



Universitat de Girona  
**Institut de Recerca en Turisme**

## · Evaluation Report

MEDUSA PROJECT



## Introduction

Analyzing tourism's life cycle is a complex task, there are many internal and external factors that are continuously affecting its course (Butler, 2004), making it hard to forecast, as it very often produces outcomes with different reliability (Baggio & Corigliano, 2008). There are many predictable but also unpredictable circumstances (Makridakis & Taleb, 2009), that can change the projection of tourism, sometimes unexpectedly. The analysis of the impact of the COVID-19 pandemic has been as complex as many other crises.

Due to the nature of this complexity that the study of tourism implies, the analysis of the elements that contribute to these peculiar characteristics can be very insightful. In a study of the COVID-19 Pandemic; Aldao, Blasco, Espallargas and Rubio (2021) identified 8 different dimensions of impact: psychological, healthcare, social, economic, cultural, technological, environmental, and political perspectives. Using the resilience cycle model 4 stages (Lew, Cheer, Haywood, Brouder & Salazar, 2020): collapse of the system, re-organization, growth, and consolidation the researchers were able to shed light on important measures that can be considered to mitigate the impacts of these types of crises in the future. For example, by incorporating environmental strategies and initiatives to foster innovation and increase awareness towards a greener and more balanced tourism to facilitate resilience actions in the industry (Ioannides & Gyimóthy, 2020). This can contribute to the creation of tools that can help us overcome disruptive events in the future and create effective solutions.

The pandemic has also impacted on the behavior of tourists, four patterns have been identified since the covid outbreak (Donaire, Galí & Camprubi, 2021). The first pattern is related to the choice of destination, people showed to avoid dangerous or risky destinations, crowded places to reduce risk of contagion (Wen, J.; Kozak, M.; Yang, S.; Liu, F.) and instead sought natural areas close to home. Tourists chose to avoid two types of destinations: large urban destinations and popular coastal spots where mass concentration is common (Donaire, Galí & Camprubi, 2021). However, natural spaces became more crowded than before as tourists perceived these types of destinations as a healthier environment promoting domestic tourism (Higgins-Desbiolles, 2020).

This is a perfect scenario for destinations offering nature and adventure tourism like the MEDUSA areas do.

The second pattern identified were the duration of the trip, visitors seemed to feel safer by shortening their length of stay to reduce the risk of contagion or due to the decline in their buying power. The mode of transport has also been identified as creating a new pattern of behaviors, many destinations have set very strict restrictions for visitors, many airports closed, and other airlines temporarily put their operations on hold. International Air Transport Association numbers show that international passengers demand was 75.6% lower in 2020 compared to the previous year. Furthermore, the way people travel has also changed due to the pandemic. Four main factors have been detected in connection to this behavior: 1) the risk perception of tourists (Bae, Chang & P.J., 2020); 2) distance to the destination (Qiu, Park, Li, Song, 2020); 3) destination marketing strategies and 4) management policies implemented at the destination during the crisis (Higgins-Desbiolles, 2020).

Thus, new ways of obtaining information to use in defining tourism strategies is indeed needed. Even more in nature and adventure tourism destinations with no mass tourism, and small-scale stakeholders. This is also the main profile of MEDUSA pilot areas.

The UNWTO has identified opportunities for the tourism industry despite the negative effect of the pandemic. "Tourism has the potential to recover and once again establish itself as a key part of national economies and of the wider sustainable development agenda. This crisis may also offer a unique opportunity to shape the sector to ensure it not only grows but it grows better, with inclusivity, sustainability and responsibility prioritized. Furthermore, to build for the future, special attention should be placed on building resilience and on promoting sustainability at all levels". (UNWTO, 2020b, p. 33).

Nature and adventure tourism activities have a direct relationship with the local community, its environments, and is an alternative to integrate traditions and customs without harming the environment, and its residents and attractions and can become the pathway to sustainability, to resilience, and to a regenerative tourism for the future.

All this introduction helps in driving the whole results of this process to the main goals of the MEDUSA project. In this regard, special attention was devoted to answer:

- a. Increased attractiveness of less known tourism destinations
- b. Increased diversification of tourism offer through the promotion of local and territorial assets / drivers especially in off season periods.



## Set of Monitoring and Evaluation indicators

To collect and analyze tourism data from different countries and different kind of destinations, it is important to develop indicators that are adapted to the different tourism existing realities. Current standard indicators, like the European Tourism Indicators System (ETIS) present a Western approach that very often does not correlate with the reality of non-Western countries. Moreover, the actual systems of indicators are thought for countries that have well-developed statistical systems, and destinations with mass tourism activity where data can be more easily obtained. In contraposition, less known tourism destinations that do not have high volumes of tourism and countries without permanent and extensive data-archives cannot benefit from the standard indicator's systems.

Data collection is costly, not only in monetary terms but also in time consumption. It is quantitative data that is used in these systems, which means that destinations with reduced number of tourists, like slow tourism destinations, have additional sampling problems. In addition, experience shows that most of the emergent and non-mature destinations don't have the resources needed for data gathering and to keep data systems. That is why we need to think new ways of obtaining data, and reliable systems for such destinations and in such circumstances.

After further evaluation of all ETIS indicators, we conclude that it is necessary to design a new system of indicators that focus on current tendencies observed in the destinations regarding key tourism aspects, and on identifying their intensities in terms of growth, stagnation or decline, and on which future predictions and decisions can be made by destination managers. Our aim then is the structuration and development of a new indicator scheme to facilitate data-driven decisions and improve tourism strategies for under-developed destinations and those that do not have a Western approach tradition to tourism data gathering and analysis.

### Description of the MEDUSA previous tasks

MEDUSA is a research project that take as reference a set of sustainability indicators developed under the European Tourism Indicator System (ETIS) which were meant to be applied to several tourism destinations partners of the project, as pilot tests of their implementation. Most of the destinations involved in the project are non-European, so the ETIS was never used beforehand. Furthermore, the destinations involved in the project are less known and aimed at getting further developed in terms of nature and adventure tourism frameworks.

The attempts to apply ETIS indicators did not work in these destinations (see the initial project indicators list below), and due to these difficulties, the University of Girona (UdG) led this sub-project to develop a new system of indicators fit for these cases.

We, then, developed a new list of indicators (See new set of qualitative indicators below), in line with the indicators developed for a similar and parallel project MED Pearls. The connection between these two projects is evident and the results combined are much more solid.

We tested those indicators, and we discussed them with the project partners, but also with DMC's located in those destinations and with their regional DMO's, and NGO's linked to tourism development.

The result is displayed below, and the last step consisted of inviting a selected group of academic and practitioner experts worldwide to comment and advice on these results so that based on this feedback we could produce a final system of indicators for their implementation in the destinations participating in the project, which may be later on also implemented in similar types of destinations.

## Initial Project Indicator's based on ETIS

### 1. DEMOGRAPHICS

#### 1.1 Population.

1.1.1. Total number of residents in the area

### 2. ECONOMIC

#### 2.1. Economic structure

2.1.1. Distribution of the Economically Active Population by sex and age

2.1.2. Employment rate in tourism

2.1.3. Unemployment rate in the area

#### 2.2 Economic impact of tourism activity

2.2.1. GDP generated by tourism in the area

#### 2.3. Structure of the tourist demand

2.3.1. Number of tourists by origin (TOTAL)

2.3.2. Average stay of the tourists (overnight)

2.3.3. Average spending per tourist (per day)

2.3.4. Number of day visitors

#### 2.4. Structure of the tourist offer (official accommodation only)

2.4.1. Number of tourist companies (accommodation)

2.4.2. Number of beds available

2.4.3. Total number of overnight stays in the area

#### 2.5. Seasonality

2.5.1. Enlargement in the accommodation sector during the season (two weeks)

2.5.2. Average occupancy rate per season

### 3. SOCIAL

#### 3.1. Income level of the population

3.1.1. Average salary income of the population.

3.1.2. Family income of the population

#### 3.2. Quality of life of the inhabitants

3.2.1. Availability of housing in the area

3.2.2. Level of Education

3.2.3. Index of Mortality

#### 3.3. Social Equity

3.3.1. Reduction of differences between the average wage of women and men

#### 3.4. Employment

3.4.1. Total number of employees with a fixed contract (affiliated to the Social Security)

Increase in the 2% between periods

3.4.2. Total number of employees (full-time/part) Increase in the 2% between periods

#### 3.6. Environment

3.6.1. Degree of conservation of the spaces (landscape)

3.6.2. Studies of carrying capacity

### SPECIFIC INDICATORS IN PILOT AREAS

#### 7. TRANSPORT

7.1. Public transport

7.2. Transport infrastructures

7.2.1. Airports nearby.

7.2.2. Bus station.

7.2.3. Train station.

7.2.4. Electrical charging points.

#### 8. INTERNET CONNECTIVITY

8.1. Type of connection

8.2. Quality of connection

8.3. Number of connections

#### 9. NUMBER OF TOWNS INVOLVED

#### 10. NUMBER OF NATURAL ASSETS

#### 11. NUMBER OF CULTURAL ASSETS

#### 12. NUMBER OF EVENTS DURING A YEAR (CULTURAL)

#### 13. SUSTAINABILITY

13.1. Area of Tourist Influence

13.1.1. Number of slow tourism experiences sold by local companies

13.1.2. Number of tourism routes (cycling, hiking, gastronomic, cultural...)

13.1.3. Increase of the percentage of destination area under an environmental management and monitoring plan

- 16. KEY TOURISM PLAYERS (Stakeholders) in the pilot area
- 17. SLOW Tourism

- 18. TOURIST INFORMATION POINTS
- 19. ACTIONS TO PROMOTE SLOW TOURISM EXPERIENCES

Initially the structure of the indicators' system was close to the ETIS standard, but the indicators were adapted to the projects according to their thoughts.

Initially, the indicators were distributed in the three main areas of sustainability, together with an additional sub-structure of indicators to deal with sustainability issues specific of the project's destinations. Nevertheless, it can be observed from the previous list, that environmental indicators were mixed in between economic and social, or economic indicators of different origins are also mixed. Furthermore, some indicators in the list were not real indicators like number 17. In addition, other indicators were not even applicable to most of these destinations, as is the case of 7.2.4. or they were culturally difficult to implement, e.g. the distribution of female working population in countries where women are not counted as part of the workforce.

Due to all these issues and problems, we developed a table in which we confronted the project indicators and the intention the partners had when developing them, with the ETIS indicators planned to obtain the same data, and the qualitative indicators developed by us. The reason to develop this exercise was to assure that the information wanted is collected and treated, and to guarantee a certain level of comparability with the western standards.

Having this in mind, we have developed the following structure of qualitative indicators based on perceptions of key stakeholders about key developments in selected tourism areas. It becomes a system of questions for key stakeholders to answer. The main premise is that the destinations can collect themselves the information, following a guide that we are developing.

With these new qualitative indicators, it is expected that the information that originally was meant to be obtained with the quantitative system of indicators above, and that proved to be unfit, can finally be obtained with the new indicators' system instead. A few of the original quantitative indicators can be preserved, when for instance, data exists at country level, from which a proxy indicator at local and regional level can be reliably inferred, e.g. demographic data.



## New set of qualitative indicators

### Economic Sustainability

- Which are the main origin markets of your visitors/consumers?
- How much longer are they staying this last season compared to the previous seasons?
- How much more (or less) are they spending compared with previous tourists in past seasons?
- Are there more accommodation options than in the previous years?
- % of daily visitors vs tourists, as perceived by the respondent?
- Which is the number of products sold by your company in the recent season? Has it increased, decreased, or remained similar as in the previous seasons?

#### Specific questions for DMC's

- Average of daily cost for a package.
- Number of packages sold last year. Has it increased, decreased, or remained similar as in the previous seasons?

### Social Sustainability

- How easy (or difficult) is to find people to cover job positions in Tourism and Hospitality in the destination?
- Did the salaries of your employees increase, decrease, or remain similar as the previous year?
- Have your workers (or workers of the tourism sector) special skills for their position?
- Which level of education do the employees working at the DMC's have.
- How many employees has a permanent contract. Has it increased, decreased, or remained similar as in the previous seasons?
- What is the total number of employees (full-time/ part time). Has it increased, decreased, or remained similar as in the previous seasons?
- What is the number of actors you have to collaborate with for your products to be ready for the market (suppliers, etc). Has it increased, decreased, or remained similar as in the previous seasons?

### Environmental Sustainability

- Total number of hectares considered protected areas, natural parks, in the destination
- Is there any protection plan or policy regarding the natural or cultural spaces in the destination?
- Which are the months your business is open to visitors? Has it increased, decreased, or remained similar as in the previous seasons?
- How difficult is it to create tourism packages using public transportation?
- Number of towns/ municipalities included in your tourism packages.





- Number of tourism routes commercialized by DMC's (cycling, hiking, gastronomic, cultural...)
- Who are the more and the less active stakeholders in your area?
- What is it missing in your destination related to tourism? (Information, infrastructures, promotion, ...)

In following chapters of this document, you will be able to check the results obtained using this new system.

## Baseline Report

The main aim of this chapter is to compare the data of the 5 different countries involved and more precisely the data from the 10 areas or destinations included in the MEDUSA project. The intention is to compare the actual data with the last available tourism figures before the pandemic and see the relevance for the nature and adventure destinations. You will be able to check the quantitative data collected opening the attached excel file to this deliverable.

The development of a set of indicators that will facilitate the collection of data and proper information is important to accelerate the adventure tourism approach in the pilot areas participating in the project. Current indicators present a western approach that does not correlate with the reality of less touristy developed destinations (non-mass tourism) and is not adapted to the reality of these tourist spots. These pilot areas do not possess an extensive data archive and are not yet advanced/familiar with the process of tourism data gathering. The process of data collection can incur expenses and it can be time-consuming, optimizing the process to gather information in an easy and efficient way can bring valuable benefits to the analysis of the results.

The tourism cycle is constantly changing, and for that reason, the collection of data plays an important role in the decision-making process to make a destination successful in its touristic approach. Apart from providing credibility, it also facilitates future predictions and can help prepare destinations for unforeseen events. The restructuring and development of a new indicator scheme will facilitate data-driven judgment and can help improve touristic strategies for each destination in order to align those with the tourist's needs and demands. Furthermore, it can facilitate the correct interpretation of the information gathered and it can give opportunities for future research. For that reason, we have decided to divide all indicators into three main categories: economic, social, and environmental, with the purpose of creating a framework that can facilitate the evaluation of the impact of the MEDUSA project in these areas and the effect of slow tourism in order to achieve our main goal: to facilitate the collection of reliable and comparable data.

The original indicators focused on the collection of data based on general standards associated with a mass tourist destination. Nature and adventure tourism is working on generating completely the opposite effect, to avoid massification in these areas. An evaluation of all indicators was set, and a methodological framework was created in order



to identify and highlight current tendencies, identify uptrends, downtrends, and stagnation, and allow trend analysis and facilitate future predictions.

Collecting information about the countries involved in the project will not necessarily provide valuable insights regarding the pilot areas. Each location presents different challenges that are not always reflected in the national data. For example, the number of electric cars stations will not provide information about sustainability in a pilot area where not even public transportation or Wi-Fi connection is available, and the number of economically active citizens by gender won't provide any relevant information when in some of these countries women are not working officially, the number of visitors in a destination will not necessarily provide the information on how adventure tourism was experienced or the quality of the resources available to create memorable experiences for visitors to connect with the local culture. Therefore, each pilot area must be addressed with a common framework, but a single lens.

Covid-19 aside, one of the main challenges that most of the pilot areas face is the lack of resources they have for data gathering, this should be taken into consideration when creating indicators, otherwise, the collection of data won't be successful, efficient, and beneficial. It is also very important to create indicators that can provide the right information to develop slow tourism in a way that will contribute to the development of touristic packages and generate a positive impact in these regions.

The old indicators setlist focused on collecting data from very big destinations where tourism is advanced in comparison to the pilot areas studied, tailor-made indicators for tourist spots with similar characteristics will allow quality information gathering. This new approach will also facilitate gathering data procedures and it will offer functional standards for the measurement of the project performance, as well as customs indicators specifically created for the successful analysis of tourism information in these specific locations.

Thus, to achieve the main aim, all the quantitative data available in the different countries and project areas was collected. We also included the available information from the Med Pearls project, making the picture more global. Even if some of the countries coincide among the two projects, the pilot areas were different which brings a bigger and more reliable result.

This data can be observed in the excel file attached to this deliverable. The comparison between 2019 and 2021 was made, having in mind that not all countries have similar data to be compared. Nevertheless, it is crucial to mention that only observing two periods of data is nearly impossible to extract reliable conclusions. Furthermore, it needs to be mentioned that 2021 was the last year with available data, and it still was under the effects of the global pandemic. So, this makes it not relevant for deep analysis in normal tourism circumstances.

Therefore, the indicators list has been reevaluated and restructured under this framework. The weight of the data collection to analyze new trends, and topics, has been gathering qualitative data instead of quantitative. The main goal for that methodological scope is to understand the quality of the service provided and the quality of the experience rather

## **MEDUSA**

than the capacity of these tourism spots. The use of qualitative methodology helped to understand the need of tourists to enhance new products that will enable them to experience the destination in full, prolong their stays and deepen their connections with the local environment. Applying the qualitative approach for that purpose will highlight current tendencies to identify uptrends, downtrends, and stagnation and will allow trend analysis and facilitate future predictions.

Adapting these indicators for destinations less developed will help them in the process of creating their own plan of action to achieve big results in the long run.

## Evaluation Report

The main aim of this document is to explain how the new proposed indicator system was evaluated, reviewed, and modified accordingly. Conducted interviews were used to obtain data about the Medusa project performance in a qualitative manner. The results of this phase of analysis are now explained. In addition, the last part of this evaluation report also integrates data obtained from the research conducted for the Med Pearls project, which coincides in methodology and the main part of the areas analyzed. In this regard, and talking with the responsible members of the Medusa partnership, we agreed that adding both details will generate clearly additional benefits to the Medusa family.

Three main steps were conducted as agreed during our regular meetings with the project partner in charge of the execution. The first one was the execution of personal interviews with relevant people of the pilot areas. The second one was to double check the system and the results using a panel of worldwide experts. The third one was to generate a guidelines document to facilitate the further development and monitoring of the proposed indicators in a way that the destinations can self-create their information system. Thus, we structured this deliverable following that structure.

## Semi-structured interviews

Twelve semi-structured interviews were carried out among the Medusa partners, to identify the trends, uptrends, and downtrends in the Adventure Tourism activities, in the pilot areas.

Interviews were done between November 2022 and January 2023, with a length of about one hour each. Public and private stakeholders from the pilot areas were interviewed, and also two NGO's involved in the tourism development of the areas.

After the analysis of the data and the review of the literature about the adventure tourism activities and the post-pandemic scenario, eleven categories were raised from the qualitative data, named:

(i) The Covid 19, (ii) Sustainability, (iii) Education, (iv) Stakeholders, (v) Collaboration, (vi) Seasonality, (vii) Employability, (viii) Markets, (ix) Public Transportation, (x) Impacts of the project and (xi) proposals to improve

The eleven categories are presented as follow.

## (i) COVID 19

In this category, results are aligned with the literature review, and with the global situation due to the restrictions in terms of mobility.

In all pilot areas of the project, international tourists were not able to reach the destinations, and domestic tourism took place in all the regions.

For some of the areas, this was not a weakness because they rely on domestic tourism before, instead, they had an increase in tourism because they were not able to travel abroad, therefore their numbers increased during the pandemic years.

Interviewees agree on the fact that during the pandemic days, and by necessity, certain practices were applied, and consumers were also more aware of certain issues, but by risk perceptions and safety, in terms of hygiene.

In general terms, after the interviews, there is an agreement that nothing has changed much. New practices were applied during the pandemic, by necessity, but after, when regulations were not in place again, consumers and companies went back to the previous behavior of before the Covid -19. Others coincide that domestic tourism increased during the pandemic, but after, people changed the destination again, willing to travel by plane again.

“People are less aware after covid, navigation of recreation boat has increase, waste”.

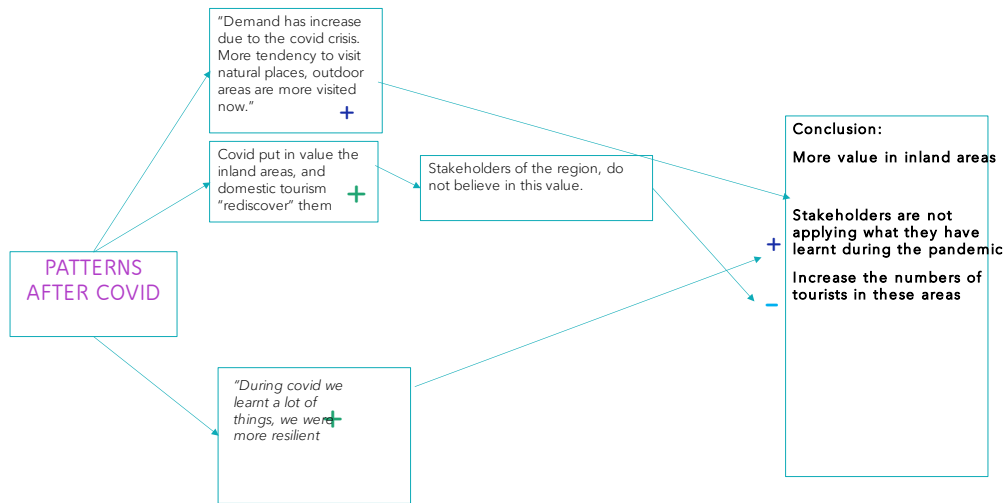
“During covid we learnt a lot of things, we were more resilient, but now all, we have forgotten about these practices, and we want to catch a plane, whereas is not sustainable”.

“Covid put in value the inland areas, and domestic tourism “rediscover” them, but now, it is again difficult to maintain this value. Mainly because stakeholders of the region, do not believe in it either”.

“Demand has increase due to the covid crisis. More tendency to visit natural places, outdoor areas are more visited now.”

Thus, the general feeling observed is that nature and adventure tourism helped during the pandemic, but now consumers and also stakeholders are going back to the previous standards.





## (ii) SUSTAINABILITY

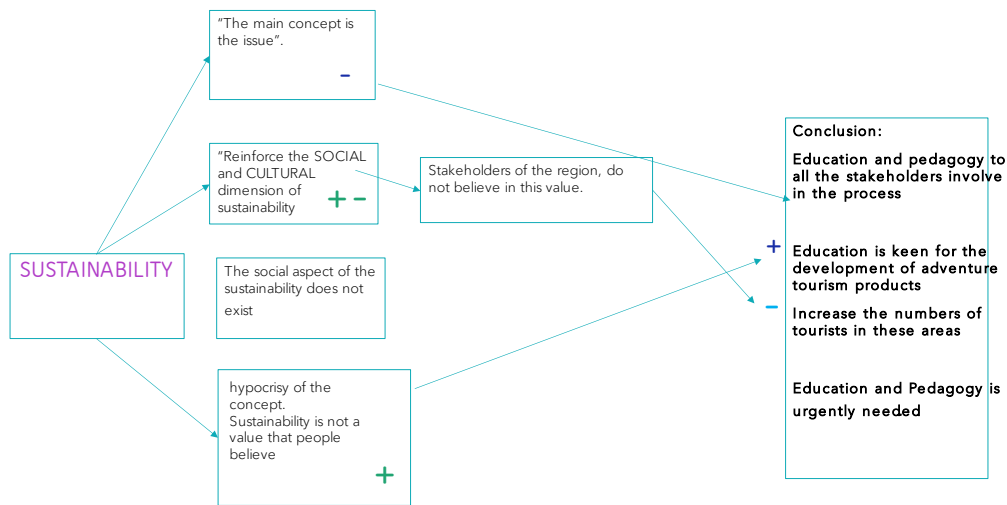
For some respondents, one of the main issues is the Sustainability concept itself. They believe that the concept, sometimes is misunderstood, or stakeholders are not aligned with the values, and this should be different.

“Problem, Sometimes, from the DMOs we do not know how to engage regions to be part of this change, the sustainability”.

“How to engage the region” if not with money? This is keen, and how the region can coordinate all this process”.

“The lack of work in the country, combine with the bad use of the natural resources is a bad combination to create tourism product related to the adventure, which are mainly outdoor, in natural areas. Service providers do not care about the environment; thus, the sustainable concept is not understood. They only see money, and are not oriented in the long term, or in sustained the activity in a long term, they do not have this in mind”.

Those sentences give light in terms of how difficult is to engage the tourism agents into the sustainability of the destination.



Hereafter you can see the possibilities to reinforce the values and the positive effects of sustainability.

“Attract the sustainable tourist, it is a recovery strategy at a country level, to diversify the offer which is concentrated in cultural heritage”.

“Reinforce the SOCIAL and CULTURAL dimension of sustainability, the environmental and the economic. Education and Pedagogy is urgently needed.

“Re-educate the concept Value versus Price”.

“Cultural concept is also an issue. Nature, gastronomy, way of living is also culture, but stakeholders do not believe in that”.

“Feeling of hypocrisy of the concept. Sustainability is not a value that people believe, of integrated in the values. Now, sustainability sales”.

How sustainability meets nature is also an issue, with difficulties, challenges and opportunities.

“Bad use of the natural resources the past years, especially with the extraction of copper in the past years in the natural reserves, there is a policy to change this, but is difficult”.

“At a governmental level, there are no plans to preserve the natural areas”.

“One plan exists to preserve nature but is based on economic incentives to the companies and to the operators.

“The social aspect of the sustainability does not exist. At governmental level, they only promote the cultural heritage, but not the social or nature based, which is also cultural.



“They have identified a need to protect and preserve the natural areas. They believe that their region is not taking into consideration at governmental level, and they are worried. Their guests are concern, and they value their area but not the region itself. They are claiming to declare it Biosphere area for the past years, without succeeding”.

### (iii) EDUCATION

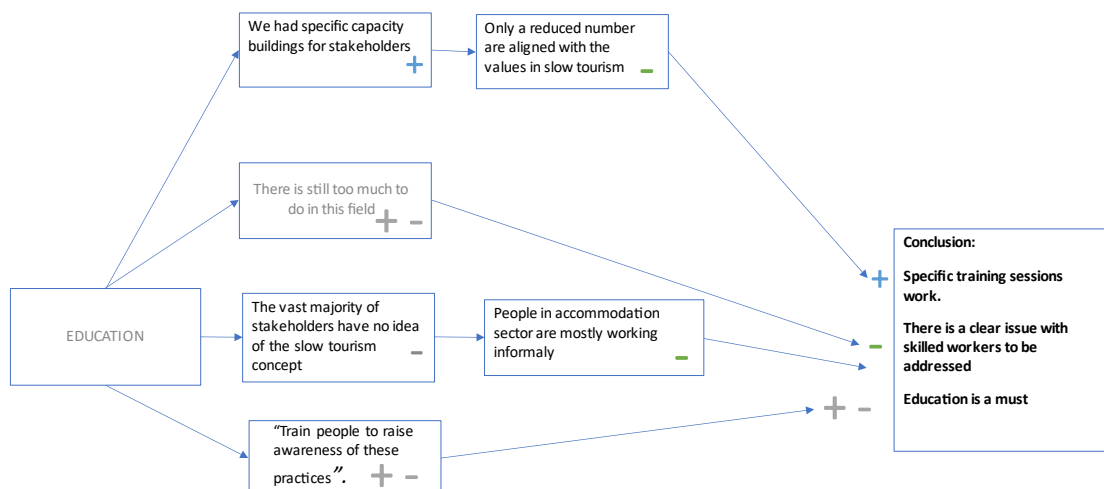
This misconception or misunderstanding of the concept, and its three main dimensions, lead us to the need of more Education at all levels. As the participants were also mentioning as follows.

“Education is keen for the development of adventure tourism products, especially through the guides, who provide the services to tourists”.

“A two-year course for local guides has been implemented to 44 people, but we need more”.

“The idea is that TTOO will have to deal with the guides, and the guides will have the power to adjust products, in a more sustainable way, and TTOO will need to follow the guides advice, if not they cannot operate”.

“This is a good opportunity to work towards sustainability, but there are only 44 people, and more trained guides are needed to cover all the demand”.



“Educate services providers in terms like collaboration is very hard in the area”.

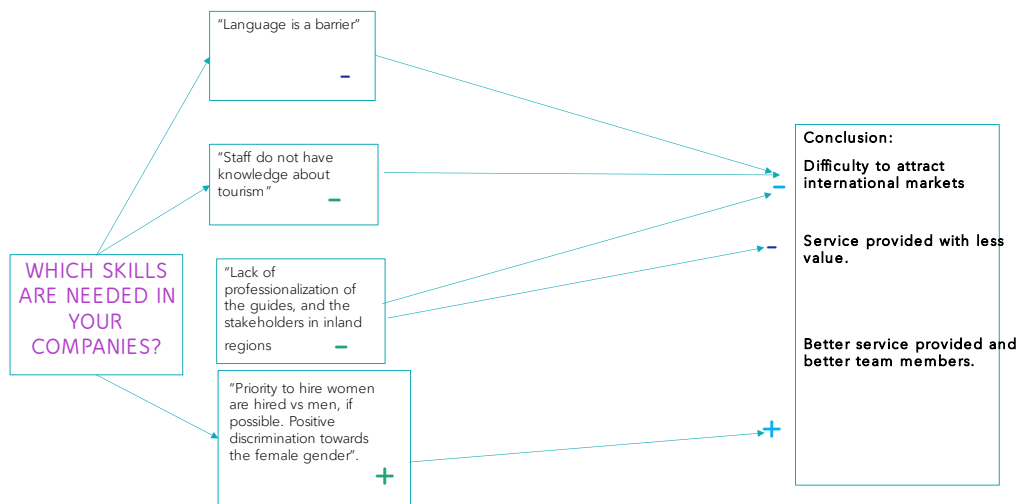
“Public bodies encourage collaboration, but is not seen as an effort, if not as they are no doing anything, creating capacity building projects”.

“Educate stakeholders in the value concept vs the price”.

**MEDUSA**

“Courses are seen as a burn out for small companies, they are not doing courses, they feel is an obligation and they are lacking time”.

“Online courses during covid were seen ok, but not after it”.



As can be observed, some trainings have been implemented already but very limited. And more education in quantity and more in variety needs to be implemented in the present and future to meet the needs of the sector. Public bodies are seen as the main providers.

### (iv) STAKEHOLDERS

Educate stakeholders is a priority for many of the interviewees, from public and private bodies, as seen above, to improve daily operations of all, and have an impact at region level in the economic, social, and environmental dimensions of sustainability. Some of the difficulties identified are the following. First you will see the needs in terms of private stakeholders.

“Better level of management is needed”.

“Stakeholders need to improve how they provide their services”.

“They are not willing to pay the commission to the DMC, this increases the difficulty to create packages”.

“They do not see the value of the DMC’s”.

“There is a limitation in the area in terms of stakeholders, there are few, with few expertise on the topic “.



“In inland areas, inhabitants see people from the city as foreigners. Very difficult to cooperate in that sense”.

“Lack of professionalization of the service providers. They are backers, shepherds, ...”.

“Simple service providers but in need of support, to meet the visitors needs and their expectations”.

“People are not experienced, usually are housewife’s who are entrepreneurs, taking care of these new activities”.

“They need training, but they are willing to develop their services to generate more revenues from these areas and present their regions and cultures in the best possible ways”.

As per the public stakeholders, other issues have been noticed, mainly in marketing and promotion strategies.

“The region publishes and gather data of the incoming tourist, but they are not including the adventure tourism on the results”.

“Tourism and nature are priorities of the government”.

“Huge problem in Marketing strategies, and marketing budget for all the regions. As a DMO you cannot always support all the activities due to the annual budget”.

“Promotion is very important and support from the government is needed, although there are strategies to promote sustainable tourism, still have not been implemented very strongly”.

“For one of the interviews from the public sector, the key is to create a new model, an Ecosystem which includes the values of sustainability in all the operations, but this is long term oriented, and private companies are oriented to the short term, sometimes only seen the economic dimension of sustainability, and not the social or cultural”.

“Public bodies have limited budget. Everyone expects from them a certain amount of money, and this is not feasible”.

The interviewees have highlighted the main limitations of the stakeholders in general, but what it is clearly the main critique is the lack of approach close to the nature and adventure reality.



## (v) COLLABORATION

After identifying the weaknesses and strengths with the stakeholders, a new category raised among the interviewees which is directly related with the previous one. Collaboration among all the stakeholders and agents participating in the creation of the products. Due to the number of comments related to this collaboration it can be said that its relevance is clear.

“Collaboration with private agents and stakeholders is very important, as there is no public budget for everyone, how can both stakeholders can join resources”.

“Private collaboration – short term oriented, requires money, and marketing actions”.

“Public collaboration – incorporation of the SDGs goals, and the sustainability values at all levels”.

“Need to work with other business, stakeholders not only in the tourism sector, but in the primary to preserve the natural areas. Lack of sensibility, in collaboration with all the agents in the region”.

“DMO in the region should monitor and follow up the collaboration among the stakeholders of the region, to grown as a niche tourism”.

Trust is a key issue when you talk about collaboration. This is one of the elements that stakeholders know and take into consideration.

“Collaboration with other stakeholders appear because you know them, and both companies have the same values. Without that is very difficult to work towards sustainability and believe what you are doing, is important for people not only for those who are visiting the area”.

“Not willingness to work with DMCs, the value added sometimes is difficult to understand for certain services providers. Opportunities are lost because of that”.

“Female’s entrepreneurs. For this only fact, collaboration is easier rather than with males, especially in natural areas, due to the sensitive issues and because, it is somehow harder. We see each other’s. As simple, or silly it may sound, helps to start collaboration and creating new relationships at business level, and to create and develop new projects as well”.

“Collaboration to create the inventory of spots is at all levels good”.

“Involve the community in different projects is our goal, to transform the area into a Cultural area is important for the community and for the demand visiting it”.

Once collaboration is achieved, cooperation is the next step to be followed. The main difference is a higher level of trust, and the design of common goals in a longer term.



“Share knowledge and a different model will arise”.

“How to create a good Ecosystem where all agents are willing to participate” not an easy task, but not impossible”.

“Thanks to MEDUSA project, natural parks were targeted, and two years from now, it is planned to Improve and enhance the managers of the park in relation to the activities of the park, and develop these new adventure packages, inside the natural parks”.

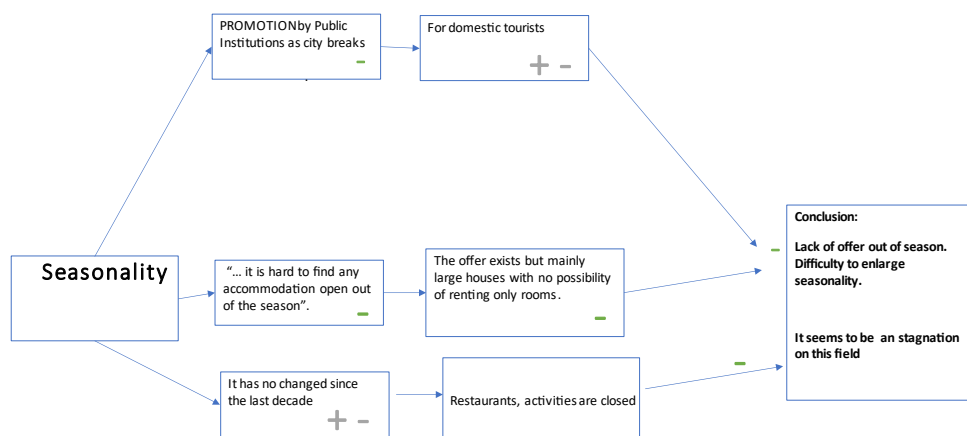
“Two years ago, they have started to Improve, enhance the managers of the natural park in relation with the activities held in the parks. This is very important. They do not believe in this!!”.

## (vi) SEASONALITY

Seasonality is strong in all the pilot areas studied. All pilot areas have enlarged their season. For all of them seasonality is a weakness, and affects the services provided and the employability of the staff.

Public bodies see it also as a problem, in terms of promotion, which is in turn what the private stakeholders are asking to them. They cannot promote certain areas since everything is closed. Thus, this affects the promotion and the strategy of diversification, which cannot take place. Thus both public and private stakeholders see the problems of sustainability but they give the responsibility to the other side.

Therefore, is difficult to enlarge the season or the length of the stay of tourists.



“The tendency is that an enlargement of it is needed”.



“During summer Spaniards and Italians are visiting the country”.

“New product to fight seasonality and open all year round, if possible. That way, the staff can be also maintained, and we will avoid the “accordion” issue of employees. We are willing to hire all our staff as many times as possible, and now we cannot”.

“We are suffering from a severe seasonality”.

“Services are closed; thus, the enlargement of the season is impossible. If you want to create new packages you cannot sale them”.

“More coordination is needed at regional level, at least to provide minimum services. Whit that the season can be enlarge and others can see the opportunity to work more months. Plus, will affect to professionals working more months, willing to stay in the area and in the companies as well, and more demand”.

As you can easily see, seasonality is not similar everywhere, but it is clear that exist in all pilot areas. Thus, fighting it needs different solutions in every destination.

“High season is from April to September”.

“High season from March to May, September to November”.

“Season is too short, mainly July and August”.

“To December to May is high season”.

“In summer months, is too hot to visit”.

“Strong seasonality in mountain areas”.

Another problem identified is the lack of accommodation, restaurants or other activities open out of the season. Then, what is first, lack of tourists or lack of available services?

“Irregular accommodation exists, mainly due to the migratory issues, since 2018. Connected with the lack of possibilities to work in rural areas”.

“A lot of campsites in the area, with cheap prices and low-profile tourists that mainly are staying during the weekend, and do not spent money in the area”.

“Mainly rural tourism, but same as per the camping’s. Tourists are not spending money in the area, or visiting, are only staying in the house over the weekends”.

“Second home houses are also a problem in the area”.

“Prices after the covid have been up, accommodation is too expensive for our clients”.

## (vii) EMPLOYABILITY

In terms of employability issues, two main problems have been identified: skills and salaries, especially in the areas where international tourism is not present or has less impact than domestic. Employees do not need certain language skills to perform their jobs, and when companies try to attract international tourists, cannot be due to the language barrier, mainly of the service providers, and sometimes of their staff.

Another issue identified in one of the pilot areas is related to the government policies in terms of unemployment. People have benefits for being unemployed, and to not lose these government funds, are not willing to accept a full or a part-time contract during the tourism season. This issue is also connected with the seasonality in certain areas, which is still strong and has not seen an enlargement of it, yet.

Regarding the skills of the employees, several comments have been arised.

“It is a problem, especially the language which is a barrier. Service providers do not speak other languages, but Italian. Luckily this is changing”.

“Technical approaches are also a problem”.

“But the most important challenge is the workers do not understand the importance of the Sustainability among their activities, as a long-term investment”.

“Which is, in turn related with seasonality.

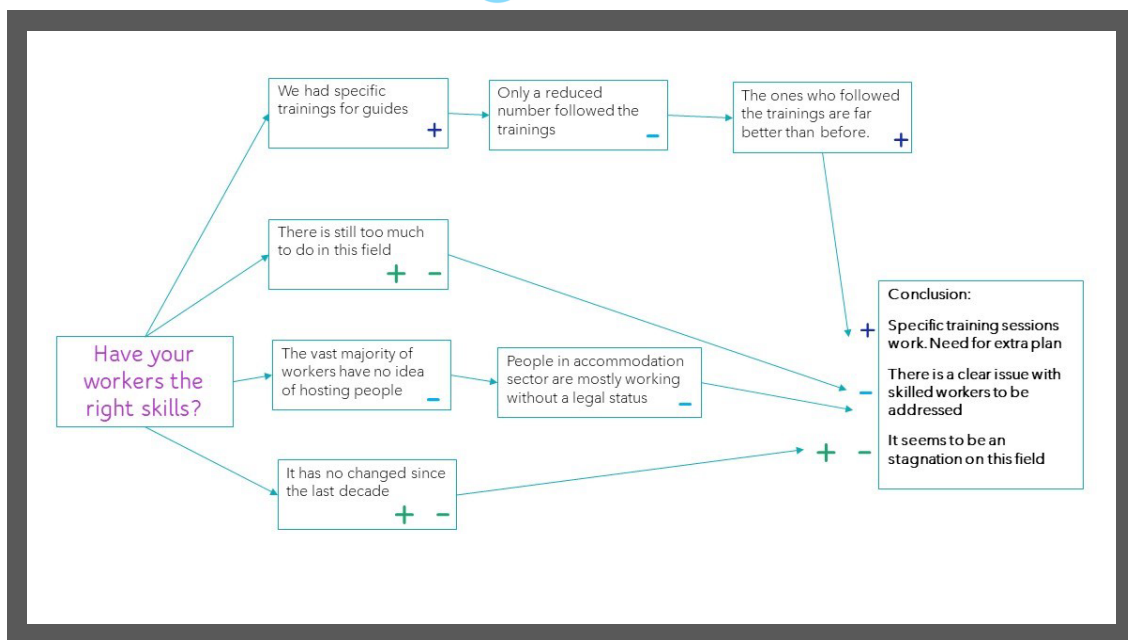
“More education is needed, on this regard, do pedagogy on the cultural and social aspects of the sustainability not only in the environmental side of it”.

“With education we are going to be able to change the MINDSET of the people”.

“Whereas on the other hand, entrepreneurs do have these skills and this mind set”.

“Company in need of very specific skills, not only soft skills to deal with tourist, but hard skills of a scientific and divers, plus foreign languages. The technical profile increases the difficulty to find good employees”.

“Passion is an item very difficult to find. Without passion, guides are not staying or not doing the job”.



“Staff do not have knowledge about tourism, plus there is a lack of people who are able to speak foreign languages”.

“Each year we must decrease our expectations in terms of staff. They do not have the technical skills, and do not speak English. Plus, there is no willingness to work during the weekends when tourists are coming”.

“Skills needed are concrete, soft skills for dealing with people, and hard skills related to nature, if you are guiding in the mountain you need to have certain knowledge about it”.

“Youngster from the region is not willing to work, and guides from other regions do not have the knowledge, and the patience to learn”.

“Lack of professionalization of the guides, and the stakeholders in inland regions”.

“Good level of technical skills in the sense of nature. Not interesting in gaining foreign languages skills, because they do not need it, since their target is national”.

“Difficulty to attract international demand”.

“Lack of professionalization”.

“It is difficult to find people with the right skills”.

“We always look for external people with expertise but sometimes they are not close to us, despite we search for proximity, it can be difficult to find people with the right skills”.





Salaries is one of the key aspects linked to employability. On one hand you have issues linked to its low level of salaries, and on the other hand you have the discontinuity throughout the year.

“Salaries of the employees are also a problem in the county, at national level. Without working you earn the same or more money than if you work”.

“Salaries and regulations of it at national level, affect seasonality as well. If you work more months, then you lose their subsidy, so this is also important when looking for employees, this issue makes it even more difficult and forces companies to closed at a certain time, without the possibility to enlarge the season.”

“Lack of opportunities for the local people to work. Migration crisis due to that fact”.

“Women are hired before men, if possible. Positive discrimination towards the female gender”.

“Increasing of salaries is important for this stakeholder. These past two years they have increased the salaries to avoid turn over, enlarge seasonality, and retain knowledge since the skills needed are very difficult to find”.

“Career plan including capacity building courses, material at cost price, and possibility to developed and create new products”.

“To retain employees, since the past two years our policy is to increase salaries, and the professional category, but still, is difficult to avoid the turnover, due to the skills, and the seasonality of our services”.

“Mainly female are working in these sectors, it is easier, and willing to learn, explore and create new things”.

“Salaries are poor. Is a sense of Education and Value the activities conducted outdoor, such as agricultural. Educate the perception of people, even the residents”.

## (viii) MARKETS

Despite the geographical differences among the pilot areas, after the interviews, common international markets have been identified in seven out of the thirteen pilot areas. International markets for the MEDUSA pilot areas are presented alphabetically.

The important data here is that, in almost all the areas, their main target market are domestic tourists.

Those signed with an \* are present in the several areas.



**Non-European countries:** Brazil, China\*, India, Japan, Russia\*, Switzerland, United States of America\*, United Kingdom

**European countries:** Belgium, France\*, Germany\*, Italy, Netherlands, Poland, Sweden, Spain.

See the responses in terms of origin markets as follow:

“After covid, international tourists are growing mainly from USA and RUSSIA”.

“3 years ago, China, Eastern Japan, Brazil, northern Europe, UK, France, Germany, Sweden, and Spain”.

“In April 2022, 200% more international tourist than 2019”.

“Country strategy of opening more flights connecting to Europe in 2022 to increase the figures of 2019”.

“Currently the Chinese and Russian market are still closed, so they want to attract more Europeans, routes mainly from Italy”.

“Poland, USA, India”.

“France, Belgium, Switzerland, domestic proximity, Germany”.

“Local tourism during winter, mainly during the weekends, but not in weekdays”.

“International tourists are more into sustainable practices than the locals, which take for granted everything, and they are not willing to pay for visiting the natural areas, they can do it on their own”.

“Main market is France”.

“Before the covid, they were opening the Russian, Netherlands, and German markets. But currently this tendency has decreased”.

“98% of our market is from Barcelona”.

“Mainly domestic, but due to seasonality”.

“Inland areas, mainly domestic”.

“During covid they value the area, but not after”.

“French market, mainly”.

“Southern Europe, (France, Italy, Spain) but mainly France, also China and Germany”.

Interviewees have also identified some changes in their demand, in comparison with the pre-pandemic times, and differences in their length of stay as well.

“There is an strategy to attract professionals from abroad with another project”.



“Sports are not very popular in our country”.

“Open to the French market, if possible”.

“Demand now is asking for more services. Before they were only visiting the natural areas, now are keen to demand more services there”.

“This changing demand was based on a changed of the origins of tourists or you have the same areas of incoming than before”.

“Changes of the mindset of clients itself. Nowadays, they want different services”.

“30% of the GDP of the country is in tourism”.

“Demand is changing, and adventure tourism is an opportunity”.

About the Length of the stay, some of the interviewees comments are listed bellow.

“On average 1 week, no more than 15 days. Rental prices have increase after the covid, tourist practicing this activity cannot afford the rentals”.

“Daily packages are the most sold, especially during winter”.

“More than 5 days package is very difficult to sale”.

“Average from 2 up to 5 days maximum, but mainly we sale day tours”.

“2-3 days. Weekends, and daily tours”.

“Packages of 4 days on average”.

DMCs and companies coincide in the fact that tailor-made packages are the best solution for them, and their customers as well, but it is very difficult for them to create these packages.

For international tourists, the length of the stay is longer, whereas domestics tourist stays for fewer days.

Americans are spending more days, 7 up to 10 on average and they spent more money than the rest of the nationalities, followed by countries from northern Europe.

High-income consumers, easy to find better service providers, not oriented to price, oriented to the uniqueness of the region. Adventure tourism and nature practices were important during the pandemic year, but now consumers went back to the old practices, and nothing has been learned or has been forgotten, this especially affects those areas which a higher dependence on domestic tourism, in certain is up to 98%. On the other hand, DMcs which operate not providing tailor-made packages for their customers are facing more problems than the others.

Some coincide in the tendency that after the pandemic, consumers are no longer scared to travel again.



For some, consumers are now looking for other activities, such as nature-based activities, slow, and ecotourism, and see it as an opportunity to create new products. In one region, there is not culture of adventure tourism within the county and see it as an opportunity to create this need in the country as well.

The creation of packages it is also complicated due to the stakeholders in the area, seasonality and, the lack of public transportation connecting the areas.

## (ix) PUBLIC TRANSPORTATION

One of the common problems of all the non-massive destinations is how to reach them. Public transport is insufficient or nonexistent, and for this reason, creating packages or products using public transport is not actually feasible at all.

“Attractions or spots are located a part, very far away from one to another. In the region there are 3 international airports.”

“Slow Tourism and Sustainable products like cycling tours exists, but due to the infrastructures it is not possible to cover the territory. If the tourists are willing to spend more time, then slow mobility is possible, buses are very difficult to travel with”.

“The country has increased double its population in 20 years’ time. Infrastructures have a lot of pressure”.

“Lack of infrastructures to create packages including public transportation. Plus, attractions are far away from the others”.

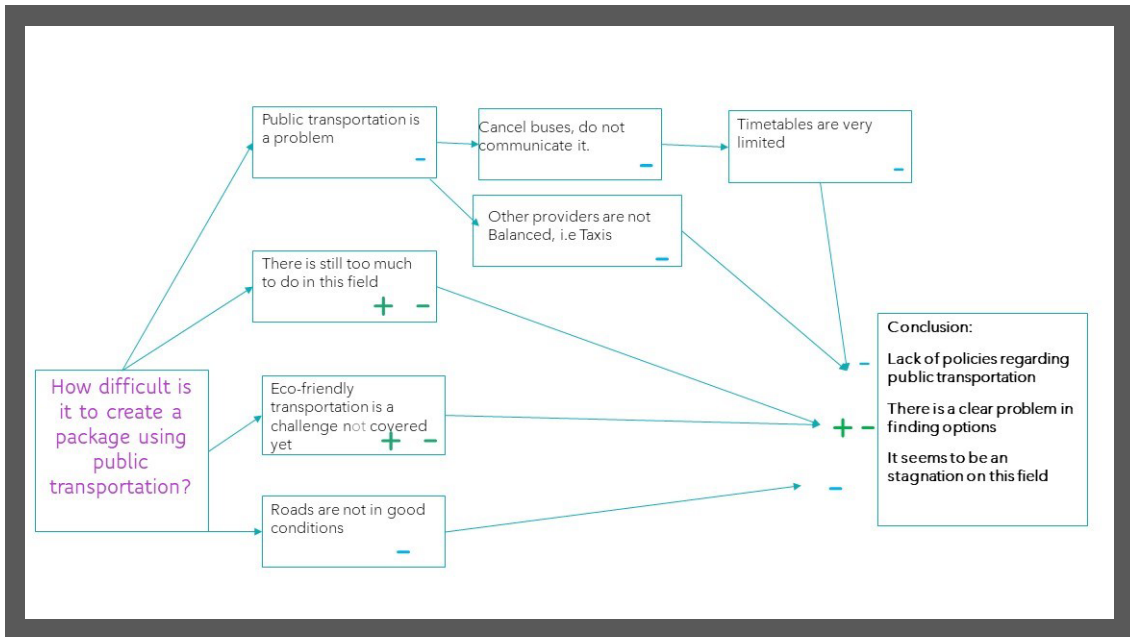
“Timetables usually do not fit/match the needs of our products”.

“The lack of public transportation is also a problem for locals, the historical quarters of the big villages are left aside, and this affects the inhabitants, which are leaving the centers, but also the tourist who are coming to visit specifically these areas as well, as part of the cultural heritage”.

“It is an open circle which never gets closed”.

“Lack of infrastructures is a key. Certain areas are creating programs for public transportation on demand. This requires organization, but the service is provided”-

“Lack of communication to inhabitants and service providers, which are not using the service. If the service is not used, will disappear. And the circle starts over again”.



“Private mobility is instead promoted but can be more responsible with electric cars. But there are not electric charges point in the area, or very few”.

“Good strategy creating the transport on demand, and prices are also affordable. Tourists do not know that this service exists, a communication campaign is needed in that sense. The more this service is used, the more the affluence of buses will be”.

“Quite inexistent in the area, is very complicated, plus the equipment needed to conduct the activity.”.

“It is a huge problem in the area. There is a lack of roads in the area”.

“One of our products is to visit and abandoned village, no public transportation to access the area exists, no one lives there.

In addition, precarity of public transport also generate difficulties putting in place other possible solutions to the issues raised beforehand. As example the connection of the different stakeholders, the creation of new products or the participation of workers in remote areas to training sessions.

“Training with locals is also very difficult. They cannot access the training due to the lack of public transportation, thus, trainings must be repeated at each area.





## (x) IMPACTS OF THE PROJECT

Finally, interviewees were very participative in naming the impacts that MEDUSA project had in their companies. After presenting the impacts, a category named Proposals for Improvement are highlighted.

An initial group of comments are linked to the possibilities for better connection with similar stakeholders of the same country and from other countries.

“Forced cooperation due to the legality, norms, regulations, and it is difficult”.

“On the other hand, great opportunities to meet other people, companies, regions with same similarities, problems, difficulties, but nothing else, the projects itself are not sustainable”.

“Has been a learning lessons, to get conscious about the Mediterranean regions, which are all of us, we should be united to united forces for the global dynamics of our world of tourism”.

“One positive thing was the possibility to meet other people from different countries, and the networking spaces created by the project”.

“Medusa is an opportunity to exchange with other participants, at international level, whereas in our county but also internationally but this did not take place”.

Some comments are in line with the management of the projects and how the interviewees believe in possible improvements.

“So many many resources used in these projects which are similar and disconnected”.

“Less actions, more durability of them, more tangible things. Monitorization of the projects after they have concluded”.

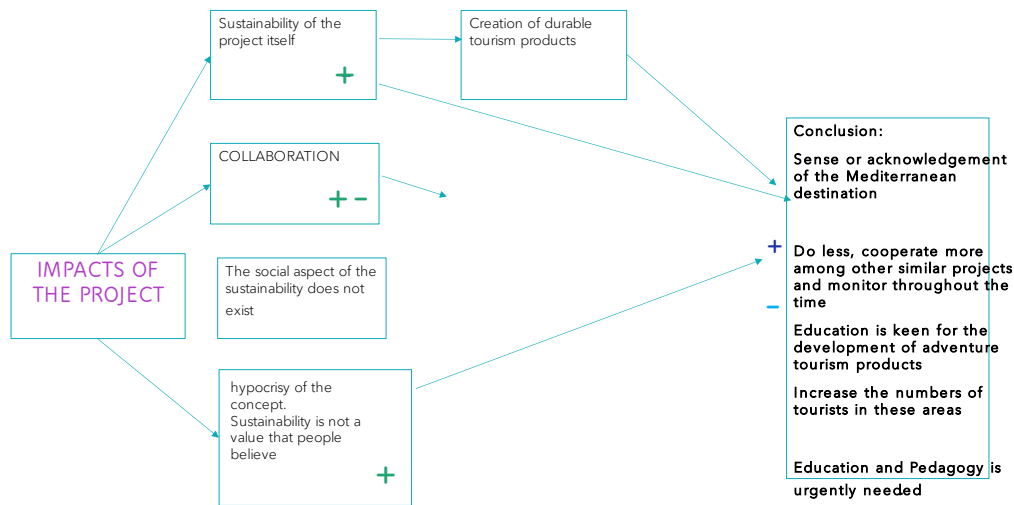
“Do less, keep more, and maintain more”.

It is also possible to understand the differences between countries and regions trough the project life.

“Governmental realities very different”.

“Members of the project oriented towards sustainability, and knowledgeable about the tourism field”.

“Most important to work with other regions, has been to acknowledge how similar we are and how we need to understand our differences through cooperation”.



Some comments were giving really value to the creation of products out of the project, and that the products developed were better thanks to the project than without.

“Thanks to the project, the number of Adventure tourism products have increase in the area”.

“New sea-oriented products and related to the culture of the region which is surrounded by natural areas”.

“The first impact for the region has been to focus on creating new tourism products, secondly, sustainable products, related with the adventure, outdoor activities”.

“Asia is growing a lot, and we are sharing the Mediterranean culture, meaning int the present, and in the future and this could be one of the big challenges of tourism. A Transformational experience, a mesh up of everything together”.

“Very important to create and develop new products, for us at least”.

“Another aspect is the possibility to create new tourism products. Outdoors activities related to the sea are lacking sometimes”.

“Thanks to the project they have created two new packages”.

Another big group is about the new opportunities revealed thanks to the MEDUSA project.

“In terms of policy making of the county, creating Adventure tourism products it is a good strategy to diversify the offer of the country, which is mainly cultural”.



“Medusa project evolves in the sense of identifying the bad and the good tourist”.

“To be sustainable, the only way to achieve it, is by distributing travelers thorough the region and in different periods of time”.

“The project also has brought the sense of the Mediterranean destination”.

“The project allowed our company to create a new job position that we are willing to maintain over the years”.

“It is better to get in Touch with other partner in a real project or creating knowledge without an existent framework, and without any relationship”.

“Impacts of the project – Creation of a sustainable agreement for the parks, with this agreement they must work together”.

Another group of comments was devoted to future continuity of the project far beyond the project life.

“In terms of commercialization was lacking, must be stronger”.

“The creation of adventure tourism product has added value to the regions, not only for the products itself, but also for the contacts gained”.

“Medusa had positive impacts in our company, but we expected more coordination”.

“Creating new collaborations with partners. To collaborate preparing proposals for other projects, etc.”.

“There is a sense of physicality of the stakeholders, it is very difficult to create partnership, and, therefore, difficult to create long packages”.

## (xi) PROPOSALS FOR IMPROVEMENT

Interviewees were very active providing proposals, this was in relation to the impacts of the project. There are several which are worth to mention.

This was very positive for the interviewers, so we include this question in the rest of the interviews, but data raised naturally by the participants. Therefore, this category is important for the evaluation.

Thus, some of the proposals made by the interviewees are listed below.

“Gathering data systematically from the stakeholders and share knowledge. Not only tourism data, but also from the environmental department of each region, and cross this information”.

## MEDUSA

“Creation of a board with public and private stakeholders for the public transportation, share knowledge about the needs of the users, regulars and from the tourism business”.

“Digitalization is something seen as a need for small stakeholders”.

“We need to believe in what we are doing, and precisely we need to believe in what we have, in our environment, which is important. Once we believe it, take care of it, then, many others will come”.

“After the project, the efforts to enlarge seasonality and deconcentrate fluency in certain natural areas”.

“Preservation of the natural areas through the tourism products. That requires collaboration and cooperation with all the services present in the natural areas”.

“Articulate the promotion of these areas based on the sustainability values, and market them in that sense”.

“Create a sustainable board to give the voice to stakeholders involve in the area, especially in natural areas to know their needs, and create a marketing strategy according to these needs”.

“Capacity building courses for guides in natural areas. Not only in terms of flora and fauna, but also to gain soft and hard skills to manage better the group of tourists”.

“Reinforce the power of DMCs, strengthen the relations with the rest of stakeholders to create quality and sustainable products”.

“All European projects have the same objectives, structure... it is important not duplicate the efforts, and put in common what others are doing at this level”.

“There is no continuity of the projects, no one monitors if the actions have been done or not, or if products will least or die right after the project conclusion”.

“Imply the sustainable values, also in these projects to really impact in the areas which have been part of them”.

“Select partners which are tourism oriented, and knowledgeable of tourist”.

“Sometimes, cooperation is forced in these projects, and should not be”.

“Capacity building courses are needed in certain areas but balanced and adapted to the different regions and levels of knowledge”.

“Not oriented to the results, but the enrichment of the areas, or the values gained during the projects. Thus, monitor these actions”.



“On-site meeting with the similar stakeholders within the pilot areas: i.e., guides of the same country but different regions, to transfer knowledge and benchmark procedures, etc.”.

“Benchmark with other companies. We need specific training for our areas”.

To sum up, the main concerns are about the possibility to continue working on this field, and if possible, through new projects, increasing participants and being more ambitious, trying to expand the acquired knowledge.

Enhance the cooperation not forcing the relationships between partners, but finding partners really interested in giving and not simply about taking.

Creating, exchanging, and monitoring data seems crucial for them. The problem is the need for expertise in obtaining and using this data properly.

Data shared with Med Pearls project

Since the methodology used in MEDUSA and MED PEARLS projects is exactly the same, some results can be shared. It was observed that despite the fact of tackling different segments, MEDUSA Adventure Tourism, and MED PEARLS Slow Tourism, the similar scenario made relevant the use of the same approach and the combination of results.

Both projects are working in the Mediterranean region, in pilot areas which are mainly remote and rural, and with similar segments linked to a non-massive approach, and more open to sustainability.

Therefore, conducting the interviews we could notice the different contact points between the two projects. Hereafter you can find the list of similar topics.

| <b>MEDUSA</b>                    | <b>MED PEARLS</b>             |
|----------------------------------|-------------------------------|
| <b>Covid 19 Pandemic effects</b> | Covid 19 Pandemic effects     |
| <b>Sustainability</b>            |                               |
| <b>Education</b>                 | Education                     |
| <b>Stakeholders</b>              | Stakeholders                  |
| <b>Collaboration</b>             |                               |
| <b>Seasonality</b>               | Seasonality                   |
| <b>Employability</b>             | Employability                 |
| <b>Markets</b>                   | Markets                       |
| <b>Accommodation</b>             | Accommodation                 |
| <b>Public Transportation</b>     | Public Transportation         |
| <b>Impacts of the project</b>    | Impacts of the Project        |
| <b>Proposals for improvement</b> |                               |
|                                  | Information - Tourism Offices |
|                                  | Promotion                     |
|                                  | Commercialization             |

Some similar approaches from MED PEARLS to add up in the MEDUSA list.

“The positive thing is that the Covid-19 pandemic has increased awareness regarding sustainability issues”.

“...that domestic tourists become better ambassadors of these areas because they got to know their own country”.

“Key, stakeholders in general and service providers are not educated about the slow tourism or sustainability in this area”.

“Lack of knowledge regarding sustainability and slow tourism among the collaborators”.

“Not tailor-made packages, and therefore is more difficult to attract international tourists.”

“Takes a lot of time for them to promote these new packages, and it is difficult to market them”.





“People not born in the region, but with a great passion are those who understand better and promote the area with sustainable and slow values because they believe in what they are doing, not only doing it. Or, the youngster who has studied and lived abroad and have come back to the area to highlight their roots, and are innovative”.

“Eco-friendly transportation is a challenge not covered yet.”

“Roads during winter are very difficult to be driven”.

“It is hard to find accommodation or stakeholders which are aligned with the slow tourism, and sustainable products, in the region. With Passion and love for the region, and companies based on the roots”.

Apart from the coincidences, there are some elements appeared clearly in the MED PEARLS research, that have been less mentioned by the MEDUSA interviewees, but that might be also applicable. You can see here the topics added.

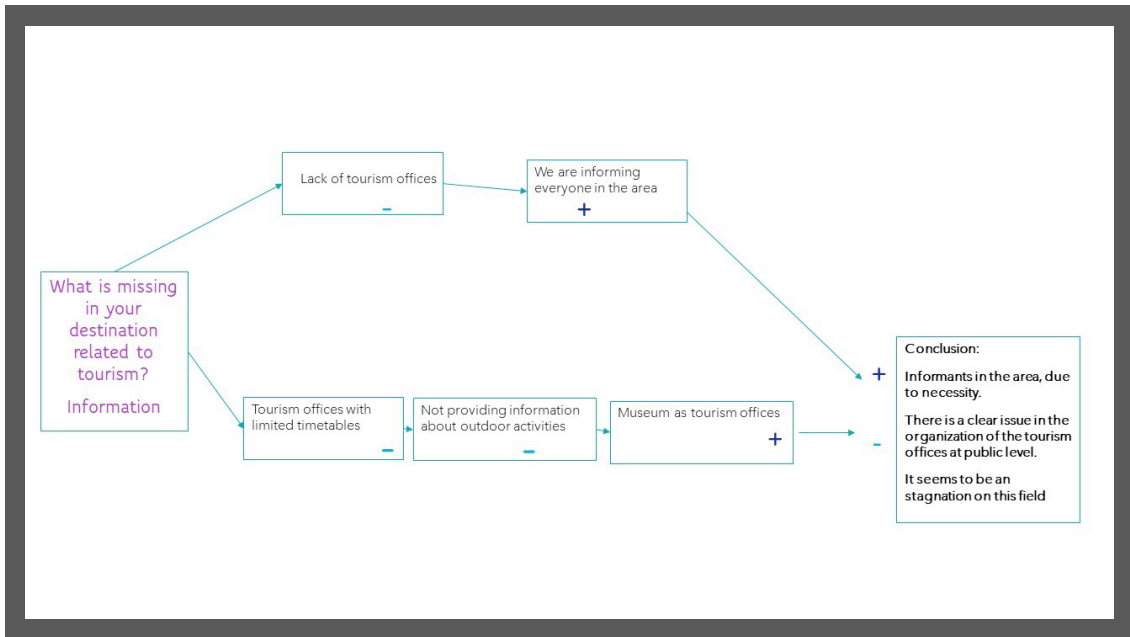
## Information – Tourism Offices

A lack of tourism information in the area has been identified by all the interviewees. Even if this was not a concrete question, nearly all the interviewees mentioned this issue as a main problem in the area.

In most of the pilot destinations there are no official information points, and if any, with limited open hours to welcome tourists and providing not much information about the available activities.

“Tourism offices have limited timetables”.

“...were not providing information about outdoor activities”.



Other public institutions were providing information when no information points were available, such as “Museums as tourism offices”. Again informality appears, and solutions arise spontaneously from certain stakeholders.

In other cases, Dmc’s or regular accommodation places were the informants but did not always provide all the information, according to some interviewees.

“Hotels were the informants, and no tourism offices in the area”.

“Municipalities and hotels were not providing information about outdoor activities”.

“Since there is the lack of a tourism office nearby, we have to inform everyone in the area about our activities, but this is tiring”.

## Promotion

All interviewees, including people working in public bodies, mention that promotion should be the main task of public institutions. All sorts of comments were raised in this regard. In general terms is clear for the pilot areas that promotion is very important and support from the government is needed, although there are strategies to promote sustainable tourism, still have not been implemented very strongly. Nothing has been done so far about promoting slow tourism.

“Public institutions are responsible to promote sustainable and slow tourism, and enhancing private companies, through resources”.



“Local governments have many initiatives that focus on this kind of goal to educate local businesses but there is still a long way to go.”

“Local institutions do not believe in slow tourism or sustainable values and do not support small companies which do. The same answers are in terms of governance, or collaboration between public and private.”

“Lack of public policies and regulations or norms towards sustainability in any of its dimensions social or cultural dimensions, and only a few projects in terms of the environmental perspective.”

“The government of the region will start to implement new regulations on slow mobility and slow tourism.”

“What is valuable is for tourists to experience the local culinary dishes. They don't understand that the value of doing that is what they need to promote”.

Decision-making is last minute, and difficult to plan, by travel agencies, and this has changed due to the pandemic times.

Consumers have returned to the previous behavior, pre-pandemic, booking one year in advance in certain areas. Nevertheless, lack of communication with the final consumers is a problem.

## Comercialization

A more general idea that appeared, is the fact that a common marketplace for all the pilot areas will be seen of interest. To sell slow products and reinforce the slow tourism brand image along the Mediterranean area.

It requires a big effort for private companies, to sell their packages, and even more to sell their regions. Again, public institutions should help to with promotion, and then support the marketplace.

“An association, will help to increase the pearl in the Mediterranean areas. To approach slow tourism. Capitalization is the main goal. With proper commercialization, sales can grow.”

“Capitalization is the main goal”.

## Expert panel

Since the proposed qualitative indicator system was a new and innovative solution, apart from having our own point of view from the Tourism research institute of the University of Girona (Insetur), we considered that was necessary to check the system with the opinion of a panel of experts.

For this particular purpose we decided to ask a wide range of experts worldwide, in an anonymous manner, their valuable opinion about the whole concept of the system, but also about the individual indicators developed. The main aim was to refine and fine tune the indicator system, avoiding superfluous issues, but specially not forgetting any relevant topic. Moreover, checking the general balance of the system was needed.

To achieve all these elements, we decided to build a list of experts that includes these four categories divided into two main groups.

- 1) Two lines of experts
  - a) Experts in indicators
  - b) Experts in Slow or less-developed destinations
- 2) Two Types of Experts
  - a) Academics
  - b) Non-Academics

The reasoning behind these categories is to cover the maximum range of relevant knowledge linked to the main topic. In this regard, having experts in indicators will assure a reliability level in terms of data results and relevance, and having experts in Slow tourism or less developed destinations will bring the focus to the reality we are trying to observe, and the right flexibility to adapt the system to these destinations. Furthermore, we wanted to have within the list of experts, on one hand members of the academia, to obtain the theoretical inputs and the last advancements in basic research, and on the other hand practitioners, to bring the practical knowledge of the information management systems to the indicators.

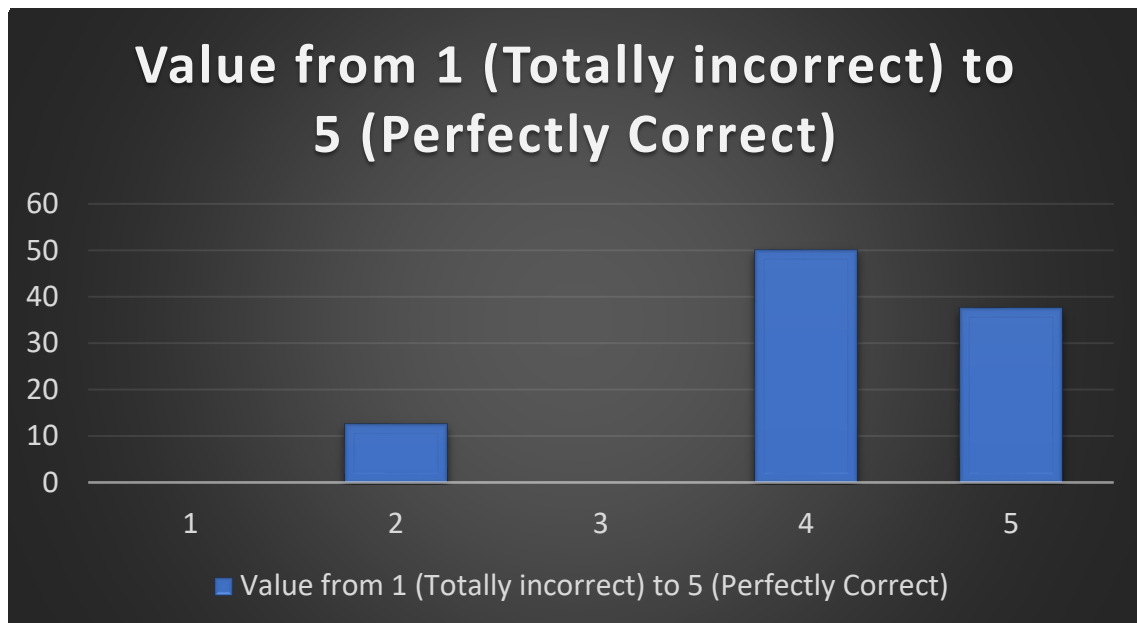
Based on these criteria, we contacted the following list of experts.

|                       |                        |                     |
|-----------------------|------------------------|---------------------|
| Consultant, India     | Researcher, Ethiopia   | Consultant, Croatia |
| Academic, Malaysia    | Academic, Kenia        | Academic, UK        |
| Academic, Mauritius   | Researcher, Kenia      | Consultant, Cyprus  |
| Researcher, Mauritius | Academic Mongolia      | Consultant, Italy   |
| Academic, Ghana       | Academic South Africa  | Academic, Italy     |
| Researcher, Ghana     | Data Manager, Spain    | Researcher, Italy   |
| Consultant, Ghana     | Data Consultant, Spain | Researcher, France  |
| Academic, Ethiopia    | Academic, Croatia      |                     |

To sum up we invited 23 experts, from those 12 experts on slow tourism and underdeveloped destinations and 11 experts on indicators. At the same time 10 experts from the academia, an 13 experts from the practitioners.

It is needed to say that the whole process was anonymous. We sent out 23 different requests to those experts, and we obtained 16 answers. The anonymous concept is relevant to guarantee the freedom of expression and opinion. The research must avoid the subjectivity or any kind of bias from the researcher’s point of view. So, this measure guarantees the needed objectivity.

We asked to the experts a personal evaluation of the whole system in general, and surprisingly nearly 90% of answers valued the system with a 4 or a 5 out of 5.



**What is missed?**

It was asked to the experts if they could find something missing in the proposal. The vast majority of experts answered with no further remarks or with neutral or positive comments. But there were small comments that we collect in here.

“The community-based side of the three broad areas. Key individuals in the community who have benefited or not from tourism will add/corroborate the sustainability issues. That is, a community lens.” (Expert Opinion 1)

“The approach will only aggregate views of destination managers and will fail to give the real and actual impact of tourism at the micro-destination level in each country. These people in most destinations would like to give a good impression because anything other than that will appear that they are not doing their work well. It is highly subjective approach. The questions are also generic. For instance, when you say previous seasons,



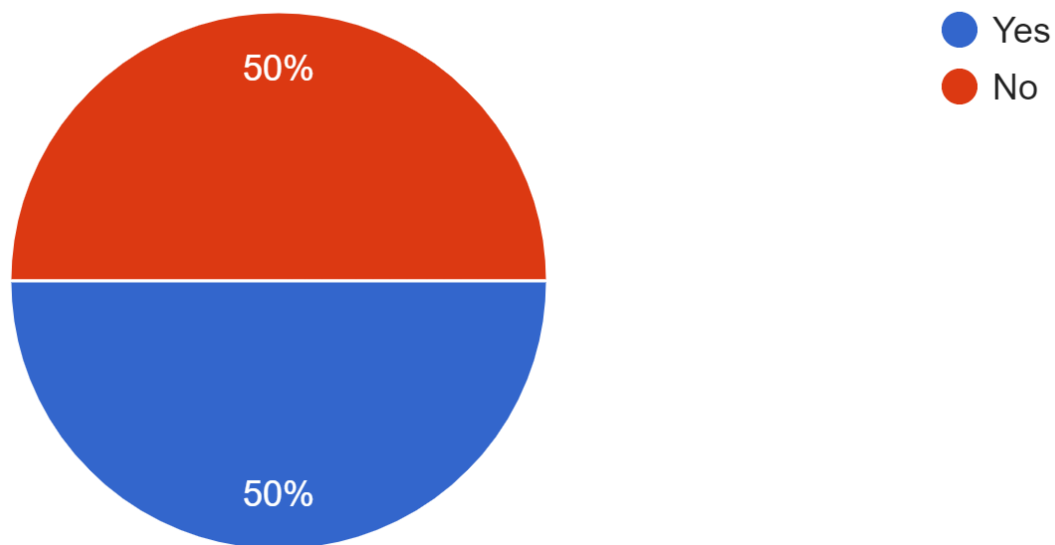
which exact season are you referring to? This will allow the respondent to choose the season which he/she likes the present and so comparison across destinations will be problematic.” (Expert Opinion 2)

Expert opinion 1, clearly mention the need to include the lens of the local community and civil society into the system. We totally agree on this, thus we included interviews to local associations and or local NGO’s while collecting data.

Expert opinion 2, show doubts about the sincerity of the respondents, specially due to their condition of business oriented. In this regard, we can assure that developing individual semi-structured interviews we observed totally the opposite situation, meaning that all the comments were really critical and sincere. In addition we included, as mentioned before, the opinion of local residents and NGO’s to have another perspective if needed.

Will you have another approach to obtain tourism trends in non-mature destinations?

The next question tried to obtain data about other alternatives to measure tourism data in a qualitative way. Half of the respondents mentioned that there exist some alternatives.



“Setting up satellite offices at the destination to obtain/support the collection of primary data in conjunction with the DMCs and DMOs”. (Expert opinion 4)

“Focus Group Discussion and Choice Experiment.” (Expert opinion 5)

“Consider carry capacity limits and other sustainability issues relating to tourist attractions at these destinations.” (Expert opinion 6)

“Content Analysis using Sharing informations from media social platform, this is useful if the research is for the tourist experience trends.” (Expert opinion 7)

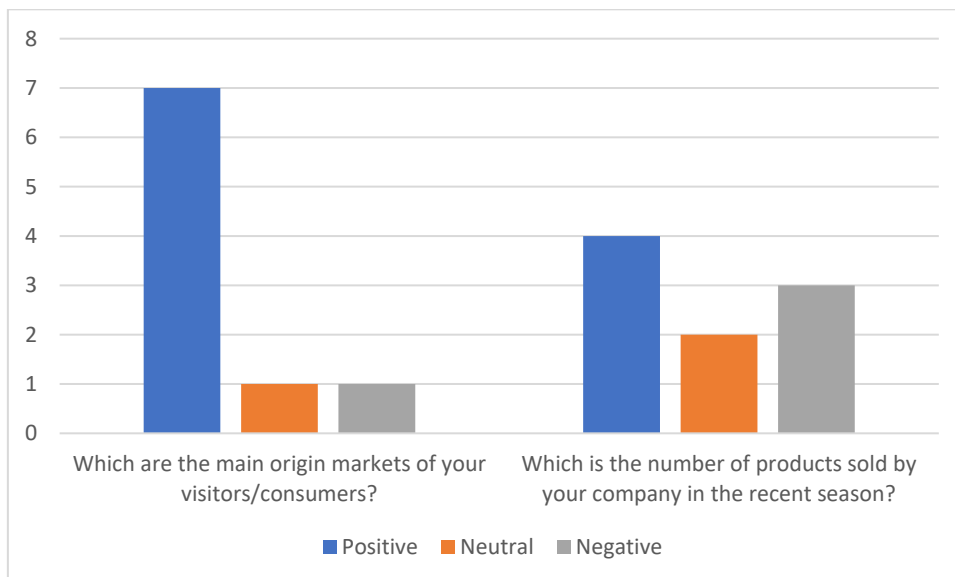


## **MEDUSA**

All the comments that are listed here, are really valuable, and explain possible alternative methods. Nevertheless we believe that they are more difficult to carry out. For instance, settling up satellite offices is ideal in terms of proximity and data gathering, but really difficult in terms of costs for these kind of destinations. Furthermore, focus groups can be really difficult to manage in destinations with a clear ierarchy, which will make less reliable the results. Finally, content analysis using information from social media is a good source of information about the consumers, but in places were internet connection is often a problem, the uploaded content will totally differ from what can be found in mass Tourism destinations. So at the end, less valuable information available.

How do you value the need of this particular indicator

We also asked the experts to value each one of the proposed indicators, and we obtained a positive winning answer in all of them. You can find in the following graph an exemple of this evaluation.



In the first part of the graph you can see an standard results with close to 70% of the answers valuing the indicator as positive, and in the second part of the graph you can observe a more controversial result, still positive, but with more critics. That is why we revised it in the final version.

## Summarizing results

Here you can find the relevant information obtained with the qualitative indicators test in a summary format. Different tables depending on each group of sustainability indicators are displayed.

### Economic sustainability

| Economic Indicators       | General Trend   | Comments  |
|---------------------------|---|---|
| <b>Origin markets</b>     | Russia has disappeared ≠<br>China Decreased ↓<br>Northern EU Increased ↑<br>North America Increased ↑ | The decrease is mainly due to the actual Russia – Ukraine war.                      |
| <b>Length of stay</b>     | Remained Similar ↔  |   |
| <b>Money spent</b>        | Remained Similar ↔  |   |
| <b>Accommodation</b>      | Remained Similar ↔  | There is a clear informal amount of accommodation in the south Mediterranean areas. |
| <b>Daily visits</b>       | Increased ↑   | Specially thanks to domestic tourists during and after the pandemic                 |
| <b>Number of products</b> | Increased ↑   | Thanks to the project   |
| <b>Price of packages</b>  | Small increase ↑  |   |
| <b>Number of sales</b>    | Remained Similar ↔  | Better than during the covid pandemic but still similar than before.                |

## Social sustainability

| Social Indicators                  | General Trend         | Comments   |
|------------------------------------|-----------------------|--|
| <b>Covering positions</b>          | Decreased ↓           | It is more difficult to find people                          |
| <b>Salaries</b>                    | Remained Similar ↔    | Only in the North Mediterranean areas had a minimum increase |
| <b>Skills</b>                      | Decreased ↓           | The tourists want more, the employees have less skills       |
| <b>Education Level</b>             | Remained Similar ↔    |  |
| <b>Permanent contract</b>          | Remained Similar ↔    |  |
| <b>Full-time vs part-time work</b> | Part-time increased ↑ |  |
| <b>Stakeholders</b>                | Increased ↑           | Specially international stakeholders thanks to the project   |

## Environmental sustainability

| Environmental Indicators        | General Trend                                       | Comments  |
|---------------------------------|---|---|
| <b>Protected Areas</b>          | Remained Similar ↔                                  | There is a huge difference in what protected areas mean in the different pilot areas                  |
| <b>Protection plan</b>          | Increasing ↑  | More plans under development  |
| <b>Seasonality</b>              | Remained Similar ↔                                  |   |
| <b>Public transportation</b>    | Decreased ↓   | It is impossible for all the pilot areas. Or no public transport is available or is clearly deficient |
| <b>Number of municipalities</b> | Remained Similar ↔                                  | Products are based in concrete areas  |
| <b>Routes</b>                   | Increased ↑   | More routes are available also thanks to the project  |
| <b>Stakeholders' activity</b>   | Public<br>Remained Similar ↔<br>Private Increased ↑ |   |

## Tourism Indicators' application Guidelines for less known destinations

The aim of this document is to explain in a detailed manner how destinations can collect certain data without huge infrastructures of difficult methods that are cost and time consuming.

The need and the benefits of using data in tourism destinations management and planning is out of discussion. Academics and practitioners coincide with the usefulness of taking decisions based on real data, and if possible, with a sequence of data along different periods of time. Understanding trends can help destinations to also forecast future scenarios and getting prepared for them thanks to previous data and experiences.

Nevertheless, the most common systems of indicators already tested are a direct consequence of business or environmental sets, that are based in constant monitoring of different realities. This scheme has also been adopted for tourism destinations with great results. Despite this success we realized that these standard and constant monitoring systems in tourism, can mostly be applied to mass tourism destinations, not only because of their costs, but also because they need a big number of stakeholders and tourists to generate enough data to be considered valuable.

In addition, the indicator systems movement started in Western societies, which also were the ones leading the worldwide tourism arrivals, as a need to improve their management and planning decisions related to tourism. Obviously, these countries, focused on their realities and created indicators that might help them improving their tourism performance. So, countries without the same possibilities and characteristics were left aside or pushed to use systems not adapted to them.

Thus, to collect and analyze tourism data from different countries and different kind of destinations, it is important to develop indicators that are adapted to the different tourism existing realities. Current standard indicators, like the European Tourism Indicators System (ETIS) present a Western approach that very often does not correlate with the reality of non-Western countries. Moreover, the actual systems of indicators are thought for countries that have well-developed statistical systems, and destinations with mass tourism activity where data can be more easily obtained. In contraposition, less known tourism destinations that do not have high volumes of tourism and countries without permanent and extensive data-archives cannot benefit from the standard indicator's systems.

Finally, data calculation and process is mainly based on quantitative data, which means that destinations with a reduced number of tourists, like slow tourism destinations, have additional sampling problems. In addition, experience shows that most of the emergent and non-mature destinations don't have the resources needed for data gathering and to keep data systems. That is why we propose to test new ways of obtaining data, and reliable systems for such destinations and in such circumstances.

After further evaluation of all ETIS indicators, we conclude that it is necessary to design a new system of indicators that focus on current tendencies observed in the destinations regarding key tourism aspects, and on identifying their intensities in terms of growth, stagnation or decline, and on which future predictions and decisions can be made by destination managers. In this regard, we strongly believe that qualitative indicators will measure better these trends than quantitative ones, especially because with a reduced number of answers of key participants a higher degree of information can be obtained, and also of higher value.

Our goal then was the structuration and development of a new qualitative indicator scheme to facilitate data-driven decisions and improve tourism strategies for less-developed destinations and those that do not have a Western approach tradition to tourism data gathering and analysis.

And the present document wants to serve as a guide for these kinds of destinations to collect, manage, and interpret tourism data.



## Step 1: What do you want to know?

The first thing you need to decide as destination, is choosing which information will be relevant and useful for you. Regarding tourism destinations, the common framework accepted is based on the sustainability concept. This mean measuring economic performance, social development, and environmental situation of the area in which tourists are consuming tourism activities and experiences.

To gather all this data, the following table will include a collection of qualitative indicators divided into these three main groups.



## Economic Sustainability

- Which are the main origin markets of your visitors/consumers?
- How much longer are they staying this last season compared to the previous seasons?
- How much more (or less) are they spending compared with previous tourists in past seasons?
- Are there more accommodation options than in the previous years?
- % of daily visitors vs tourists, as perceived by the respondent?
- Which is the number of products sold by your company in the recent season? Has it increased, decreased, or remained similar as in the previous seasons?

### Specific questions for Destination Management Companies (DMC's)

- Average of daily cost / price for a package.
- Number of packages sold last period. Has it increased, decreased, or remained similar as in the previous period?

## Social Sustainability

- How easy (or difficult) is to find people to cover job positions in Tourism and Hospitality in the destination?
- Did the salaries of your employees increase, decrease, or remain similar as the previous period?
- Have your workers (or workers of the tourism sector) the right skills for their position?
- Which average level of education do the employees working in tourism have.
- How many employees has a permanent contract. Has it increased, decreased, or remained similar as in the previous seasons?
- What is the total number of employees (full-time/ part time). Has it increased, decreased, or remained similar as in the previous seasons?

### Specific questions for DMC's

- What is the number of actors you have to collaborate with for your products to be ready for the market (suppliers, etc). Has it increased, decreased, or remained similar as in the previous seasons?

## Environmental Sustainability

- Total number of hectares considered protected areas, natural parks, in the destination
- Is there any protection plan or policy regarding the natural or cultural spaces in the destination?
- Which are the months your business is open to visitors? Has it increased, decreased, or remained similar as in the previous seasons?
- How difficult is it to create tourism packages using public transportation?
- Number of towns/ municipalities included in your tourism packages. Has it increased, decreased, or remained similar?



- Number of tourism routes commercialized by local DMC's (cycling, hiking, gastronomic, cultural...). Has it increased, decreased, or remained similar?
- Who are the more and the less active stakeholders in your area?
- What is it missing in your destination related to tourism? (Information, infrastructures, promotion, ...)

Now that you could see the possible indicators, if you want to obtain data about another topic which is of particular interest for your destination, this can be easily included. Check the part of "How can you obtain data?" to understand how you will collect this distinct indicator for your destination. You can also equally delete or change the indicators that can't be applied to your destinations.

As a reference to add, eliminate or change indicators, you need to clearly identify which knowledge the original indicator brings, what do you want to know instead, and write the indicator in a way that can be evaluated afterwards.

See as example:

Indicator: Have your workers (or workers of the tourism sector) special skills for their position?

This indicator helps us know if the workers in the tourism sector need to improve certain skills to have a better performance of the tourism businesses.

You prefer to know if the training of your mountain and adventure guides brought to your destination better skilled workers. So, you can rephrase the indicator accordingly:

New Indicator: Have your tourism mountain guides the needed skills for their position?

And decide if you want to keep the old and the new, or only the new.

You need to be aware that indicators always bring more information if they have continuity in different periods, so it is important not to change all the indicators every time you collect data in order to maintain this consistency.

## Step 2: Which is your goal? or what do you want to finally obtain?

This second step is obviously linked to the previous one. You first decide which information is interesting for your destination, and depending on your position, or strategy, or reality you choose a goal that you want to obtain.

Which is your goal can differ depending on the kind of stakeholder you are. For instance, the goal of a Destination Management Organization (DMO), a public tourism board or a local development agency can be to measure the evolution of different strategies previously implemented or to implement. For instance, if you have a clear lack of public transport and you want to implement new measures to change it, you can see if the



perception of the other stakeholders is changing together with the plan. Another example can be defined by a particular DMC or an Incoming travel agency, wanting to open a new market origin, and observe if this market grows for yourself, but also for the whole destination, increasing your impact at the destination.

In any case your goal needs to accomplish three characteristics.

1. Clear
2. Measurable
3. Assessable

Clear means that the defined goal cannot generate different interpretations. This clarity assures that a shared vision of the goal is real.

Measurable means that its degree of change can be clearly and objectively observed, and also that it can be compared with previous or future periods.

Assessable means that the goal can be evaluated and finally decide if the goal has been accomplished or not as it was planned.

See as example:

If you want to train the tourism and hospitality workers, the goal you define as DMO of this destination might be “decrease from difficult to normal the easiness perception of finding skilled people for the sector in two years’ time”

This goal does not have different interpretations, using the first qualitative social indicator can be measured, and can also be assessed after the two years margin. Thus, after two years you can see if you accomplished or not your goal.

Moreover, if you are clearly ambitious as stakeholder or as destination you can define multiple goals, and even you can divide them into short-term, mid-term or long-term goals. The right amount and how ambitious they can be, depends only on the feasibility level. It is worthless to define several goals if you know that you will not be able to achieve them for sure. Being realistic is a must.

### Step 3: How can you obtain data?

The first thing that needs to be said is that you can decide in which periods you want to collect data. Do you want to collect data once a year, four times a year, one time in peak season and another in low season, or any other option that you might consider. More times mean more resources to be used, and more difficult to find people to answer you.

The second thing needed is, when you need to gather the data. It is strongly recommended to use periods in which tourism activity is not extremely peak, because the use of tourism stakeholders is essential, and they will be more eager to answer in periods with low pressure.



The data that can be used has mainly two ways of obtaining it. The first one is use data from other existing sources. Normally public bodies have public or open data that can be used. This means Municipalities, Regional governments, National governments and ministries, or international bodies like United Nations World Tourism Organization (UNWTO), World Travel and Tourism Council (WTTC), The Union for the Mediterranean, Eurostat, among others. The main problem with these sources of data is that they are having standard data and non-representative data of your destination. For instance, The total number of tourists arrivals by plane to your country. This is a perfect data at a national level, but useless if you are a remote destination in a mountain area.

Thus, for Quantitative Information obtained outside the destination level, you can only use it when it has sense as a proxy. As example, 90% of the tourism arrivals in your country have as main motivation sun and beach. Then you can approach than the other 10% has other motivations that might fit with your destination.

The second, but main way of obtaining data in non-mass or less known destinations can be using direct and Qualitative data. The method we strongly recommend is the collection of data interviewing relevant stakeholders. Individual interviews will work better because the interviewees will not be influenced by other's perceptions.

If you want to obtain Qualitative data from interviews, what do you need to do?

1. **Decide who will be in charge of collecting the data.** We encourage to have 1-2 people linked to the tourism activity. If possible, we recommend public bodies to take the lead, but it is not compulsory. For example, an association of private stakeholders or an NGO can be also candidates. It is better to avoid single stakeholders that have clear interests in obtaining concrete results.



\* If possible, the interviewees should have a neutral opinion about the persons appointed to conduct the interviews.

2. **Define a list of possible people to interview.** The list must be exhaustive and include the maximum number of stakeholders involved in the tourism activity of the destination. Meaning private companies, public bodies, NGO's or local residents representatives. Special attention is needed for DMC's and incoming travel agencies, and technical staff from the public bodies.



\* It is better to avoid political representatives. We are interested in obtaining the perception of people working in the terrain, not politically.

3. **Choose among the list who to interview.** Initially it is important to choose the widest range of different stakeholders as possible. As example 1 from the DMO, 1 from a DMC, 1 from the accommodation sector, 1 from the guiding companies, 1 from an NGO. This can be the starting point, but then you can include more interviewees from certain sectors because these sectors are more relevant for your destination. Then, the example will include 2 more DMC's and 3 more accommodation establishments.





4. **Decide how many people interview.** Previous studies says that in small destinations between 7 and 15 interviews is normally enough. The amount of people to interview depends on two things. First, the initial list of who to interview previously defined (Point 3). Secondly, you continue doing interviews until you barely find new information with new interviews. If the information is simply repeating, you need to stop.

\* Interviews must not last more than 1h. Spending more time will affect in obtaining reliable information.

5. **Prepare the conversation with the interviewees.** It is really important to prepare in advance to not get stuck in the middle of the presentation.

- Instead of a list of questions, you need to prepare the list of topics that you need to launch to get your questions answered. Never send the questions in advance, this might eliminate the reliability of the answers.
- Book in advance the time and place for the interview. The interview should happen without interruptions. It doesn't matter if it is online or face to face.
- Start the conversation introducing you and the study, and with a question easy to answer to break the ice and gain trust. Asking the interviewee about its expertise usually works.
- If possible, record the interview to revise it afterwards, or take detailed notes.
- Be prepared to explore topics that will appear in the conversation that were not in your list of topics. This might indicate a topic of interest to be analyzed in the future.

6. **Do a pilot test**, to check if the information you want to obtain is clearly understood and find out things missing, not relevant, or sensitive elements that need to be rethought.
7. **Conduct** the interviews. This need to be done in the shorter period possible. We need to understand that perceptions may vary depending on external factors, and we need to minimize them. The only way is conducting the interviews as closer in time as possible.
8. **Extract all the answers** from the interviews and transfer them into a document grouping them by topic or indicator.
9. **Find out the gaps**, if any, and contact again the person that was interviewed to eliminate the maximum number of gaps.
10. If possible, **contrast the initial findings** of your interviews with somebody not participating in the study but understanding your destination and tourism reality.

Following this decalogue step by step, you will be able to collect all the needed data to fill in your indicators and answer your goals.

## Step 4: How to interpret the data obtained

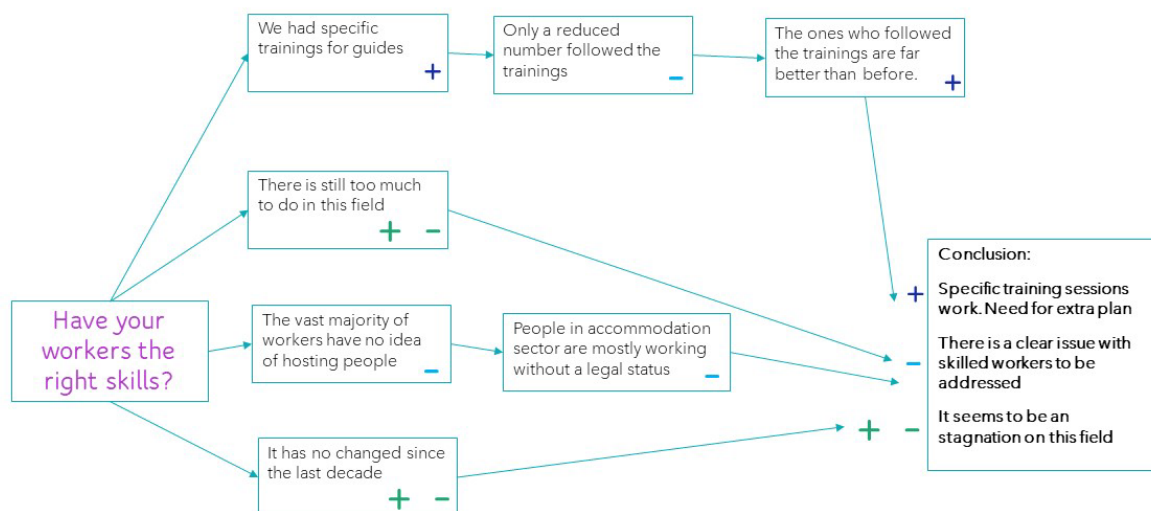
The final step when you have the information collected is to use it. To do so, there is always the need to interpret it. Data has no political color, neither a clear intention or a



delimited intention. So how we interpret the data will generate an intention or a bias if we interpret it in a conditioned manner.

In order to minimize the possible gaps generated, we encourage you to follow this simple steps.

1. Extract from the interviews the relevant data of a certain indicator. Extract exact phrases representing the real comment about the indicator from the interviewee.
2. Value each comment in a simple scale. As example, divide the sentences into Positive, Negative, and Neutral sentences.
3. Then you can build a conceptual map as you can see in the following example.



4. Finally draw the conclusions using the interviewees sentences to summarize what the indicator turns out.

Finally, the same thing can be done easily observing the trend that your interviews highlighted.

## Other existing data

Once the data is collected and interpreted, another step to be considered is to see if other kind of data exist from different sources. This secondary data can be of interest in contrasting or supporting the findings from our qualitative system. Data about general population or about general economic performance, or about general social aspects, can be used as a proxy to complete or support the tourism data obtained by your destination.



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## Contact

Dr. Lluís Prats

Chair of the Tourism Research Institute

University of Girona

## Address

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Plaça Ferrater i Mora, 1 Campus Barri Vell

E-17004 Girona

## E-mail

[Lluís.prats@udg.edu](mailto:Lluís.prats@udg.edu)

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