expenditure analysis is to separately treat classes of travellers, in particular the overnight and the same-day travellers. Without doing so, current practice misreports the particular contribution of overnight travellers, which are in the focus of the dominant tourism research and decision making in Greece. A per class segregation of data shows great variation in expenditure averages compared to a common

treatment, as shown below in Table 3 and Table 5. This is due to a much higher share of same-day travellers on the number of trips than on the expenditures; *same-day* and *cruise travellers* account for 4% of total inbound expenditures (receipts), yet for 15% of total inbound trips, and *same-day travellers* account for 6% of total outbound expenditures (payments), yet for 50% of total outbound trips.

Treatment Of Same-Day Visitors' Expenditure Structure

Same-day visitors have a significant impact on visitor flows in Greece; a special treatment needs to be applied; as mentioned above, a common treatment of same-day and overnight visitors results in misreporting average expenditures per overnight and per trip.

According to VS dataset, expenditures of same-day visitors in domestic trips account for 21% (0.4 bn €) of total domestic tourist expenditures (1.9 bn €) in Greece. The structure yet of expenditures over the products is not available from the TSA-relevant sources (VS and HBS), posing limitations to the compilation of TSA-Table 2. When such case occurs, it is widely acceptable in international good practice and is also applied in the Greek case, to assume that same-day visitor has the same expenditure habits as the overnight visitor, yet with some necessary adjustments; consumption structure of same-day visitor is defined by:

- a. not accounting for accommodation expenditures,
- b. applying appropriate transport treatment, in particular excluding expenditures on non-land transport means (it is reminded that HBS factors are used to further breakdown transport expenditures of the overnight visitors), and
- c. assuming, due to lack of information, that no reservation services^{xiii} are involved in same-day visits.

Regarding outbound trips, a structure of same-day travellers' expenditures over the consumption categories is obtained from the FS dataset. For a further product breakdown, expenditure factors from

the HBS for outbound trips are applied. Special care is needed for transportation services, as in the case of domestic same-day visits. Within the adaptation procedure of the same-day expenditure structure, in order to be consistent with the conceptual framework of *Travel Item*, it is necessary to exclude any COICOP-HBS code related to outbound trips that corresponds (or may correspond) to international passenger services, which are not recorded in the *Travel Item*, or does not (or may not) correspond to a *resident to non-resident* transaction, which is out of the scope of the BoP. Additionally, no domestic expenditures in outbound trips are included in Greek TSA-Table 3 due to lack of relevant data, which shall be provisional until further investigation.

Main Issues Remaining To Be Resolved

Remaining to be compiled are also the other tables of TSA (7 to 10). Data sources are available for TSA-Table 7 (employment), such as Erganis (information system of the Ministry of Labour), Social Security Institution (IKA) and Labour Force Survey of ELSTAT, as well as for TSA-Table 10 (non-monetary indicators), such as the registers kept by the Ministry of Tourism (register of tourism enterprises - MHTE) and the Hellenic Chamber of Hotels, but need to be reviewed and configured according to TSA specifications. TSA-Table 8 regarding *Tourism gross fixed capital formation* and TSA-Table 9 for *Tourism collective consumption* are being experimentally compiled worldwide and may be investigated at a later stage after a study on international experience.

For the compilation of TSA-Tables 1 to 6, the core objective of the TSA-project, the most crucial issues are presented below.

- TREATMENT OF RESERVATION SERVICES (RS) AND RESIDENCY OF SERVICE PROVIDERS

TSA requires that services typically provided by travel agencies, tour operators and other providers of reservation services (RS), should be treated separately from the rest of tourism consumption services that are purchased through their intermediation as this affects the breakdown of products and the global value of tourism consumption by form of tourism (TSA:RMF 2008, annex 3).

In the compilation of the TSA-Tables, such treatment for RS has been applied where related information was available. The obtained values, however, are underestimated to an unknown extent, because:

- The VS misreports expenditures on products that have been intermediated, yet a refined approach of the issue via existing questionnaire structure regarding the reservation mode may render the distinction of RS from the rest of the services feasible.
- The FS makes such deductions following its own standard methodology. In particular for package trips paid in visitor's home country; from the package tour's total costs (as declared by the respondent), 10% (the percentage agreed upon within the TGT^{xiii}) are deducted for the payment of the various services supplied^{xiv}. However, RS are not deducted from the expenditures made in destination; these correspond to 66% and 9% of total travel receipts and payments, respectively, as no related information is provided in the FS dataset. The issue needs to be further investigated.

Summarizing, open issues for further investigation regard both the identification of the RS gross margin, as well as the residency status of service providers; expert opinion, administrative data and mini surveys are options to be considered for resolution. In the pilot tables, lack of information has led to a simplified yet provisional approach regarding the residency of RS providers; all RS in inbound trips are assumed to be non-residents and all RS in domestic and outbound trips as residents. This approach is followed by other countries as well in cases where no reliable information is available. It should also be noted that no treatment has been applied in the case of non-resident carriers providing scheduled domestic flights; this should also be

included in future investigation. According to TSA specifications, related expenditures, though activated within domestic trips, should actually be allocated to outbound expenditures.

- EVALUATION OF IMPUTED VALUE RELATED TO VACATION HOMES

Measurements in other countries show that other components of tourism consumption (measured in column 4.2 of TSA-Table 4), of which one component is the imputed rent for using owned vacation homes, contribute significantly to the broader notion of tourism consumption. These components have an average share on Total Internal Tourism Consumption ranging from about 10%-15% (France, Spain, Slovakia, Finland, Estonia, Poland) up to 30% in some cases (Italy) (Hackl, P. and Hatzimarínakis, S. 2017b, pp. 20-22; Eurostat 2013, pp. 16; Eurostat 2017, pp. 18).

An appropriate treatment of the imputed value of user owned vacation homes is a significant issue for the Greek TSA, as this type of accommodation is used by a substantial 17% of both domestic and inbound visitors according to VS and FS datasets. Regarding the case of residents, HBS can be the source of information for estimating the imputed rent for secondary dwellings either owner occupied or provided free of charge or at a reduced rent. A precise estimation will depend on an appropriate distinction of vacation homes from other secondary homes. An estimation of the respective imputed value for non-residents is very crucial and also remains to be resolved.

- RECONCILIATION OF DEMAND AND SUPPLY AND DEFINITION OF TOURISM SHARES

The confrontation and reconciliation between domestic supply and internal tourism consumption is in the core of TSA methodology. TSA-Table 6 is where such reconciliation is made; tourism shares are defined as the share of internal tourism consumption in each component of supply. The total value of internal tourism consumption

of a particular product equals the value of all tourism shares for that product supplied by various activities, either domestically produced or imported. Based on these shares, the TSA indicators which measure the direct economic impact of tourism, are defined, viz. *Tourism Ratio* on total domestic supply of products^{xv}, *Tourism Direct Gross Value Added* (TDGVA)^{xvi} and *Tourism Direct Gross Domestic Product* (TDGDP)^{xvii}.

Based on the provided analysis of 80 activities and 130 products of the Greek SUT 2015 (provisional), codes directly corresponding to TCPs and TCAs or including them due to lack of further breakdown have been identified and distinguished, following the structure of the TSA-Table as recommended in TSA:RMF 2008. The TSA-Table 6 needs to be completed by the national account experts of ELSTAT who possess all the necessary background information for the complex procedure of reconciling tourism consumption and domestic supply and properly distributing tourism shares over the various components of supply; guidelines for such a task have been provided by the TSA-project according to the TSA:RMF 2008 specifications.

EXPENDITURE ANALYSIS AND RELATED DATA BASED ON THE PILOT TSA-TABLES

This section summarizes the main results of the pilot TSA-Tables for Greece and the related database. Expenditures by the forms of tourism and classes of visitors/traveller, related expenditure structures by product, as well as the number of overnights and trips are in the focus. A simplified version of TSA-Tables produced in the TSA project is available in a dropbox link created for public use (see Hackl, P. and Hatzimarinakis, S. 2017c).

For a better understanding of the presented results, it is recalled that inbound and outbound expenditures actually refer to travellers, as non-visitors cannot yet be distinguished from the tourism related items of the BoP. It is also noted that the numbers of inbound and outbound overnights in Table 3 and Table 5 do not coincide with those

published on BoG's website; BoG assigns one overnight to each same-day visit^{xviii} for reasons of rendering calculations feasible.

For the year 2015, the total internal tourism expenditures in Greece amounted to 17.466 million €. The share of inbound expenditures accounted for 89% of total (15.569 mio €) and of domestic expenditures for 11% (1.898 mio €). Outbound expenditures amounted to 3.191 million €.

In inbound travel, as shown in Table 3, overnight travellers account for 85% of trips and 96% of expenditures. Yet same-day travellers record a higher average spending per day (99 vs. 82 €). The average duration of trips is 8.3 days for overnight travellers. It is noted that overnights of inbound cruise travellers refer to those outside the cruise ship, on Greek territory before embarkation; the *Travel Item*, which is one of the main sources, does not record overnights on ships as cruise carriers are dominantly owned by non-resident enterprises and the non-resident to non-resident transactions are out of the scope of both the BoP and the TSA.

International comparison shows that the **average expenditure per overnight trip** recorded in Greece (678€) is one of the highest among European countries, yet the **average expenditure per night of overnight trip** (82€), an indicator of the spending capacity of visitors, is one of the lowest; this controversial performance is due to a prolonged length of stay (8.3 days), which is higher in Greece compared to other countries. Average expenditure on same-day trips is also one of the highest among European countries (Hackl, P. and Hatzimarinakis, S. 2017b, pp. 17-19; Eurostat 2013, pp. 11; Eurostat 2017, pp. 12).

Table 3: INBOUND TRAVEL – main figures

2015	Overnights (in thousands)	Average Exp. per Overnight	Trips (in thousands)	Average Exp. per Trip	Total Expenditures (in mio)

Overnight Travellers	183.509	81,6 €	22.081	678,0 €	14.971,7 €
Same-day Travellers	-	-	1.519	98,9 €	150,2 €
Cruise Travellers	2.985	149,6 €	2.515	177,6 €	446,6 €
TOTAL	186.493	83,5 €	26.114	596,2 €	15.568,5 €

Regarding domestic tourism, Table 4 shows that the overnight visitors contribute a 78% to total domestic tourism expenditures, yet account for only 28% of total domestic trips as same-day visits are dominant. Average duration of the overnight trip is 11.8 days. It should be noted that the average expenditure per overnight is very low compared to that of the inbound overnight traveller, which may predominantly be explained by the following two facts:

- a) the reduced capacity for spending due to the negative effects of the economic crisis on salaries and wages, and,
- b) the widespread use of non-market accommodation as the main type of accommodation; according to VS data, 75% of overnight visitors use non-market accommodation, the 42% of which relates to owned vacation homes and the 33% to accommodation provided for free by relatives or friends.

Compared to other countries (58%), Greece records a very low share (11%) of domestic tourism expenditures over internal expenditures. Due to the fact that domestic expenditures on domestic trips are not separately reported from domestic expenditure on outbound trips in international reports for TSA, in combination with the fact non-monetary data (number of trips and overnight stays) only cover trips/stays in the country of origin, no reliable international comparison is available regarding average domestic expenditures per

trip/overnight (Hackl, P. and Hatzimarinakos, S. 2017b, pp. 19-20;
Eurostat 2013, pp. 14; Eurostat 2017, pp. 15-16).

Table 4: DOMESTIC TOURISM – main figures

2015	Overnights (in thousands)	Average Exp. per Overnight	Trips (in thousands)	Average Exp. per Trip	Total Expenditures (in mio)
Overnight Visitor	61.415	24,2 €	6.224	238,3 €	1.483,6 €
Same-day Visitor	-	-	15.874	26,1 €	414,3 €
TOTAL			22.098	85,9 €	1.897,9 €

In outbound travel, the overnight travellers contribute to total outbound expenditures far more substantially than the same-day travellers (94% as opposed to 4%), even though they have an equal share in the total number of trips. Additionally, the average duration of an overnight trip is 9.9 days. Average expenditure per overnight is equal to that of the inbound traveller. The fact that average expenditure per trip is higher compared to inbound travellers does not by any means denote that Greek traveller spends more: the respective values include international transportation to/from Greece, which is mainly carried out by non-resident carriers; such interactions between the travellers and the carriers are recorded in the Greek BoP and TSA when made by residents in outbound trips as a resident to non-resident transaction, yet not recorded in the Greek Statistical System when made by inbound travellers as a non-resident to non-resident transaction, since the domestic economy is not the final beneficiary.

Compared to other countries (Eurostat 2013, pp. 17; Eurostat 2017, pp. 20), Greece records an average performance regarding the

average expenditure per same-day trip (58€), per night of overnight trip (81€) and per trip (507€).

Table 5: OUTBOUND TRAVEL – main figures

2015	Overnights (in thousands)	Average Exp. per Overnight	Trips (in thousands)	Average Exp. per Trip	Total Expenditures (in mio)
Overnight Travellers	37.351	80,5 €	3.163	951,1 €	3.008,6 €
Same-day Travellers	-	-	3.128	58,3 €	182,4 €
TOTAL			6.291	507,2 €	3.191,0 €

The significance of TSA lies upon the identification of the related products and their share on total expenditures, which provides the fundamental step to determine tourism's contribution not only to the overall economy but also by product when tourism consumption is compared with the supply side-statistics; this task remains to be completed in TSA-Table 6. Available breakdown of expenditures of the Greek TSA database is presented in Table 6.

In inbound expenditures, the structure of overnight is very different from that of same-day visitor/traveller; *accommodation* and *food and beverage serving services* account for 63% of the expenditures of overnight travellers, while half of the expenditures of the same-day travellers is made for purchases of goods and of services other than those identified as *TCP-IC*.

The share of *other products* is also crucial in the case of domestic expenditures, which include mainly purchases for goods; according to the VS, *purchases for food, drinks, souvenirs etc.* account for about a quarter of the expenditures of overnight visitors. For both overnight and same-day visitors the low share for transportation as well as for

accommodation due to the use of owned vehicle and vacation home is characteristic. Dominant is the share on *food and beverage serving services*.

In the outbound expenditure structure, only about one third of the expenditures made by overnight travellers are allocated to *accommodation and food and beverage serving services*; according to FS, about half of the outbound overnights are made in owned vacation homes or in accommodations provided by relatives or friends without charge. *TCP-IC* account for three quarters of total expenditures of overnight travellers, while in the case of same-day travellers they have a fairly equal share with *Other Products*.

Table 6: Expenditure structure in TSA-Tables by form of tourism and class of visitor/traveller						
2015	TSA-Table 1 Inbound expenditures ^(*)		TSA-Table 2 Domestic expenditures		TSA-Table 3 Outbound expenditures	
<i>Class of visitor/traveller</i>	<i>OV</i>	<i>SDV</i>	<i>OV</i>	<i>SDV</i>	<i>OV</i>	<i>SDV</i>
Accommodation services	49,2%	30,9%	16,5%	X	16,8%	38,4%
Food and beverage serving services	14,2%		35,8%	43,8%	15,2%	
Railway passenger transport services	20,4%	16,3%	0,3%	0,6%	0,0%	0,5%
Road passenger transport services			0,9%	1,7%	1,3%	4,4%
Water passenger transport services			5,2%	0,0%	0,2%	3,4%
Air passenger transport services			3,2%	X	37,4%	X

Transport equipment rental services			0,3%	0,6%	0,8%	0,5%
Travel agencies and other reservation services	0,0%	X	1,6%	X	0,0%	X
Cultural services	3,5%	1,6%	0,6%	0,7%	2,6%	8,3%
Sports and recreational services			1,0%	1,3%		
Internationally Comparable Tourism Characteristic Products (TCP-IC)	87,3 %	48,8 %	65,4 %	48,6 %	74,3 %	55,5 %
Other Products (**)	12,7 %	51,2 %	34,6 %	51,4 %	25,7 %	44,5 %
OV = Overnight Visitor (actually traveller for inbound and outbound expenditures)						
SDV= Same-day Visitor (actually traveller for inbound and outbound expenditures)						
X = Does not apply						
(*) Not including expenditures of cruise visitors, as no breakdown by product is yet available for them.						
(**) <i>Other Products</i> includes other consumption and non-consumption products supplied by the economy.						
Any discrepancies between the sum of the individual components and the related totals are due to the rounding of figures.						

Regarding the presented breakdowns, the following should be kept in mind to better evaluate structures:

- a. The share of transport services, and as a consequence *TCP-IC*, of inbound expenditures is not comparable with that of

domestic and outbound. HBS factors, which provide a further product breakdown, have been applied to the latter; this has allocated a significant part of transport-related expenditures (25% in outbound, 64% in domestic) to the category of *Other Products*. These expenditures regard *urban and suburban transportation services, fuels* for rented or owned vehicles and *tolls*, which are not considered as *TCP-IC*; these are defined as *TCnP* in TSA-Tables 2 and 3.

- b. Expenditures on accommodation services may also include food and beverage serving services sold under a unique price (e.g. accommodation with half-board, etc.).
- c. RS net evaluation still remains an issue to be further refined as described above. Thus, *Travel agencies and other reservation services* is misrepresented in structure of all forms of tourism; RS gross margin is not yet well separate from intermediated services mainly concerning accommodation and transportation.

CONCLUSIONS

For policy makers, TSA is highly relevant because it allows a detailed analysis of the actual expenditure and the patterns of consumption made by tourists and same-day visitors. TSA in combination with Input-Output analysis offers a solid base for measuring overall tourism effects and monitoring inter-industrial technological relations and leakages from the production structure due to imports; this latter is crucial to be determined and monitored for the Greek economy with permanent deficits in the balance of trade^{xix}.

On the technical level, the TSA-project has laid the basis that would allow ELSTAT the routine-wise implementation of TSA in Greece. Additionally, the awareness of the related data issues among producers and users of tourism statistics has substantially increased as

deficiencies of the TSA-relevant database have been indicated and proposals have been provided to amend the available database. Yet further work on the TSA-Tables has to be conducted by ELSTAT. The next steps in establishing TSA for Greece must deal with the adaptations of the TSA-related databases in order to resolve weaknesses and fill gaps following the clarification of open questions and inconsistencies. It should be noted that the scope of the main data sources, if different from that of TSA, such as in the case of the FS, may pose a limitation to the extent to which proposals made within the TSA project may be easily adopted. Other factors such as budgetary or contract issues regarding the operation of the existing sources must also be taken into account.

The TSA-project has proved that the cooperation of experts from the relevant institutions such as ELSTAT, Bank of Greece and Universities can produce good quality tables as internationally defined in TSA:RMF 2008. The fact that TSA are an extension of national accounts and that most of data and statistics which are necessary for TSA are in the portfolio of the Greek national statistical institute renders ELSTAT the logical and only candidate for operating routine-wise the TSA in the future; international experience shows that National Statistical Institutes are predominantly responsible for TSAs (Eurostat 2013, pp. 9; Eurostat 2017, pp. 10). This would also require a close inter-institutional cooperation with other agents and stakeholders as producers or users of tourism statistics. It is of crucial importance that regular, annual workshops on tourism statistics will be organized under ELSTAT in order to guarantee a continuously improving quality of tourism data and hence of TSA results.

TSA shall annually provide politics, the public administration, the businesses, the academic community and the public of Greece with statistics that they need for assessing tourism's direct economic impact. TSA is particularly helpful for policy makers in the current situation of economic crisis.

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ⁱ Based on the OECD TSA framework (OECD 2000)

ⁱⁱ See <http://www.hersonisos.gr/municipal/tourism/tourism-satellite-accounts.html>

ⁱⁱⁱ WTTC's *Travel and Tourism economic impact analysis reports* (claimed in previous years to be a product of "simulated TSAs") for Greece are not mentioned, as their research on countries do not constitute a TSA and should not be considered a TSA replacement, as denoted in their website's methodology section (see <https://www.wttc.org/economic-impact/country-analysis/methodology/>)

^{iv} Based on the first EC-OECD-UN-WTO TSA framework (Commission of the European Communities et. al. 2001)

^v The project was developed as part of the overall project *Development and Operation of an Integrated Information System (IIS) for Strategic Tourism Planning: Tourism Satellite*

Account (TSA) and Observatory, EU-financed within the Operational Programme Information Society of the 3rd Community Support Framework.

^{vi} The specific report as well as the rest documentation of the SRSS project files is available at the official site of Ministry of Tourism (<https://mintour.gov.gr/doryforos-logariasmos-toyrismoys-dynatotites-kai-anagkes/>) under the title *Tourism Satellite Accounts: Potentials and Needs* as well as by the authors.

^{vii} Beneficiary agent of the Structural Reforms Support Service was the Greek Ministry of Tourism. More specifically, the TSA project was undertaken within the framework of the EU-funded *Technical Assistance action to support tourism planning and policy for the promotion of sustainable tourism development in Greece*, and particularly within the Activity I.1.1: "Develop monitoring and reporting tools for Greek tourism: a national accounting and statistical system" of the Component 1, "Tools for strategic policy making".

^{viii} The criteria for characterizing a product as a TCP are analyzed in IRTS 2008, par. 5.10

^{ix} NACE, the official statistical Classification of Economic Activities in the European Community – From the French, Nomenclature Statistique des activités économiques dans la Communauté européenne. The Revision 2 is the latest used.

^x CPA, the official statistical Classification of Products by Activity in the European Economic Community. The 2008 version is the latest used.

^{xi} COICOP-HBS (Classification Of Individual Consumption by Purpose adapted to the needs of HBS)

^{xii} Although services of travel agencies related to transportation or tourist guide services might be used, e.g. booking bus trips and the use of a guide.

^{xiii} TGT: Technical Group Travel - a special working group for travel balance of payments set up by the European Statistical Service (Eurostat).

^{xiv} see methodology in BoG's Economic Bulletin No 27, July 2006, p.70 at <http://www.bankofgreece.gr/BogEkdoseis/econbull200607.pdf>

^{xv} The proportion of total domestic supply accounted for by internal tourism consumption, per product and in total.

^{xvi} Tourism direct gross value added (TDGVA) is the part of gross value added generated by tourism industries and other industries of the economy that directly serve visitors in response to internal tourism consumption.

^{xvii} Tourism direct gross domestic product (TDGDP) is the sum of the part of gross value added (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net taxes on products and imports included within the value of this expenditure at purchasers' prices.

^{xviii} see

http://www.bankofgreece.gr/Pages/en/Bank/News/PressReleases/DispItem.aspx?Item_ID=5293&List_ID=1af869f3-57fb-4de6-b9ae-bdfd83c66c95&Filter_by=DT

^{xix} see <https://www.bankofgreece.gr/en/statistics/external-sector/balance-of-payments/balance-of-goods>

CO-EVOLUTION BETWEEN TOURIST DESTINATIONS AND TOURIST ENTERPRISES

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The purpose of this paper is to verify whether the nature of the relationship between a tourist destination and tourist enterprises operating within its territory, can be defined as co-evolutionary. This paper derives from the continuation of previous researches of ours about the topic of destination management and destination governance. The theoretical background of this paper is based on the following research question: within the framework of the international tourist scenario, are there tourist hospitality models designed as a prototype of co-evolution between the tourist destination and its territory? In the tourist context, which has lately become more complex, enterprises have to interact more and more with tourists, both national and from abroad, who pay more attention to the quality of the spare time they dedicate to tourism and to the discovery of the genuineness of the territory they are visiting. The need to fulfil the most diverse tourists' requests has promoted the development and the success of specific sustainable business solutions that are consistent with the evolution of their needs. For this reason, in order to intercept and manage the emerging dynamics in the tourist sector, it is necessary to start from the analysis of the issues related to the management and governance of tourist destinations and tourist enterprises. In our paper, the analysis perspective which is considered the most appropriate to qualify the nature of the relationship among a given tourist destination and its tourist enterprises is the co-evolutionary perspective. According to such perspective, tourist enterprises co-evolve together with tourist destinations, while looking for long-term competitive advantages:

tourist enterprises are considered critical resources to the development of the territory and vice versa. The co-evolutionary process implies the identification of a governance body able to exploit and enhance the systemic resources made available by the territory and to inspire the management approach of the different tourist enterprises.

The absence of specific case studies represents a limit of the present paper. Hence, with a view to a subsequent future research, we will continue the proposed analysis by enriching it with empirical evidence, which will be useful to foster the debate on the subject matter and for the related entrepreneurial and management implications.

Keywords: *Co-evolution, entrepreneurship, sustainable development, destination governance and destination management, network, competitive advantage*

INTRODUCTION

In an increasingly complex tourist scenario, the competitiveness of a tourist destination depends on the entrepreneurial ability of each tourist enterprise operating in that area to measure against competitor tourist destinations, at both national and international level. Therefore, each tourist destination needs to define its operative borders and identify a governance body, whether public, private or a mixture of both (Pencarelli, 2001), able to develop a strategic direction that will enhance the enterprises and the potential highlights of the area. (Pechlaner e Weiermair, 2000; Franch, 2002; Golinelli, 2002; Sainaghi, 2006; Martini, 2008; Valeri e Baiocco, 2012). In this sense, the systematic ability of tourist enterprises to perceive and evaluate the external context is crucial, as it requires responses that need to be more and more accountable. (Golinelli e Simoni, 2005). This could generate a possible *source of creativity* for a more *sustainable development* (Pechlaner et al., 2009; Valeri et al., 2016).

¹ The present work is the result of a joint research approach. Marco Valeri is the author of § 3, 4, 5, e 6; Leslie Fadlon is the author of § 2; the introduction and the conclusions have been written jointly.

The governance and the management of tourist enterprises have the responsibility to promote the growth of a favorable organizational environment supporting the development of new tourist products/services that need to be economically profitable, socially accepted by the hosting community and aimed at protecting local environmental resources. This can be achieved by creating a working environment with human resources having strong innovative potentialities, focused on exploring new paths of development and willing to take significant risks at reasonable costs. (Schianetz et al., 2007). The above also requires a stimulating environmental framework able to promote the development of challenging shared targets, which can only be achieved in a working context that supports the growth of new knowledge. The ability to innovate and compete successfully depends not only on the potential of the individual enterprises but also on their ability to manage the network of relationships tying the enterprises together. As the management literature has been affirming for years, the ability to oversee the dynamics of the network of internal and external relationships allows enterprises to compete successfully in a hypercompetitive framework.

Therefore, the research questions upon which the theoretical background of the paper is based shall be: *within the framework of the international tourist scenario, are there tourist hospitality models designed as a prototype of co-evolution between the tourist destination and its territory?*

The article is framed into three main parts. The first part of the paper offers an effort of systematization of national and international literature on the concept of tourist destination and its governance issues. The second part is dedicated to the analysis of the co-evolutionary relationship between the tourist destination and the tourist enterprise. The third and last part focuses on the aspects of networking among the different actors who, within the tourist

destination and at different levels, co-operate to the planning and the realization of the tourist offer system.

2. Ranking of Italy as a tourist destination in the international tourist scenario

The tourist industry has always played a strategic role in the world economy. Its economic significance, as well as cultural, social and educational, has been increasing at very fast rates since the second half of the Twentieth Century. In 2016, international tourists confirmed Italy in fifth place among the most visited tourist destinations worldwide. According to the United Nations World Tourism Organization (UNWTO), the international arrivals, throughout the year, amounted to 1.24 billion units, which is in excess of around 3.9% compared to the previous year. During the same period, the level of spending of international travelers in Italy amounted to 36.4 billion Euros, that is +23% compared to 2015. In the classification of year 2016 regarding the most visited European destinations by international tourists, Italy ranks top three as for presences of tourists in accommodation services, soon after Spain and France, with a share of 14% out of the total of European Union nations (stable compared to 2015). Italy, Spain, France and Germany together cover more than half (57.4) of the entire touristic presences in the Continent. In 2016, the tourist industry accounted for 10.3% of Italian GDP, employing around 2.7 million people, equal to 10.9% of the Italian national employment (Corporate Annual Report ENIT, 2017).

Italy, as a tourist destination, can count on a significant confluence of artistic, historical and landscape values that make this country stand out in the world.

This abundance of resources has a corresponding relevant organization solidity as far as the accommodation offer is concerned and an undiscussed vital hospitality management.

This has allowed Italy as a tourist destination to survive in the long term, maintaining, over the last three decades, the fourth position

for number of foreign tourists compared to other international tourist destinations worldwide. Within the European tourist scenario, countries as Denmark, Portugal, Holland, Luxemburg and the United Kingdom have experienced high growth rates in tourism. In a global tourist perspective, over 1.2 billion of international arrivals have been registered; France, although confirmed in the first place, has undergone a decrease of 4% following the terroristic attacks, Egypt has suffered a 40% decrease and Turkey has lost around 30% of tourist flows. It seems as though Cyprus, Spain, Malta and Croatia have been benefiting from this situation, with a double-digit growth rate. Considering possible political factors, initial estimates show how Donald Trump's sovereignty approach may have caused a 2.3 % drop of arrivals in the United States. According to the report presented by Unicredit, one of the main Italian banks, in partnership with Touring Club Italiano (2016), Europe remains the most visited tourist destination by international travelers, with 620 millions of arrivals, followed by Asia and the Pacific and then the United States (201 million of arrivals). In 2016 the highest growth rates were those of Asian-Pacific areas, Africa and America (+4.8%), while Middle East has suffered a decrease (-4.1%) and Europe had only a limited increase (+2%). Countries that generated the highest spending rate for outgoing tourism were China, ranking 1st place, followed by the USA and Germany. Russia only made it to the 6th place, as a result of a 31% drop compared to 2014. Within the Italian trend, Germany is the first reference market (53.3 million of presences), while China enters the Top 10 for the first time, with 5.4 million of presences.

Incomes in Italy for year 2016 have also been on a positive trend: 36.4 billion of Euros coming from international tourism, increased 2.3% compared to 2015 (Bank of Italy Euro system – Survey on international tourism, 2017).

3. Analysis approaches of a tourist destination

Over the years, the concept of tourist destination has been the subject matter of a heated scientific debate that has involved numerous national and international studies ([Pechlaner et. al.](#), 2012; Borzyszkowski, 2013). Nevertheless, until now there is still no univocal and satisfying definition of the concept of tourist destination, both from the interpretative and the managerial perspective. This justifies the existing confusion and the degree of difficulty to reach a fully convincing theoretical framework. While recognizing the difficulties involved in offering an effort of systematization of the existing literature, the doctrinal debate on the concept of tourist destination can be led back to two different analysis approaches (Valeri, 2013):

touristic demand, which emphasizes the destination as a tourist product or rather as a set of natural or artificial appealing factors able to attract tourists (Bieger, 2000; Casarin, 2007);

touristic supply, which emphasizes the importance of the offer system and of the tourist enterprises operating in the tourist destination (Tamma, 2000; Brunetti, 2002; Martini, 2002). According to such approach, the tourist destination is seen as an organized entity focused on the strategic role of the tourist offer system and of the tourist enterprises that, operating in the same destination, contribute to its development.

These two-analysis perspectives – *touristic demand and tourist supply* – have produced a wide range of positions supported by eminent academics, which have finally led to the theorization of an *integrated approach*.

The assumptions of both analysis perspectives merge into this integrated approach (Leiper, 1979; Della Corte, 2000; Buhalis, 2000; Franch, 2002). The *integrated approach* pinpoints the need, for the destination and the tourist enterprises operating in it, to adopt a considerably more managerial orientation than in the past.

4. Governance and management of tourist destination.

The governance of a tourist destination can be considered as a system of decisions and actions aimed at consolidating and increasing the competitiveness of the tourist destination over time, defining clear and shared development goals among all the actors of the tourist system (Ruhanen et al, 2010; Baggio e Cooper, 2010; Pechlaner et al., 2011; Ford, 2012; Paniccia et. al, 2014). Therefore, the governance body, whether public, private or a mixture of both, has highly complex and structured functions and is able to determine the strategic orientation of the destination exercising financial and strategic territorial control. In particular, the governance body has the task to understand and promote the tangible and intangible elements that characterize the cultural identity of a destination compared to its competitors, at local, national and international level.

This implies a broad shared decision-making process, either for direct or indirect arrangements, at governance level of both each single tourist enterprise and of tourist destinations. Moreover, all decisions shall be aimed at increasing the attractiveness of the territory, and consequently, the competitiveness of the tourist destination. (Sciarelli, 2007).

The governance activity includes actors/individuals who have an interest in the tourist destination (e.g. single managers, groups of workers) and/or an interest for the tourist destination: in this regard, reference is made to organizations considered “relevant” in the framework where the tourist destination operates (the so-called stakeholders).

Some of these stakeholders directly influence the objectives of the tourist destination (e.g. suppliers or tourist service brokerage firms); others represent either a public or a social interest towards the tourist destination, e.g. State organizations or citizens associations (Pechlaner et al., 2011; Beritelli e Bieger, 2014; Pechlaner et al.,

2014). According to prestigious researchers, where the model of the tourist fragmentation prevails, it is extremely “difficult to devise activities of destination governance expressing a strong and shared tourist offer management”. On the other hand, in contexts characterized by cooperation models, with lesser fragmentation, it is easier to identify key subjects able to play significant roles within the destination (Tamma, 2002). Within the framework of “Approccio Sistemico Vitale” (Golinelli C.M., 2002) the governance body is in charge of the definition of the territory development strategy. Its activity aims at the creation of value for the territorial system through an on-going interpretation and redefinition of the territorial vocation.

The main governance activities can be summarized as follows:

1. defining specific goals, development guidelines and priority actions of the system;
2. provisioning and allocating resources;
3. coordinating territory elements and development activities;
4. Identifying new business opportunities;
5. Implementing projects for the development and the promotion of the territory

Identifying a governance body is a necessary but not a sufficient condition to develop an integrated tourist offer within a tourist destination. Influential researchers believe that it is necessary to support the governance body with a meta-management entity, having the specific task to address tourist destination enterprises towards strategic coherent paths (Pencarelli, 2001). The meta-management body shall only support, and not substitute, the governance body, with the clear objective to facilitate shared processes of coherent strategic decisions among all actors, both private and public, who interact within the tourist destination.

Other researchers believe that the meta-management body should have the role of facilitating, carrying out the following activities (Martini, 2002):

- a. Engaging local actors in the definition of the strategic approach, highlighting benefits and overcoming conflicts;
- b. Officializing the relationship between the governance body and the single enterprises;
- c. Defining the control mechanisms and penalty measures against opportunistic attitudes;
- d. Defining the transparency procedures for the distribution of results achieved.

Managing a tourist destination is an arduous job, as well as managing a tourist enterprise. Difficulties lie in the planning of the strategic decisional processes and in the subdivision of the power of control over resources within the tourist destination. This can be observed in both strongly hierarchical tourist destinations, with a well-identified strategic and managerial hub, and in *corporate* and *community* tourist destinations (Bieger, 1998; Flagesta e Hope, 2001). They both differ in terms of planning of tourist offer and therefore they experience different governance issues.

On one hand, identifying a governance body within a tourist destination is considered essential, whether this is public, private or an outcome of a balanced and diversified cooperation between private and public actors (Migliaccio et al., 2004). On the other hand, there is a real sense of how hard is to develop cooperative relationships among these actors in order to implement actions aiming at increasing the quality of tourist services compared to competing destinations (Breukel e Go, 2009; Baggio e Cooper, 2010; Volgger e Pechlaner, 2015).

5. The co-evolutionary relationship between tourist destinations and tourist enterprises

The most suitable analysis perspective to better qualify the nature of the relationship between tourist destinations and tourist enterprises is the co-evolutionary perspective.

According to this approach, tourist enterprises co-evolve with tourist destinations in the research of long-term competitive advantages: tourist enterprises are considered crucial for the development of the territory and vice-versa (Henderson 1989; Paniccchia, 2006; Paniccchia e Leoni, 2017). The mutual dependence between the enterprise and the environmental framework significantly affects the ability to innovate, and consequently, the competitiveness of the individual enterprises as well as that of entire territories. This presumes strong abilities to explore and evaluate new business opportunities that the dialogue with the environmental framework is able to offer. The outcome is a planning and distribution of tourist services coherent with the real needs of the reference framework as well as with the enterprise's technical-organizational potential and its human resources. Therefore, enterprises and local contexts have to co-evolve in search of competitive advantages, the first being essential for the development of the second and vice-versa. In order to co-evolve, a tourist enterprise has to stimulate the reference environmental framework, influencing the strategic actions of actors that operate in it, in a sustainable perspective. (Valeri, 2015; Valeri *et al.*, 2016). This entails the ability of an enterprise to establish long-lasting relationships with the environmental framework, by engaging all actors of the territorial system through shared goals, motivations, knowledge and deadlines in order to create value in the co-evolution process (Cafferata, 2014). Within the Italian tourist scenario, the *albergo diffuso* can be considered as the *Made in Italy* response to the co-evolutionary process triggered between the tourist destination and the territory, identifying a new role for the small accommodating business in the local economic and social system. It is about small businesses managed by self-employed, handymen, entrepreneurs, who need to be encouraged because, although in many different ways, they succeeded to integrate with the territory. In their visionary

approach, they managed to blend traditional elements of the accommodation offer with relevant social and economic factors, such as the authenticity of territories and buildings, food and wine traditions, folklore and artisanship (Paniccia et al., 2014; Paniccia e Leoni, 2017). The enterprise–environment relationship results in a dynamic network of relations, voluntary and structured, that bond the enterprise with other organizations operating in the same environmental framework.

Co-evolving is not easy (Weick, 1969; Lewin e Volberda, 1999; Lewin *et al.*, 1999; Paniccia, 2006; Volberda e Lewin, 2003). The co-evolutionary process implies the identification of a governance body able to enhance the systemic elements that the territory offers and to stimulate the organizational behaviors of the different tourist enterprises. This happens through a conscious strategic orientation, shared by all actors - whether they belong to the business or not, whether directly or indirectly involved in the evolutionary dynamics of the territory - that enables to improve the consonance and resonance circumstances with the other tourist enterprises (Trunfio, 2008; Golinelli, 2010). The governance and the management of tourist organizations have the responsibility to promote the development of a favorable organizational environment that supports the development of new tourist products/services that are economically profitable, socially accepted by the hosting community and aimed at protecting local environmental resources. How? By creating a working environment with human resources having strong innovative potentialities, focused on exploring new paths of development and willing to take significant risks at reasonable costs. (Schianetz et al., 2007). This requires the existence of a stimulating environmental framework able to promote the development and the participation in challenging shared targets, which can be achieved in a working context that supports the growth of new knowledge. Hence, if the competitiveness of tourist organizations is measured by the ability to provide tourists with the chance to live unique experiences,

their governance and management will have the delicate task to develop a series of actions able to:

- a. Promote and enhance the local intangible cultural heritage of the hosting community;
- b. Engage small businesses, whether local or not, that might become sources of financing;
- c. Enhance the quality of the tourist offer based on intangible resources and on integrated social and environmental aspects;
- d. Improve the quality of accommodation and tourist services

Creating and maintaining such a context implies the existence of an internal organization structure specifically dedicated and oriented towards the development of innovation, where human resources are constantly challenged. Another element to take into consideration to create a suitable organization context is the setting up of an efficient and effective control system. The difficulty faced by the enterprises that want to create tourist product/services is trying to match the freedom of ideas with the efficiency of the development process. Control activities must not be too strict, not to prevent the most authentic initiatives. Creating the right degree of engagement, the development of new ideas would be easier (Landorf, 2009; Epstein et al., 2010). However, all the above is not enough, if tourist organizations do not implement an efficient and effective incentive system able to inspire creativity and autonomy, rewarding the actors involved in the development of new products/services and granting suitable recognitions, whether monetary or not (e.g. promotions), according to job profiles. All essential ingredients to achieve an organizational balance. This entails the activation of mutual relationships by both tourist destinations and tourist enterprises.

5.1. An analysis model of co-evolution

Co-evolving is not easy (Weick, 1969; Lewin e Volberda, 1999; Lewin et al., 1999; Paniccia, 2006; Volberda e Lewin, 2003) and

defining a thorough management model that can represent the process of co-evolution is just as difficult. Below is a matrix of co-evolution between a tourist destination and a tourist enterprise (Fig.1), that is the result of the re-elaboration of management models confirmed by national and international literature (Hrebiniak e Joice, 1985; Golinelli C. M. 2002; Cafferata, 2014

The matrix can be interpreted in either a static or a dynamic way. It considers four different configurations of tourist offer system, determined according to the intensity of the aptitude shown by a tourist destination and a tourist enterprise in being able to activate mutual relationships with actors operating in the territory (Ma e Hassink, 2013). The position in one of the four quadrants represents the different degree of aptitude.

Figure 1- Matrix of co-evolution between a tourist destination and a tourist enterprise

Propensione dell'impresa turistica ad attivare relazioni con la Destinazione turistica	Alta	sistema di offerta turistica embrionale IV	sistema di offerta turistica coevolutiva III
	Bassa	assenza di un sistema di offerta turistica coevolutiva I	sistema di offerta turistica in via di compimento II
		Bassa	Alta
		Propensione della destinazione turistica ad attivare relazioni con l'impresa turistica	

Aptitude of the tourist enterprise to activate relationships with the tourist destination

Source: internal processing

The four configurations are the following:

Absence of a co-evolutionary system of tourist offer (I). This group is characterized by the absence of a governance body of the tourist destination able to understand and exploit the elements featuring the territory identity, compared to competing destinations and to other tourist enterprises operating in it. This situations may jeopardize the competitiveness of the tourist destination and above all the outliving of the single tourist enterprises

Presence of a system of tourist offer in the process of completion (II). This is the most recurring configuration. It is characterized by the

presence of a governance body of the tourist destination involved in the exploitation and promotion of local resources. Nevertheless, cooperation processes between tourist enterprises and local actors are not yet well structured and therefore still on the way to be completed;

Presence of a co-evolutionary system of tourist offer (III). This group is characterized by the presence of a governance body of the tourist destination with full powers of orientation and coordination, focused on enhancing the territory identity conceived as a source of vitality of the tourist destination. The presence of a co-evolutionary system of tourist offer fully meets the necessary requirements allowing to put in place concrete actions that aim at exploiting the territory and that are vital to increase its competitiveness;

Presence of a tourist offer at an embryonic stage (IV). It is characterized, on the one hand, by the absence of a tourist destination's governance body in charge of coordinating and addressing the activity of exploitation of the territory and, on the other hand, by the prevalence of self-managed processes put in place by tourist enterprises. The extended absence of a governance body able to aggregate decisions and strategic actions on the territory may cause recession.

The position within one of the four quadrants of the co-evolutionary matrix depends on the synergic and mutual relationship between the ability of tourist enterprises to create value within the tourist destination they belong to and the level of attractiveness of the resources of the tourist destination itself. This prerequisite represents a significant and crucial leverage for the strategic orientation of the governance body of a tourist destination, with the aim to improve the

competitiveness of the environment framework and to guarantee the outliving of local enterprises, whether tourist or not.

6. The strategic role of tourist network

In today's complex competitive context, businesses need to own an increasingly qualified background of resources and expertise in order to compete with an ever more challenging competition. This results in an increase of specialization of the single enterprise that has actually created a reduction in the number and in the variety of shared knowledge and capabilities (Valeri e Paoloni, 2016). The deep cognitive distance between individual enterprises and, at the same time, the lack of necessary resources to gain new knowledge may represent elements of friction for the cooperation processes. In this sense, networking can represent an organizational model suitable to promote the growth of small and medium-sized enterprises, which have only limited knowledge and resources essential to compete in an ever more complex market. Within the international scientific debate, researchers have focused their studies on the analysis of the evolutionary dynamic of networks and on the factors that influence their success over time (Gulati e Gargiulo, 1999; Soda *et al.*, 2004; Das e Teng, 2002; Yin *et al.*, 2012). Thanks to an interdisciplinary approach, that over the years has enriched the debate on the theory of networks (Parkhe *et al.*, 2006), it is possible to mention some inputs identifying the evolutionary phases of the creation and development of inter-organizational relationships such as:

- 1) the reasons that have determined the origin of the network. These highlight, on one hand, both the central role played by elements related to the reputation of individuals and of the organization, and the existence of previous relationships. On the other hand, they also highlight the central role of those elements linked to possible investments, to the perceptions

about the uncertainty of the business and the relevant actions to implement;

- 2) the necessary circumstances to build any kind of relationship between enterprises, starting from the features of potential members and their will to meet and agree on future conduct regulations. And last,
- 3) the aptitude towards an agreement on future conduct rules and on control mechanisms aimed at governing conflicts

In the specific case of tourist destinations and enterprises, the benefits deriving from belonging to a network can be:

- 1) *economic benefits*: differentiation/diversification of the tourist offer in line with the specific needs of the customer segments, development through expansion/integration in new emerging markets, design of tourist products through the exploitation and enhancement of local resources;
- 2) *benefits from design and development of tourist products/services*: greater access to sensitive information, by activating intelligence systems where possible, increased efficiency and effectiveness in productive processes, and optimization of costs.

Belonging to a network can promote the development of innovation of tourist enterprises involved and stimulate the creation of new business realities that operate in alternative markets, exploiting new knowledge and meeting new clients and tourist institutions (Saxena, 2005; Morrison *et al.*, 2004; Volgger and Pechlaner, 2014). In the specific case of tourist destinations, which operate in a competitive and constantly evolving environment, relationships between actors are becoming more and more significant.

Although at different levels, in fact, actors involved actively co-participate in the design and realization of the tourist destination offer such as a) tourist suppliers and b) tourists.

6.1 Relationships with suppliers of tourist services

Developing a tourist product/service (e.g. vacation spot, museum visits, etc.) requires the availability of accessory services that the individual tourist enterprise is not always able of providing internally. For this reason, tourist enterprises turn to a more or less wide group of suppliers of tourist services considered essential to the implementation of their own peculiar activity (e.g. transport enterprises, catering, etc.). The position of tourist enterprises on supply markets is strongly influenced by the criticality of the recurring resources they need (environmental, strategic and qualitative criticality of the product to be procured) and by the ability to carry out, concretely, procurement actions in line with their necessities. Indeed, the above implies a real “provisioning capability”. This, in turn, is based on both the ability to contact suppliers, to guarantee the reliability of supplies, to control the technical knowledge over time, to maintain long-term relationships, and on the presence of an appropriate organizational system. In this framework, a risky element is represented by the articulation of the relationships between the purchasing enterprise and its suppliers. In this respect, it is possible to talk about “*shared provisioning*” to highlight the trend towards a “*re-location from the “competitive triangle” (clients, competitors, enterprise) to the “cooperative rectangle” (client, competitor, enterprise, supplier)*” (Kraljic, 1984). These relationships are determined by both *external elements*, which define the market strengths of suppliers, and by *specific features of the enterprise* that define its strength in terms of provisioning powers. *External elements* can be traced back to the more or less complex character of the supply market, expressed in terms of offer excess/deficiency, degree of concentration, intensity of renewal of materials and components,

possible existence of entry barriers, localization, and size of transnational costs.

Among the *specific features of the enterprise*, we can include the adopted policies (e.g. collaboration relationships with suppliers, applicable also to financial aspects and to production planning, development of alternative sources, integration processes, even if partial, etc.), the size and qualitative composition of the purchase share, and the dimension of the business.

First of all, it is important to distinguish between the quality of the relationship with the supplier and the contribution of the supplier to the development of an innovative tourist product. If the nature of the tie between an enterprise and a pool of suppliers of tourist services is cooperative, it is essential to establish medium to long-term relationships with actors considered integral part of the framework of reference, sharing with them a specific business culture, opened to the external environment, and that sustains and guarantees the innovation and the durability of the enterprise/supplier relationship (Paniccia, 1995). This relationship will necessarily turn into shared goals, common participation in the planning of new tourist products/services, shared and sustained investments with a high degree of specificity.

For this reason, it is necessary to develop, within enterprises, new *organizational profiles* to support the management of the relationship system with suppliers of tourist services who, thanks to ICT technologies, may ensure a real time exchange of data and information (*e-procurement*) and rapidly understand the main expectations of the suppliers themselves.

6.2 Relationships with tourists

The tourist is the customer of the tourist offer. This figure is usually considered as an indefinite part of a target to tackle with

specific techniques, also of a psychological nature, and with appropriate marketing tools, with the aim to influence his purchase decisions. The need to meet the requirements of an increasingly mature tourist translates into the ability of the management to listen to the numerous requests that come from a specific environment and that can widely vary. The same model of environmental framework is used to highlight the importance taken by external actors who interact with the enterprise, and the consequent strategic importance given to the implementation of two-way, long-term and accountable relationships. As in other productive sectors, the tourist is not usually engaged in the planning and definition of the product to purchase. Actually, the tourist is rather seen as a passive actor of an exchange system controlled by opportunistic behaviors of tour operators and travel agencies that would study their own purchasing policies in order to develop a product coherent with the market expectations. On the contrary, the tourist/customer is no more an irrational subject, but rather a careful and competent individual when it comes to his/her purchasing decisions. First of all, it could be possible to affirm that organizational, productive and market behaviors of tourist enterprises largely depend on the features of their customers, who contribute to the definition of the rules governing the productive and commercial activities. This means leaving out the vision centered on the enterprise, particularly fit for the “Ford” model, where standardized (or differentiated) goods are offered within markets whose consumers have poor ability to choose their own expectations and needs in autonomy. That is to say, an environmental framework where the enterprise prevails in the relationships with the market, that plays a mere role of passive absorption of the offer, and where the mechanisms of collecting information, that guide the planning and creation of products, have limited and sporadic nature. As far as tourist enterprises are concerned, it is possible to confirm that a shift is under way in both the system of *producing value* for the end user, also due to the recent evolution of consumers’ behavior, and in the type of relationship developed with the market for which the products

are intended. In other words, laying much greater emphasis on the management of information coming from consumers in order to direct the planning and development of products towards the market requirements. Hence, tourist enterprises shall collect from the market all the elements on which the end user judgment will depend and that will be considered significant to evaluate the product, and act on them to develop a *coherent* tourist offer compliant with the expectations of the selected market segment.

7. CONCLUSIONS AND LIMITS

Within the framework of the international tourist scenario, are there tourist hospitality models designed as a prototype of co-evolution between the tourist destination and its territory?

All the considerations made in so far allow us to locate the subject of co-evolution between tourist destinations and tourist enterprises within a wider perspective, starting from the type of tourist involved in relationship. Where the market segments are characterized by a substantial simplicity, the intensity of co-evolution between tourist destinations and tourist enterprises is measured upon the satisfaction of the tourist. Differently, when the market segment is more complex, the intensity of co-evolution between tourist destinations and tourist enterprises is measured through a dialectic and continuous process of trial and learning between the two subjects, as a result of the evaluation of the needs expressed by consumers. In complex competitive contexts, this goal can be achieved only through a real involvement of the consumer in the definition of the features of the tourist product/service. To define their own strategies, in order to adapt tourist offer to tourist expectations, tourist enterprises shall arrange a series of managerial mechanisms able to evaluate market needs and then finalize them in innovative products/services. Facing competitive challenges, by promoting innovation, means being able

to promptly take advantage of market needs and changes and suggest new ideas. Within the Italian tourist scenario, the *albergo diffuso* can be considered as the *Made in Italy* response to the co-evolutionary process triggered between the tourist destination and the territory, identifying a new role for the small accommodating business in the local economic and social system. It refers to small tourist enterprises that were able to fit in with the territory, combining, with a forward-looking approach, traditional elements of the accommodation offer with relevant social and economic factors, such as the authenticity of territories and buildings, food and wine traditions, folklore and artisanship.

This paper represents an effort to organize the research in the tourist sector about aspects that are still not well defined. Despite the absence of case studies to support the theoretical framework, with a view to a subsequent future research, we will continue the proposed analysis by enriching it with empirical evidence, that will be useful both to foster the debate on the subject matter and for the related entrepreneurial and management implications.

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NETWORK CREATION AND USE OF TOURISM INFORMATION CHANNELS IN A DESTINATION OF RELIGIOUS SIGNIFICANCE

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This paper examines the structure of the tourism information channels employed, as well as the existence of networks for the promotion of religious tourism in the prefecture of Arcadia, in Peloponnese, Greece. Quantitative methodology was employed with the use of a field survey research based on 775 valid questionnaires, in the province of Arcadia, including Greek and foreign tourists. Content analysis of 124 hotels websites which have an online presence also took place in order to examine the existence of networks in the area. Results regarding the type of the tourism information channels employed from the key stakeholders involved in the promotion of the region of Arcadia, reveal that the existence of networks in regard to religious tourism in Arcadia, Greece, is extremely limited, if not existing at all; religious tourists depend firstly on the traditional channel of word of mouth, as recommendations from friends and relatives is their first information channel choice, followed by the internet and thirdly, by hotel listings. However, all information channels do not take advantage of the density of the region and do not cooperate for marketing the area as a whole; the promotion of specific areas and businesses over others does not allow the expansion of networks to take place, as research has shown. The absence of network creation in the region under study illustrates an area that could be further improved, a goal of significant importance for economic development, especially in a period of economic crisis in Greece.

Keywords: *tourism networks, religious tourism, advertising, social media, information channels*

INTRODUCTION

The projected image of a destination is formed by a complex and dynamic network of agents acting as information sources such as residents, businesses, marketing organisations, travel agencies (Frías et al, 2012, p.439). The structure of the tourism information channels employed, as well as the existence or not of entrepreneurial networks that may promote and advertise a region, a place, a city and its distinct characteristics (such as religious tourism), is what authors have called for research (Mariani et al, 2014; Kavoura & Katsoni, 2013a; Lemmetyinen & Go, 2010; Anderson & Ekman, 2009; Wray, 2009).

Networks are associated with the creation of ties for the collaboration and cooperation between members who collectively join together in order to create and encourage alliances and share similar ends basing their existence on relationships (Scott et al, 2008; Achrol & Kotler, 1999). Network analysis describes the structure of relations displayed by links between given entities displayed by nodes (Shih, 2006, p. 1031). An important issue is to identify nodes in the network, to see the centrality that exists between entities, the interaction between pairs of other nodes (Shih, 2006; Wray, 2009). The research questions refer to:

- 1) The significance attributed from tourist stakeholders of the region (both religious visitors and hotel associations) to the information provided for advertising and promoting religious tourism in the region.
- 2) The examination of the existence of networks in regard to the promotion of religious tourism and the marketing of the region.

- 3) The extent of use of networking associated with the religious tourism market segment.

To answer the abovementioned questions, the research employed both quantitative and qualitative research methodology for the triangulation of the results following a case study design. 'Triangulation' enabled the researchers to have a mixture of sources for gathering data and thus, "gain a better assessment of the validity of the explanations" (Maxwell, 1996, p.75-76). The paper adds to the literature on the examination of the structure of the tourism information channels employed and the existence of networks for the specific area, focusing on the promotion of religious tourism. Such research which examines the role of networks and information channels for marketing Arcadia, Greece has not taken place at national and local level.

Religious tourism and information channels

According to Baum (2000) and the tendency of New Age Spirituality (Rountree, 2002), the concept of religion has shifted with the advent of modern secularizing trends such as post-industrialism, cultural pluralism and scientific rationality; the term "religion" refers to things outside the realm of traditional religious institutions, seen as a privatized and pluralized experience where the "spiritual" and the "religious" are separate (Olsen & Timothy, 2006). According to Simone-Charteris & Boyd (2010, p.233), tourists can be either pilgrims, religious travelers and cultural tourists (Collins-Kreiner & Gatrell, 2006), as they travel to a widening variety of sacred sites not only for religious or spiritual purposes, but also for reasons of a more secular and cultural nature, e.g. when people have an educational interest in learning about the history of a site or understanding a particular religious faith and its culture and beliefs; for nostalgic reasons or patriotic stirrings; for a chance to admire architectural or

natural wonders; in search of authentic experiences; or simply out of curiosity (Olsen & Timothy, 2006; Shackley, 2001, 2002). Thus, “religious tourism can, and does, include other forms of travel activities that do not fall into the category of pilgrimage” (Ron, 2009, p.289).

Although people’s religion has been characterized as a key factor that influences individuals’ behaviors as travelers, travel agencies and other tourism organizations do not effectively manage religious travelers, despite the fact that the religious market group consists the 25 per cent of the tourism market” (Triantafillidou et al., 2010, p.383). Elements that are advertised and promoted can be related to religious tourism all over the world such as Mount Athos, Greece or Jerusalem in Israel (Simone-Charteris & Boyd, 2010, p.230). It is important though, that an advertising message intended at a specific audience from a specific person, state, stakeholder who promotes this message, should have an ‘effective community of minds’ in order for the message to be received, taking into consideration the prior knowledge of the target group (Kilamby, Laroche, & Richard, 2013, p.49).

Since tourism distribution and information channels are part of touristic infrastructure, tourist stakeholders need to understand the strength and effectiveness of using them in order to deploy a better marketing and promotion strategy. The ease of use, interactivity and flexibility of Web-based interfaces suggests an allied and important role for World Wide Web technology in destination marketing and tourism Websites are constantly being made more interactive (Gretzel & Yoo, 2008), support communication with service providers and interpret the visitors’ experience of local assets (Mitsche et al., 2008; Katsoni & Dionysopoulou, 2013). Internet is now an immense platform of interaction which opens new levels of engagement, exchange and collaboration between users (Sigala, 2009; Ramaswamy, 2009), and one of the critical forces for the advancement of society and the growth of the empowered consumer. Diffusion of information through online technologies within the tourism industry has significantly impacted communications,

transactions and relationships between the various industry operators and with the customer, as well as between regulators and operators (Katsoni, 2014; Sheldon, 1998). Recent research has shown that the web and online reviews in regard to a destination are considered to be among the most important channels to collect information about a tourism destination and are more reliable than official sources for a tourist (Milano, Baggio, & Piattelli, 2011).

Social media advances change the way tourists access, share, discuss and distribute information (Sigala, 2017a), play an important role in the travel planning process (Katsoni & Venetsanopoulou, 2013; Leung & Bai, 2013 p.59, 62) and influence experience co-creation (Sigala & Gretzel, 2017b). The ‘virtual’ or ‘social’ network has really revolutionized communication, interaction and business in general. ‘Virtual’ or ‘social’ networks can be defined as permeable structures without physical borders separating them from the environment, comprising a multiplicity of autonomous, interdependent and self-organizing actors that rely on the internet infrastructure to integrate and exchange value (Katsoni, 2013a).

Important changes have also occurred in the travelers’ search for information when choosing a tourist destination since the advent of internet and Online Travel Agencies with booking and ratings/review functions (hereafter OTAs) and User Generated Content (hereafter UGC) all attract the attention of consumers. Although there exists great variation of credibility in different types of social media tools (PhoCusWright 2009; Del Chiappa, 2013, 2012; Yoo et al., 2009), online reviews and recommendations that tourists post online are perceived to have a higher credibility than traditional tourist information sources (Gretzel & Yoo, 2008), with OTAs being the most credible and the most able to influence tourists’ choice. In addition, it was found that viral marketing through Facebook messages has a strong effect on the increasing number of members (Leung & Bai, 2013, p.62). Both Word of Mouth (WoM) and electronic Word of Mouth (eWOM) enable destination management

organizations (DMOs) to strategically position their marketing collateral to meet the specific needs of destination decision makers (Tham, Croy, & Mair, 2013). According to Leung and Bai (2013), Kim, Kim and Nam (2010) and Kim, Shim and Ahn (2011), individuals' motivations to use a social networking site has a positive relationship with social networking site use, which will be strengthened if social media is believed to bring benefits to the user.

Therefore, the paper examines the significance attributed from tourist stakeholders of the area (both religious visitors and hotel associations) to the information provided for advertising and promoting religious tourism in the region.

Network Creation in the Tourism Industry

Networks are associated with the planning and interaction between corporate pressure groups that are influential and occupy top positions in a related sector, setting the agenda and creating subsystems (Wray, 2009). Density and centrality are important for a network and there is limited research on the dynamics associated with actor strategies (Wray, 2009, p.676). The tourism industry consists of the ideal context for the creation and expansion of networks. Tourist private networks are created with the individuals involved (for example, family run businesses) and the relationships created among them; they allow people to have access to power and resources important to entrepreneurship (McGehee et al., 2010, p. 486); furthermore, these resources are only effective if distributed and traded through a channel or a network (Hazra, Fletcher, & Wilkes, 2014). The regional planning process can also include local businesses, since private businesses associated with tourism have a better knowledge of the area and consist of various distribution channels so that people can get the information they need (Del Chiappa, 2013).

Furthermore, the interdependence of public and private actors in policymaking influences networks and this is also an issue that needs

to be studied in order to build on the developing literature (Katsoni, 2018; Tsartas & Sarantakou, 2016; Kavoura & Katsoni, 2013b). Networks between the private and the public sector may include public and private alignments, a cooperation that needs to be accounted for in the creation of networks. Networks “get Small Medium Enterprises that would normally work in isolation to co-operate and build a successful tourism product in a locality” (Novelli, Schmitz, & Spencer 2006:1143). The public sector sets the preconditions for effective public-private cooperation (Mariani et al., 2014) although research shows that this may not always be the case, since public sectors may be slow to the initiation of such collaboration (Kavoura & Katsoni, 2013b). Private stakeholders are encouraged to participate. Cooperation between members in tourism strengthens the brand image of a destination (Mariani et al., 2014).

ICTs all add to the image and reputation of a tourist destination (Katsoni & Dionysopoulou, 2018; Mariani et al., 2014:5; Stratigea & Hatzichristos, 2011). People in networked markets believe that the information they get is better online because there is consumer engagement (Milano, Baggio & Piattelli, 2011). The person involved is in fact the co-creator of the information provided. Nonetheless, tourism operators have not yet fully understood the new technological world (Milano, Baggio & Piattelli, 2011; Katsoni & Kavoura, 2013) although online social networks facilitate interactive information sharing and the creation of communities that share similar interests.

Networks share specific characteristics such as specific way of behavior, the discovery of relations and not the a priori allocation to categories, multiple relationships in a group (Scott, Baggio & Cooper, 2008). Trust plays a prominent role in which exchanges take place and networks devote more time and resources to manage information for the product (Achrol & Kotler, 1999:146). Since firms in tourism often regard one another as competitors and not as colleagues, the issues of ‘trust’, ‘ties’ and ‘social capital’ are important determinants of the provision of the tourism product at the destination level (Inkpen

& Tsang, 2005). Trust, rather than competition with each other is the objective since networks deter competition (Kavaratzis & Ashworth, 2008; McGehee et al., 2010:486). The emphasis is on cooperation among businesses; rather than on spending energy, time and money to observe how to 'compete' other businesses, everyone works as part of a group with multiple benefits and results for all.

Taking the supply side perspective, that is the senders of the communication messages in regard to the advertising of a place or a region, there is a necessity to specify what it is that they want to project to the rest of the world, so as to have a consistent message to reach the demand side (Kavoura, 2013; Konečnik & Go, 2008:178-179). The identification of the coordination of cooperative activities in tourism business networks may be a prerequisite for enhancing the value-creation process in order to build the brand-identity process across the network (Lemmetyinen & Go, 2009). Case studies have been suggested in literature which are necessary in order to shed light on the local tourism networks created (Katsoni, 2014; Wray, 2009:688), thus offering reason for the present study. Taking into account that destination network management may introduce a dynamic, activity-oriented approach as opposed to the actor-focused DMO's view (Meriläinen & Lemmetyinen, 2011), the paper examines the existence of networks in regard to the promotion of religious tourism and the marketing of the region of Arcadia, Greece and the extent of use of networking associated with the religious tourism market segment.

Methodology

Arcadia is located in Peloponnese and is one of the 9 geographical Prefectures of Greece. It is a well defined area to analyze regarding the promotion of religious sites in the area. The monasteries and the prefecture is two hours away from Athens, the capital of Greece, within a distance of 120 kilometers from the capital. Thus, the proximity of the region to a big urban centre such as Athens is of

significance for those that would like to have a one or more days to spend in Arcadia. Research has shown that proximity in big urban centers may influence the influx of tourists in a region (Bitsani & Kavoura, 2012).

Since the proposed purpose of the study was to examine the way local public and private authorities employ means of advertising and communication for the promotion of religious tourism in the area and the existence of networks, quantitative and qualitative research were employed for the thorough examination of both demand and supply side of the religious tourism market for the triangulation of the results, which is presented below.

Results

Quantitative methodology and results

Quantitative methodology was employed with the gathering of 775 valid questionnaires, out of a total of 3500 in order to further understand the tourism market in the province of Arcadia, Greece, over a period of 12 months, to eliminate seasonality, starting in May 2012. The response rate was a satisfactory 22%. We used a convenience sample by distributing questionnaires to various survey sites of the region; people working in the prefecture of Arcadia helped in the process. Data were collected by using a self-administered questionnaire, in Greek and English, primarily designed to gather data regarding the significance attributed from religious visitors of the area to the information provided for advertising and promoting the region. Their participation in religious attractions was identified through the question: "As part of your vacation how likely is it to be interested in visiting religious sites in Arcadia". The visitors' choice of information channels used was identified through the question: "What kind of information have you used to visit Arcadia?"

The overall goal of the present research was to extract results regarding the use of tourism information channels in an attempt to verify the existence and importance of networking at the destination, as well as the extent of use of such networking.

The survey data were coded and analyzed using R, an open-source statistical package. Descriptive statistical analysis was applied to the collected data to explore the overall sample profile. In order to identify special characteristics of the sub-population of tourists that have replied positively to the question on how likely they are to be interested in visiting religious sites in their vacation, we have separated this group from the rest of respondents and have constructed the following sub-groups for subsequent analysis:

- Group A (N = 321): ‘Very likely’ to be interested in visiting religious sites
- Group B (N = 454): ‘Very unlikely’ to be interested in visiting religious sites

We conducted Chi-square tests to verify whether differences between the two sub-groups, as regards particular characteristics of the population of tourists, are due to chance variation or reveal some statistically significant trend. Chi-square tests were chosen for use in this exploratory investigation to aid in making inference about the uniform distribution (or not) of the two sub-groups in relation to demographic, trip and booking characteristics.

The initial chi-square analyses were conducted to determine differences among the Group A and Group B tourists’ nationality, but we came up with a non-significant result $p = 0.13$ so we concluded that it was an appropriate way of splitting the data. It is typical to note, that in regard to nationality, Greek visitors are more in relation to non-native visitors. There were only 41 foreign visitors filling in the research, out of whom 3 from Denmark, 15 came from Germany, 12 from England, 7 from France, and 4 from Sweden.

The aim of the following part of the analysis is to explore the tourists' preference regarding the selection of tourism information channels for their journey. The researchers content analyzed 124 hotels out of the 312 existing hotels in the region (Katsoni, 2011b) in September, 2014, which were listed under expedia.com, booking.com and HRS.com

(HotelReservationSystem)([http://www.expedia.ie/HotelSearch?#&ddestination=Arkadia](http://www.expedia.ie/HotelSearch?#&ddestination=Arkadia;);http://www.booking.com/searchresults.el.html?s rc=index&nflt=&ss_raw=Arcadia <http://www.hrs.com/web3/>).

Comparisons between the two sub-groups (Group A and Group B) have been conducted using the chi-squared test (Table 1) and a significant chi-square has been derived for Internet only ($\chi^2_{1df} = 6.4, p < 0.02$). Figures in Table 1 reveal that it is less likely for tourists in Group A to use the Internet to book their vacation. Information sources are displayed in Table 1, showing the preference for tourists in Group A.

Table 1 Chi-Square Analysis of Tourism Information Channels' Characteristics of Tourists who find interest in visiting religious sites in their vacation

			Very likely to be interested (Group A)		Very unlikely to be interested (Group B)	
			n	%	n	%
Total			321		454	
Recommendations from friends and relatives			166	51.7	256	56.4
						<i>X-squared</i> <i>= 1.4734, df</i> <i>= 1, p-value</i> <i>= 0.2248</i>

	Very likely to be interested (Group A)		Very unlikely to be interested (Group B)		
Internet	152	47.4	258	56.8	X- squared = 6.4022, df = 1, p-value = 0.01140
Information from using a Global Positioning System (GPS)	15	4.7	23	5.1	X-squared = 0.0065, df = 1, p-value = 0.9356
Hotel listings in OTAs: Booking.com, Expedia.com, HRS.com	24	7.5	23	5.1	X-squared = 1.5183, df = 1, p-value = 0.2179
VIDEO/CD- ROM/DVD/VIDEO TEXT	21	6.5	22	4.8	X-squared = 0.7341, df = 1, p-value = 0.3916
Information from using a P.D.A (Personal Digital assistant)	13	4	24	5.3	X-squared = 0.3897, df = 1, p-value = 0.5325

The results of the research question regarding the type of the advertising channels employed from tourism stakeholders to promote

religious sites in Arcadia, Greece reveal that religious tourists depend firstly in the traditional channel of word of mouth, as recommendations from friends and relatives is their first choice with a percentage of 51.7%, followed by the internet and official websites of the hotels (47.4%) and thirdly, by hotel listings such as Booking.com, Expedia, HRS (7.5%). The word of mouth (WOM) such as recommendations from friends and relatives that this research highlighted as the most important tourism distribution channel for dissemination of information is consistent with Andersson & Ekman (2009, p.43; Tham, Croy & Mair, 2013) regarding the fact that consumers have far more confidence in the views of friends and acquaintances than in a message that emanated from advertising or corporate spokespeople. However, results also reveal that it is less likely for religious tourists to use the Internet to book their vacation (see Table 1).

Qualitative methodology and results

Interpretive phenomenology was used in this research, as it is a method which permits the identification of themes -a statement of meaning that runs through all or most of the pertinent data or one in the minority that carries heavy emotional or factual impact (Holstein & Gubrium, 1998, p.150; Myrray & Chamberlain, 1999, p.220). It aims to offer insights into how a given person, in a given context, makes sense of a given phenomenon (Smith, Jarman & Osborn 1999, p.220). Issues that repeatedly emerge in the data create patterns for the research. Then, themes are headed under the umbrella of a superordinate theme, a theme that incorporates many sub-themes (Kavoura, 2007). Themes that emerged from the analysis of the promotional material are associated with the role of the local private tourism entrepreneurs to promote the region and the elements used as significant to be branded. It is the credibility that is searched in qualitative research; convergence of a major theme or pattern

provides credibility to the findings (Maykut & Morehouse, 1994, p.146).

The authors analyzed the advertising tourism materials -printed and electronic-employing interpretative phenomenological methodological approach for Greek and English speaking visitors, for a well defined period of 8 years. The first edition that took place for promoting the region in print in 2006 and all the other printing material which was created since then were analyzed. Printed promotional material was analyzed from the Hotels' Association and Hotels' Owners in Eastern Arcadia, the Secretary General of the Prefecture of Peloponnese, where Arcadia belongs but also the leaflets that hotel owners distribute in the region. Our criterion was to collect the information that was first created for the promotion of the region in order to consider any changes made in the passage of time. Our aim was to collect all the existing information related to the promotion of the region to a truly international population. The one and only one booklet of the Hotels' Association and Hotels' Owners is written in Greek. In regard to the place identity of the region, information is provided in this booklet about the monasteries of the region (Vachaviolos, 2006, p.16) putting in that way emphasis on the cultural-religious element of place identity which is presented as the first information about the region. Nature and natural capital is the other bid section in the booklet promoting the flora and fauna, the waterfalls, the caves of the region (Vachaviolos, 2006, p.22). When it comes to the presentation of the hotels, which can be associated with the network creation, there is a list of the accommodation available but more specific information about the hotels is not provided, neither information regarding other tourism enterprises, such as restaurants, taverns and various forms of entertainment (Vachaviolos, 2006). It is stated that this accommodation officially operates under the license and within the network of the Greek National Tourism Organization (GNTA) (Vachaviolos, 2006). However, information about food and gastronomical choices of the region is presented in just three lines just before the booklet ends; names of restaurants and shops could be

presented to enable the tourist to have an idea of where to go and eat (Vachaviolos, 2006). A network does not seem to exist between private tourism stakeholders in the area for the printed advertising material of the region.

Furthermore, the cultural association of Doliana in Arcadia, Greece has created a leaflet for the promotion of the region implementing a network; the leaflet contains information about accommodation, restaurants and taverns, traditional food and gifts from the region, athletic and cultural activities (Ano Doliana Arcadias, 2007). However, this is an exemption in regard to the network practices applied in the region. Even such effort, is not fully implemented since the title of the leaflet is written both in Greek and English while the information in the leaflet is only in Greek discouraging in that way, the English speaking visitors for getting the information they would like but also the networks promoted and described above, to reach the potential target groups.

Electronic material on the websites was also searched, in order to delimit the huge amount of data that could emerge; thus, we searched only the sites that were created from associations and organizations that incorporate more than one business. In fact, it was found out that the official site of Peloponnese <http://www.discover-peloponnisos.gr/> does refer to a limited number of private accommodation sector tourist enterprises when you look for the specific area of the prefecture of Arcadia and also has a connection to “odysseus”, the official server of the Hellenic Ministry of Culture (<http://odysseus.culture.gr/>), but surprisingly, the latter has no reference to the important religious sites of Arcadia. The Church’s website was another web site that was searched as it could be possibly a potential part of the network. Unfortunately though, church’s official website <http://www.ecclisia.gr> has neither connection with any tourists’ enterprises of any kind of tourism in the private sector nor connection with the prefecture’s official site; there is only reference to monasteries in Arcadia.

The authors also employed content analysis of hotels' websites as a supplementary research method when multiple methods are used. According to Neuman (2003, p.219) "content analysis is a technique for gathering and analyzing the content of text. The content refers to words, meanings, pictures, symbols, ideas, themes, or nay message that can be communicated". The so called direct way of content analysis was employed, that is those words or phrases that are physically present and counted rather than on the latent content which depends on the subjective judgment in order to lead to reliable results (Robson, 2010, p. 420-421; Leiss et al., 2008; Holstein & Gubrium, 1998).

The themes that were examined were associated with the existence of a Company's Website, the existence of a Website in English, the connection of Social Media (Facebook, Twitter), the existence of Google Map and live web camera in the official website, the promotion of Religious Sites Events and Activities in the official website, the presence of Links with other Private Tourism Stakeholders in the area and whether this is presented in the official website, and finally, the presence of Links with Public DMOs .

Table 2. Content Analysis of themes on 124 Arcadia Hotels' Websites in 2015

Themes' analysed	Companies	Percentage (%)
Existence of Company's Website	111	89.5
Website in English	90	72.5
Social Media Connection (Facebook Twitter)	46	37
Google Map	68	54.8
Existence of live web camera	12	9.6

Promotion of Religious Sites Events and Activities	81	65.3
Presence of Links with other Private Tourism Stakeholders in the area	43	34.6
Presence of Links with Public Destination Management Organisations	12	9.6
Reciprocal interaction between Public and Private Companies	0	

The content analysis of the 124 hotels in Arcadia, Greece, illustrated that 65.3% of the hotels promote religious sites, events and activities in their websites. Table 2 also illustrates that social media are not fully implemented to the degree that they could be used by hotel companies. Although ICTs all add to the image and reputation of a tourist destination (Mariani et al., 2014, p. 5) and OTAs are the most credible and the most able to influence tourists' choice, they are not exploited by the primary stakeholders in Arcadia. Taking the tourist demand side, the use of hotel listings accounts only of a 7.5% of the respondents (see table 1). In the supply side, according to the content analysis that took place in the websites of the hotels showed that 34.6% of the hotels joined coordinated activities to create synergies with other Private Tourism Stakeholders in the area (see Table 2) The limited effort of hotels to have an online presence and combine advertising communication activities (thus, creating a network) might also explain the limited use of hotel listings by tourists.

The authors also employed the method of interview. The use of multiple measures of the same construct pointing information in the same direction, allows for a better interpretation since different sources of evidence are used for the presentation of findings (Yin, 1993, p.69). Since the examination of networks is qualitative in nature (Scott, Baggio & Cooper, 2008), this study presents data collected from an interview held with the President of the Peloponnesian Tourism Organisation and President of the Arcadian Hotels' Association, Dr Marinakos in September 2015, as purposive or purposeful sampling is used when selecting people to interview because the sample is intentionally selected according to the purpose of the study (Salmons, 2012, p.14). It is important to note that the existing promotional material of the region taken from the Hotels' Association in Arcadia as well as the Hotels' Owners Association in Eastern Arcadia is written, produced and signed from one person only; he was in charge of advertising the region of Arcadia, Greece. That is why, interpretative phenomenological analysis was considered to be the most appropriate method since phenomenology is generally associated with individual accounts of a given domain of experience (Thompson, Locander & Pollio, 1989) and is associated with the close examination of the experiences and meaning-making activities of only one participant.

Although the President of the Association of Hotels in Arcadia, Dr. Marinakos, mentioned that "there are synergies with the public; for example, the Greek National Tourism Organization to a very high grade over the recent years through our collective bodies which is the main social partner in matters of planning and implementing tourism promotion policies of the region's tourism product" (personal interview in September, 2015), nonetheless, this does not seem to be appropriate, since only 12 synergies existed online as content analysis illustrated (Table 2), that is, a 9.6% of the hotels in the area.

Dr. Marinakos also referred to the official website for the Association of Hotels in Arcadia (www.hotelsarcadia.gr) which aims to promote products and services of hotels' members and to reinforce

the corporate identity of the institution in the inter-regional Tourist Agency of Peloponnese. Nonetheless, the researchers found out that the webpage automatically turns to <http://arcadiaimages.gr/> and only presents a few photos from the region but there is not a single reference to a hotel.

Dr. Marinakos also mentioned that “religious tourism is promoted as an interesting form of alternative tourism due to the richness of religious monuments”, (personal interview in September, 2015), a view which is in accordance with the results of content analysis of Table 2. The small percentage of hotels which is advertised through social media 37%, that is 46 hotels out of the 124 hotels in Table 2, was also verified by the President of the Peloponnesian Tourism. Weak cooperation between hotels, which seem to be unable to attract the interest of the tourists was also pointed out by Dr. Marinakos, as he admitted that: “Clusters have not developed to the degree that they could develop”, and “there is space for further development between related companies which is due to the lack of professionalism and cooperativeness” (personal interview in September, 2015).

Discussion and Conclusions

This research sheds light in the structure of networks and the role actors have within the network in the region of Arcadia, Greece. The promoters of the communication messages to visitors related to religious tourism need to take into consideration tourists’ and visitors’ perception of such promotion; marketers but also tourism policy makers should be informed about this target group to understand the communication channels they employ and enhance the services on offer for the provision of information to them.

In regard to the research question on whether there are networks created in regard to religious tourism in Arcadia, Greece, the researchers found out that they are extremely limited, if not existing at all, contrary to the significance that literature has attributed to it

(Katsoni & Dologlou 2017; Kavoura & Katsoni, 2013; Lemmetyinen & Go, 2010; Meriläinen & Lemmetyinen, 2011). Although collaboration is theoretically welcomed by most organizations from both the public and private sectors, there remains confusion with regard to respective roles and responsibilities for both sectors. Contrary to the literature which argues for centrality between entities and interaction between pairs of other nodes (Shih, 2006; Wray, 2009), the content analysis illustrated that there is not reciprocal interaction between private and public sectors in the area and it seems that the various stakeholders are not prepared to collaborate to develop and promote religious tourism. The content analysis illustrated that 34.6% of the hoteliers in the region initiate synergies that are visible in line with other Private Tourism Stakeholders in the area. The small percentage of respondents who used hotel listings (a form of network creation between hotels) and found interest in visiting religious sites in their vacation in Arcadia also verified the limited network existence as this is understood by the demand side. Although literature illustrates that social media are important resources in travelers' information search processes and play an important role in the travel planning process (Leung & Bai, 2013), only one third of the hotels in the region of Arcadia, Greece employ social media.

Since this research illustrated that destination network management is not in fact implemented and that the network does not really exist, the quantitative results of the findings argue for the dependence of visitors on the word of mouth as the most significant means of communication and advertising. The promotion of the region takes place via traditional marketing channels as is the word of mouth and only a small percentage of 37% of hotels is advertised through social media. There is lack of coordination of activities stemming from different sectors and associations. In fact, it was found out that only one person was in charge of the advertising of the region and its religious elements and he expressed both the public and the private sector's official perspective. The researchers also found that

there is very limited advertising on religious tourism, mainly in Greek language, with no revised editions neither in Greek nor in English.

A destination marketing strategy could be more effective if different key actors representing the various tourism stakeholders had created networks, thus, contributing in destination branding with the provision of a consistent and informed message via the means of various tourism distribution channels (Povilanskas & Armaitiene, 2010; Lemmetyinen & Go, 2010). Rather than basing their relations on competition, the actors involved in the promotion of the distinct characteristics of a destination, can offer and enhance the whole created system. Thus, an integrated approach can be the alternative for bringing those involved in the tourism industry together (Povilanskas & Armaitiene, 2010).

As Wight (2013) mentions “the role of National Tourist Organisations...is increasingly supported by the involvement of the private sector towards a collaborative and entrepreneurial set of values” (Wight, 2013, p.135). In regard to the Greek legislation, Public Private Partnerships (PPPs) allow for the cooperation of the public and private sector and constitute an important reform employing the existing framework of the public sector. PPPs yield important benefits for all involved stakeholders: the public sector, the country's citizens and the private sector, which now gains access to a new expanding market. This is the reason why PPPs are considered an important reform and a fundamental pillar for the development of the country (Greek Law 3389/2005, 2005). PPPs are based on European Directives (Directive 2004/17/EC; Directive 2004/18/EC). It was necessary to overcome a legal gap in Greece, which led each contractual agreement for a project co-financed by the private sector for ratification by the Parliament. Within the framework of tourism and Greece, it remains to be seen which will be the case with the effective application of the Greek Law and the future of tourism development in the country.

Some limitations of the study is that Internet use was treated in its general term in order to find tourists' ICT competence, so research was limited to tourists' general perception of the broad and generic Internet use. Furthermore, although social network theory argues that the attributes of individuals are less important than their relationships and ties with other actors within the network, the research was not applied to the latter field. Further research on the tourism stakeholders themselves could be of use to improve the relevance of the researchs.

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TOURISMOS

An International Multidisciplinary Journal of Tourism

AIMS & SCOPE

TOURISMOS is an international, multi-disciplinary, refereed (peerreviewed) journal aiming to promote and enhance research in all fields of tourism, including travel, hospitality and leisure. The journal is published by the University of the Aegean (in Greece), and is intended for readers in the scholarly community who deal with different tourism sectors, both at macro and at micro level, as well as professionals in the industry. TOURISMOS provides a platform for debate and dissemination of research findings, new research areas and techniques, conceptual developments, and articles with practical application to any tourism segment. Besides research papers, the journal welcomes book reviews, conference reports, case studies, research notes and commentaries.

TOURISMOS aims at:

- Disseminating and promoting research, good practice and innovation in all aspects of tourism to its prime audience including educators, researchers, post-graduate students, policy makers, and industry practitioners.
- Encouraging international scientific cooperation and understanding, and enhancing multi-disciplinary research across all tourism sectors.

The scope of the journal is international and all papers submitted are subject to strict blind peer review by its Editorial Board and by other anonymous international reviewers. The journal features conceptual and empirical papers, and editorial policy is to invite the submission of manuscripts from academics, researchers, post-graduate students, policymakers and industry practitioners. The Editorial Board will be looking particularly for articles about new trends and developments within different sectors of tourism, and the application of new ideas and developments that are likely to affect tourism, travel, hospitality

and leisure in the future. TOURISMOS also welcomes submission of manuscripts in areas that may not be directly tourism-related but cover a 236 topic that is of interest to researchers, educators, policy-makers and practitioners in various fields of tourism.

The material published in TOURISMOS covers all scientific, conceptual and applied disciplines related to tourism, travel, hospitality and leisure, including: economics, management, planning and development, marketing, human resources, sociology, psychology, geography, information and communication technologies, transportation, service quality, finance, food and beverage, and education. Manuscripts published in TOURISMOS should not have been published previously in any copyright form (print or electronic/online). The general criteria for the acceptance of articles are:

- Contribution to the promotion of scientific knowledge in the greater multi-disciplinary field of tourism.
- Adequate and relevant literature review.
- Scientifically valid and reliable methodology.
- Clarity of writing.
- Acceptable quality of English language.

TOURISMOS is published twice per year (in Spring and in Autumn). Each issue includes the following sections: editorial, research papers, research notes, case studies, book reviews, conference reports, industry viewpoints, and forthcoming events.

JOURNAL SECTIONS

Editorial

The Editorial addresses issues of contemporary interest and provides a detailed introduction and commentary to the articles in the current issue. The editorial may be written by the Editor, or by any other member(s) of the Editorial Board. When appropriate, a “Guest

Editorial” may be presented. However, TOURISMOS does not accept unsolicited editorials.

Research Papers

For the Research Papers section, TOURISMOS invites full-length manuscripts (not longer than 6000 words and not shorter than 4000 words) from a variety of disciplines; these papers may be either empirical or conceptual, and will be subject to strict blind peer review (by at least three anonymous referees). The decision for the final acceptance of the paper will be taken unanimously by the Editor and by the Associate Editors. The manuscripts submitted should provide original and/or innovative ideas or approaches or findings that eventually push the frontiers of knowledge. Purely descriptive accounts are not considered suitable for this section. Each paper should have the following structure: a) abstract, b) introduction (including an overall presentation of the issue to be examined and the aims and objectives of the paper), c) main body (including, where appropriate, the review of literature, the development of hypotheses and/or models, research methodology, presentation of findings, and analysis and discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, limitations, and suggestions for further research), e) bibliography, f) acknowledgements, and g) appendices.

Case Studies

Case Studies should be not longer than 3500 words and not shorter than 2500; these articles should be focusing on the detailed and critical presentation/review of real-life cases from the greater tourism sector, and must include - where appropriate - relevant references and bibliography. Case Studies should aim at disseminating information and/or good practices, combined with critical analysis of real examples. Purely descriptive accounts may be considered suitable for this section, provided that are well-justified and of interest to the readers of TOURISMOS. Each article should have the following

structure: a) abstract, b) introduction (including an overall presentation of the case to be examined and the aims and objectives of the article), c) main body (including, where appropriate, the review of literature, the presentation of the case study, the critical review of the case and relevant discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, and suggestions for further study), e) bibliography, f) acknowledgements, and g) appendices. All Case Studies are subject to blind peer review (by at least one anonymous referee). The decision for the final acceptance of the article will be taken unanimously by the Editor and by the Associate Editor.

Research Notes

Research Notes should be not longer than 2000 words and not shorter than 1000; these papers may be either empirical or conceptual, and will be subject to blind peer review (by at least two anonymous referees). The decision for the final acceptance of the paper will be taken unanimously by the Editor and by the Associate Editors. The manuscripts submitted may present research-in-progress or my focus on the conceptual development of models and approaches that have not been proven yet through primary research. In all cases, the papers should provide original ideas, approaches or preliminary findings that are open to discussion. Purely descriptive accounts may be considered suitable for this section, provided that are well-justified and of interest to the readers of TOURISMOS. Each paper should have the following structure: a) abstract, b) introduction (including an overall presentation of the issue to be examined and the aims and objectives of the paper), c) main body (including, where appropriate, the review of literature, the development of hypotheses and/or models, research methodology, presentation of findings, and analysis and discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, limitations, and suggestions for further research), e) bibliography, f) acknowledgements, and g) appendices.

Book Reviews

Book Reviews should be not longer than 1500 words and not shorter than 1000; these articles aim at presenting and critically reviewing books from the greater field of tourism. Most reviews should focus on new publications, but older books are also welcome for presentation. Book Reviews are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor and by the Book Reviews Editor. Where appropriate, these articles may include references and bibliography. Books to be reviewed may be assigned to potential authors by the Book Reviews Editor, though TOURISMOS is also open to unsolicited suggestions for book reviews from interested parties.

Conference Reports

Conference Reports should be not longer than 2000 words and not shorter than 1000; these articles aim at presenting and critically reviewing conferences from the greater field of tourism. Most reports should focus on recent conferences (i.e., conferences that took place not before than three months from the date of manuscript submission), but older conferences are also welcome for presentation if appropriate. Conference Reports are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor and by the Conference Reports Editor. Where appropriate, these articles may include references and bibliography. Conference reports may be assigned to potential authors by the Conference Reports Editor, though 239 TOURISMOS is also open to unsolicited suggestions for reports from interested parties.

Industry Viewpoints

Industry Viewpoints should be not longer than 1500 words and not shorter than 500; these articles may have a “commentary” form, and aim at presenting and discussing ideas, views and suggestions by practitioners (industry professionals, tourism planners, policy

makers, other tourism stakeholders, etc.). Through these articles, TOURISMOS provides a platform for the exchange of ideas and for developing closer links between academics and practitioners. Most viewpoints should focus on contemporary issues, but other issues are also welcome for presentation if appropriate. Industry Viewpoints are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor and by the Associate Editors. These articles may be assigned to potential authors by the editor, though TOURISMOS is also open to unsolicited contributions from interested parties.

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Forthcoming Events should be not longer than 500 words; these articles may have the form of a “call of papers”, related to a forthcoming conference or a special issue of a journal. Alternatively, forthcoming events may have the form of a press release informing readers of TOURISMOS about an event (conference or other) related to the tourism, travel, hospitality or leisure sectors. These articles should not aim at promoting sales of any products or services. The decision for the final acceptance of the article will be taken by the Editor.

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NOTES FOR CONTRIBUTORS

Manuscript Submission Procedure

Manuscripts should be written as understandably and concisely as possible with clarity and meaningfulness. Submission of a manuscript to TOURISMOS represents a certification on the part of the author(s) that it is an original work and has not been copyrighted elsewhere; manuscripts that are eventually published may not be reproduced in any other publication (print or electronic), as their copyright has been transferred to TOURISMOS. Submissions are accepted only in electronic form; authors are requested to submit one copy of each manuscript by email attachment. All manuscripts should be emailed to the Editor-in-Chief (Prof. Paris Tsartas, at ptsar@aegean.gr) and to the Editors (Prof. Evangelos Christou, at e.christou@tour.teithe.gr and Prof. Andreas Papatheodorou, at a.papatheodorou@aegean.gr), and depending on the nature of the manuscript submissions should also be emailed as follows:

- Conference reports should be emailed directly to the Conference Reports Editor (Dr. Vasiliki Galani-Moutafi), at v.moutafi@sa.aegean.gr.
- Book reviews should be emailed directly to the Book Reviews Editor (Prof. Marianna Sigala), at marianna.sigala@unisa.edu.au.
- Full papers and all other types of manuscripts should be emailed directly to the Editors (Prof. Evangelos Christou and Prof. Andreas Papatheodorou), at e.christou@tour.teithe.gr and a.papatheodorou@aegean.gr.

Feedback regarding the submission of a manuscript (including the reviewers' comments) will be provided to the author(s) within six weeks of the receipt of the manuscript. Submission of a manuscript will be held to imply that it contains original unpublished work not being considered for publication elsewhere at the same time. Each author of a manuscript accepted for publication will receive three complimentary copies of the issue, and will also have to sign a "transfer of copyright" form. If appropriate, author(s) can correct first proofs. Manuscripts submitted to TOURISMOS, accepted for publication or not, cannot be returned to the author(s).

Manuscript Length

Research Papers should be not longer than 6000 words and not shorter than 4000. Research Notes should be not longer than 2000 words and not shorter than 1000. Case Studies should be not longer than 3500 words and not shorter than 2500. Book Reviews should be not longer than 1500 words and not shorter than 1000. Conference Reports should be not longer than 2000 words and not shorter than 1000. Industry Viewpoints should be not longer than 1500 words and not shorter than 500. Forthcoming Events should be not longer than 500 words. Manuscripts that do not fully conform to the above word limits (according to the type of the article) will be automatically rejected and should not be entered into the reviewing process.

Manuscript Style & Preparation

- All submissions (research papers, research notes, case studies, book reviews, conference reports, industry viewpoints, and forthcoming events) must have a title of no more than 12 words.
- Manuscripts should be double-line spaced, and have at least 2,5 cm (one-inch) margin on all four sides. Pages should be numbered consecutively.

- The use of footnotes within the text is discouraged – use endnotes instead. Endnotes should be kept to a minimum, be used to provide additional comments and discussion, and should be numbered consecutively in the text and typed on a separate page at the end of the article.
- Quotations must be taken accurately from the original source. Alterations to the quotations must be noted. Quotation marks (“ ”) are to be used to denote direct quotes. Inverted commas (‘ ’) should denote a quote within a quotation. If the quotation is less than 3 lines, then it should be included in the main text enclosed in quotation marks. If the quotation is more than 3 lines, then it should be separated from the main text and indented.
- The name(s) of any sponsor(s) of the research contained in the manuscript, or any other acknowledgements, should appear at the very end of the manuscript.
- Tables, figures and illustrations are to be included in the text and to be numbered consecutively (in Arabic numbers). Each table, figure or illustration must have a title.
- The text should be organized under appropriate section headings, which, ideally, should not be more than 500-700 words apart. • The main body of the text should be written in Times New Roman letters, font size 12.
- Section headings should be written in Arial letters, font size 12, and should be marked as follows: primary headings should be centred and typed in bold capitals and underlined; secondary headings should be typed with italic bold capital letters; other headings should be typed in capital letters. Authors are urged to write as concisely as possible, but not at the expense of clarity.
- The preferred software for submission is Microsoft Word.
- Authors submitting papers for publication should specify which section of the journal they wish their paper to be considered for: research papers, research notes, case studies, book reviews,

conference reports, industry viewpoints, and forthcoming events.

- Author(s) are responsible for preparing manuscripts which are clearly written in acceptable, scholarly English, and which contain no errors of spelling, grammar, or punctuation. Neither the Editorial Board nor the Publisher is responsible for correcting errors of spelling or grammar.
- Where acronyms are used, their full expression should be given initially.
- Authors are asked to ensure that there are no libellous implications in their work.

Manuscript Presentation

For submission, manuscripts of research papers, research notes and case studies should be arranged in the following order of presentation:

- First page: title, subtitle (if required), author's name and surname, affiliation, full postal address, telephone and fax numbers, and e-mail address. Respective names, affiliations and addresses of co-author(s) should be clearly indicated. Also, include an abstract of not more than 150 words and up to 6 keywords that identify article content. Also include a short biography of the author (about 50 words); in the case of co-author(s), the same details should also be included. All correspondence will be sent to the first named author, unless otherwise indicated.
- Second page: title, an abstract of not more than 150 words and up to 6 keywords that identify article content. Do not include the author(s) details, affiliation(s), and biographies in this page.
- Subsequent pages: the paper should begin on the third page and should not subsequently reveal the title or authors. In these pages should be included the main body of text (including

tables, figures and illustrations); list of references; appendixes; and endnotes (numbered consecutively).

- The author(s) should ensure that their names cannot be identified anywhere in the text.

Referencing Style

In the text, references should be cited with parentheses using the “author, date” style - for example for single citations (Ford, 2004), or for multiple citations (Isaac, 1998; Jackson, 2003). Page numbers for specific points or direct quotations must be given (i.e., Ford, 2004: 312-313). The Reference list, placed at the end of the manuscript, must be typed in alphabetical order of authors. The specific format is:

- For journal papers: Tribe, J. (2002). The philosophic practitioner. *Annals of Tourism Research*, Vol.29, No.2, pp.338-357.
- For books and monographs: Teare, R. & Ingram, H. (1993). *Strategic Management: A Resource-Based Approach for the Hospitality and Tourism Industries*. London, Cassell.
- For chapters in edited books: Sigala, M. and Christou, E. (2002). Use of Internet for enhancing tourism and hospitality education: lessons from Europe. In K.W. Wober, A.J. Frew and M. Hitz (Eds.) *Information and Communication Technologies in Tourism*, Wien: Springer-Verlag.
- For papers presented in conferences: Ford, B. (2004). Adoption of innovations on hospitality. Paper presented at the 22nd EuroCHRIE Conference. Bilkent University, Ankara, Turkey: 3-7 November 2004.
- For unpublished works: Gregoriades, M. (2004). The impact of trust in brand loyalty, Unpublished PhD Tourismos. Chios, Greece: University of the Aegean.
- For Internet sources (if you know the author): Johns, D. (2003) The power of branding in tourism.

[Http://www.tourismabstracts.org/marketing/papers-authors/id3456](http://www.tourismabstracts.org/marketing/papers-authors/id3456). Accessed the 12th of January 2005, at 14:55. (note: always state clearly the full URL of your source).

- For Internet sources (if you do not know the author): Tourism supply and demand. [Http://www.tourismabstracts.org/marketing/papersauthors/id3456](http://www.tourismabstracts.org/marketing/papersauthors/id3456). Accessed the 30th of January 2004, at 12:35. (note: always state clearly the full URL of your source).
- For reports: Edelstein, L. G. & Benini, C. (1994). Meetings and Conventions. Meetings market report (August), 60-82.

ⁱ Based on the OECD TSA framework (OECD 2000)

ⁱⁱ See <http://www.hersonisos.gr/municipal/tourism/tourism-satellite-accounts.html>

ⁱⁱⁱ WTTC's *Travel and Tourism economic impact analysis reports* (claimed in previous years to be a product of "simulated TSAs") for Greece are not mentioned, as their research on countries do not constitute a TSA and should not be considered a TSA replacement, as denoted in their website's methodology section (see <https://www.wttc.org/economic-impact/country-analysis/methodology/>)

^{iv} Based on the first EC-OECD-UN-WTO TSA framework (Commission of the European Communities et. al. 2001)

^v The project was developed as part of the overall project *Development and Operation of an Integrated Information System (IIS) for Strategic Tourism Planning: Tourism Satellite Account (TSA) and Observatory*, EU-financed within the Operational Programme *Information Society* of the 3rd Community Support Framework.

^{vi} The specific report as well as the rest documentation of the SRSS project files is available at the official site of Ministry of Tourism (<http://mintour.gov.gr/doryforos-logariasmos-toyrismoys->

[dynatotites-kai-anagkes/](#)) under the title *Tourism Satellite Accounts: Potentials and Needs* as well as by the authors.

vii Beneficiary agent of the Structural Reforms Support Service was the Greek Ministry of Tourism. More specifically, the TSA project was undertaken within the framework of the EU-funded *Technical Assistance action to support tourism planning and policy for the promotion of sustainable tourism development in Greece*, and particularly within the Activity I.1.1: “Develop monitoring and reporting tools for Greek tourism: a national accounting and statistical system” of the Component 1, “Tools for strategic policy making”.

viii The criteria for characterizing a product as a TCP are analyzed in IRTS 2008, par. 5.10

ix NACE, the official statistical Classification of Economic Activities in the European Community – From the French, *Nomenclature Statistique des activités économiques dans la Communauté européenne*. The Revision 2 is the latest used.

x CPA, the official statistical Classification of Products by Activity in the European Economic Community. The 2008 version is the latest used.

xi COICOP-HBS (Classification Of Individual Consumption by Purpose adapted to the needs of HBS)

xii Although services of travel agencies related to transportation or tourist guide services might be used, e.g. booking bus trips and the use of a guide.

xiii TGT: Technical Group Travel - a special working group for travel balance of payments set up by the European Statistical Service (Eurostat).

xiv see methodology in BoG’s Economic Bulletin No 27, July 2006, p.70 at

<http://www.bankofgreece.gr/BogEkdoseis/econbull200607.pdf>

xv The proportion of total domestic supply accounted for by internal tourism consumption, per product and in total.

xvi Tourism direct gross value added (TDGVA) is the part of gross value added generated by tourism industries and other industries of the economy that directly serve visitors in response to internal tourism consumption.

xvii Tourism direct gross domestic product (TDGDP) is the sum of the part of gross value added (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net

taxes on products and imports included within the value of this expenditure at purchasers' prices.

^{xviii} see

http://www.bankofgreece.gr/Pages/en/Bank/News/PressReleases/DispItem.aspx?Item_ID=5293&List_ID=1af869f3-57fb-4de6-b9ae-bdfd83c66c95&Filter_by=DT

^{xix} see <https://www.bankofgreece.gr/en/statistics/external-sector/balance-of-payments/balance-of-goods>