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Original scientific paper

NEOLOCALISM IN PRODUCT NAMES OF CZECH MICROBREWERIES: ANALYSIS OF PRINCIPLES AND TRENDS

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Abstract

The paper focuses on the analysis of the influence of neo-localism in the names of Czech microbreweries' products. Neolocalism is a phenomenon that, in the field of brand identity and marketing, is manifested in the orientation to local elements, cultural references and linguistic specificity. In an era of departure from the paradigm of globalization and strengthening of local markets, neolocalism plays a significant part in creative branding strategies. The aim of this paper is to verify whether the principles of neolocalism, demonstrated to be applied in the names of breweries themselves (Březinová, Linhartová, 2023), are also applied in the naming of individual products. Given the growing importance of microbreweries in regional development and tourism, the analysis of beer names becomes a relevant tool for understanding the marketing and cultural strategies of these producers. The study is based on the analysis of data collected in a research survey in 2024, which included more than 1,231 beer names from 250 microbreweries across the Czech Republic. The study uses content analysis complemented by linguistic and cultural interpretation. The key results show that 94% of the products assessed bear nominal or visual signs of local identity and cultural influences, including references to local geography, history, language and culture. Neolocalism thus represents a significant trend not only in the names of microbreweries but also in the names of their beer lines.

Keywords: Beer name, Geographical references, Historical motifs, Cultural and folklore motifs, Language elements (dialect, archaisms), References to local personalities

INTRODUCTION AND THEORETICAL BACKGROUND

In the last fifteen years, the Czech Republic has seen a significant increase in the number of microbreweries, which have become not only an interesting element of beer culture, but also an important factor in regional development (Hána, Materna, & Hasman 2022). Along with this trend, the strategy of branding and naming their products is also developing; this plays a key role in branding and marketing communication. Microbreweries, which have established themselves as a strong segment of the Czech brewing industry after 2010, use culturally specific elements and linguistic forms to strengthen their identity. A study (Březinová, & Linhartová, 2023) found that 64% of Czech microbrewery names contain elements of neolocalism, such as references to local geography, history, slang or cultural figures.

The presented research and aim of this paper is to verify whether the principles of neolocalism are applied in the naming of individual products of microbrewery.

Neolocalism, defined as the deliberate reference to local history, culture and geography, is emerging as an important phenomenon in this field (Kincl et al., 2022; Eberts, 2014; Holtkamp et al, 2016). Shortridge (1996) defines neo-localism as a socio-cultural phenomenon that refers to a renewed emphasis on local values, community identity and cultural heritage in response to globalisation pressures, thus emphasising the importance of local identity, communal solidarity and ecological sustainability. Based on this initial definition of neolocalism, Shortridge is considered the founder of neolocalism. However, in his 1996 study Keeping tabs on Kansas: Reflections on regionally based field study, published in the Journal of Cultural Geography, he had not yet formulated the principles of neolocalism. These were at least partially formulated by William Flack (1997) in his study American Microbreweries and Neolocalism: "Ale-ing" for a Sense of Place, where Flack applies Shortridge's concept to a specific practice (microbreweries) and elaborates on how neolocalism manifests itself (company name, local ingredients, symbols of place, community involvement). In Flack's work, we can already see the foundations of the principles of neolocalism, which are: the use of local resources, emphasizing a sense of place, and marketing through localism. These principles were further developed by Cavaliere, Ingram, and Slocum (2020) in their monograph Neolocalism and Tourism: Understanding a Global Movement, which synthesises and systematises the principles of neolocalism. The authors describe them as a conscious orientation toward place, strengthening community identity, sustainability, and the involvement of local actors. Talmage et al. (2020) defined the principles of neolocalism based on the name, location, and storytelling of breweries.

The importance of using neo-localism principles in product labeling is mainly due to the growing demand for authentic and locally sourced products (Mathews, & Patton, 2016; Cipollaro et al., 2021). In the area of product naming, there is a drive to create names that evoke a specific place, community or story, thereby promoting authenticity and brand credibility (Xu et al., 2024; Hartikainen, 2025;). This trend is particularly evident in the food and beverage sector (Eberts, 2014). Local products are perceived as higher quality, more proper and culturally richer (Riefler, 2020; Bryła, 2021; Fernández-Ferrín, 2020). Neolocalism in the food and beverage industry is associated with an upscale clientele and gentrification (Buratti, 2019).
The beers from microbreweries, often produced in limited editions and distributed in the region, meet these requirements. The name of the beer thus becomes an essential tool for building product identity and a key to establishing an emotional relationship with the consumer, further

helping to differentiate microbrewery products from multinational brands and appealing to consumers seeking an authentic experience (Oba, Howe, & Fitzsimons 2025).

In brand marketing, the principles of neo-localism are manifested through an emphasis on cultural references in communication, the use of local symbols, language specificity and visual identity (Ikäheimo, 2021). In the case of beer as a culturally symbolic product, this approach is particularly relevant.

Approaches to neo-localism in marketing are often based on concepts such as place branding, place attachment and cultural capital. Microbreweries become not only producers of beer but also carriers of the cultural identity of the region. Neolocalism in product names can be implemented through lexical structures (e.g. slang, dialect), cultural references (e.g. historical figures, events) or geographical terms (names of places, rivers, mountains, etc.) (Chamizo, Pérez-Caballero, & Rodríguez de Mier, 2024).

Neo-localism is strongly connected with microbrewing, as microbreweries emerge in response to the need for local production with added cultural value. As Schnell and Reese (2014) state, the names of beers and breweries carry key features of the cultural landscape and serve as a means of communication between the producer and the community.

In the Czech Republic, with its rich beer tradition and diverse regional identity, neo-localism is a natural part of microbrewery branding. It is therefore appropriate to examine how neo-localism manifests itself not only in the naming of microbreweries themselves, but also in the naming of their products. This article examines how the principles of neolocalism are reflected in the names of microbrewery products, which are the main carriers of the identity of the brewery in question. We draw on extensive research that analyses beer names and categorises them based on the presence of neolocalistic elements. The paper presents a systematic typology of these names, discusses their function and impact on consumer perceptions, and contributes to a broader understanding of the role of neo-localism in contemporary food and beverage marketing.

DATA AND METHODS

The research focused on analysis of beer names. Data was obtained from publicly available databases in 2024 and supplemented by content analysis of microbrewery websites and field research. A total of 1,231 beer names from 250 microbreweries were analysed. Each name was analyzed for the presence of elements of neolocalism, which were then categorized according to predefined criteria. The qualitative analysis focused on the following criteria identified in the names of individual beers: geographical references, historical motifs, linguistic elements, cultural associations, folklore motifs, and names based on personalities. Furthermore, content analysis was used to monitor the use of the brewery's name and logo on beer labels. Content analysis was carried out on the breweries' websites and traceable data on the labels of individual beer of breweries using contingency tables. The following segmentation criteria were also used: year of establishment of the brewery (since 2010, there has been a significant increase in the number of microbreweries, so the following groups were established: first group microbrewery founded before 2000, second 2001 to 2005, three 2006 to 2010, and then each year individually (2011/2012/2013, etc.), type of microbrewery (with taproom MR and without taproom MP) and regions of the Czech Republic where the brewery is located (D1 to D14: D1 Prague, D2 Central Bohemia Region, D3 South Bohemia Region, D4 South Moravia Region, etc.), and their influence on the selection of beer names from Czech microbreweries was examined.

The quantitative analysis of selected variables' influence on a beer's name has been conducted via regression analysis of panel data. The stationarity of variables plays an important role while working with panel data, as they are a combination of both time and cross-sectional dimensions. All of the variables (year of establishment, district, existence of the pub) have to be relatively stable around the mean value and time dispersion, otherwise estimation of the regression model, in the sense of a seeming regression, might be distorted. The testing is carried out via Dieckey Fuller's test of unit root (ADF test). In the next step, specific estimation techniques are chosen. It is necessary to take into account the character of the econometric model, the optimal character of provided estimates, the purpose of the estimated model, the difficulty of the method used both on quality and quantity of data and its robustness, but also the accessibility of adequate software and time and cost difficulty of the calculations.

Based on the estimated parameters of the econometric model, meaning both estimates of regression coefficients and estimates of stochastic parameters of the random parts‘ distribution, as well as observed values of the explanatory variables, the theoretical values of the variables are determined.

This leads to the solution of the econometric model (Baltagi, 2008). The most famous estimation procedure for determining numerical values of parameters of a single-equation linear regression model out of one selected observation of all its determinable parameters is the method of least squares.

Considering the specific nature of the data, there was a need to use tools which are compatible specifically with the mentioned data type. Estimation of panel data can be carried out in three ways: using pooled regression model (Pooled Regression), a model with fixed effects (Fixed Effects Model) or model with random effects (Random Effects Model) (Greene, 2003).

Pooled regression model is also labelled as comprehensive model, and its equation is as follows (for one explaining variable):

$$Y_{it} = \alpha + \beta X_{it} + \epsilon_{it} \qquad (1)$$

It is a standard regression model, where Yit is the explained variable, Xit is explaining variable and letters α, β mark coefficients, or rather parameters of the model. The letter ϵit marks a random part. Judging from the names, it can be expected that the explaining variable is going to explain (affect) the dependent variable and coefficient β is going to determine the effect of variable X on Y. This comprehensive model is not suited for most panel data (Baltagi, 2008).

The fixed effects model is used for modelling individual effects of an artificial variable. While this regression has a wide variety of explaining variables, it is still a regression model. For this reason, all information about regression models and the aforementioned regression equation also apply here.

$$Y_{it} = \alpha_N D_{it}^{(N)} + \beta X_{it} + \epsilon_{it} \qquad (2)$$

As opposed to the previous model, this one assumes a variety (year of establishment, district, existence of the pub) of cross-sectional units in absolute numbers, hence the need to create N different artificial variables for the fixed effects model, which are labelled as D(j), where j = 1,…,N (Baltagi, 2008; Green, 2003).

The random effects model does not use artificial variables (year of establishment, district, existence of the pub), but it does assume that individual effects are random quantities. Random effects model can be expressed similarly to the Individual effects model using the equations:

$$Y_{it} = \alpha + \beta X_{it} + \epsilon_{it} \qquad (3)$$

where, however

$$\epsilon_{it} = v_i + u_{it}. \qquad (4)$$

Random effects model can be expressed as a regression model; however, the random part of the regression is different. It is a combined random part that was created by combining a random element of a specific observation in a cross-sectional variable with a random element that is a feature of the cross-sectional variable (Baltagi, 2008; Green, 2003).

More formal recommendations regarding the suitability of each test are given by panel diagnostics, one of the most important ones being Hausman's test, which recommended to estimate the model using fixed effects for the chosen data sample.

Model of dependency of a beer's name was construed using the following equation:

$$Name\ of\ the\ beer_{it} = ß_0 + ß_1 Year_{it} + ß_2\, TypMPMR_{it} + ß_3 District_{it} \qquad (5)$$

Where:
I marks a specific state in the range of 1,…,n,
t marks a specific year in the range of 1,…,t,
Year is the year of establishment
Typ MP/ MR the type of brewery MP-microbrewery with taproom/MR –microbrewery without taproom
District expresses the area/region where brewery is located

RESULTS AND DISCUSSION

The fact that the principles of neo-localism have an impact on microbrewery names has already been proven several times, including a 2016 study by Holktarm. In the Czech environment, the influence of neolocalism in the selection of microbrewery names was demonstrated by Březinová and Linhartová (2023). The aim of the present research was to analyse how the principles of neolocalism are reflected in the product names of Czech microbreweries. Each microbrewery has several product lines, making it interesting to observe whether the principle of neolocalism is also applied to the selection of the names of individual products and product lines.

The results showed that 87% of the names of the Czech microbrewery beers studied bear neo-localism features, with the most frequent, as shown in Tab. 1, being geographical references (35%), which include, for example, names of towns, villages, mountains or watercourses, thus reinforcing the link of the product to the place. Historical themes include reminders of battles, important events or historical figures, often with regional significance; these appear in 16 % of beer names. Cultural and folkloric themes follow, referencing local traditions, festivals or fairy-tale characters and are used in 14% of beer names. The linguistic component of neo-localism is manifested by the use of dialect expressions, archaisms, or puns typical of the given region, and was identified in 9% of beer names. The next group is made up of references to local notables who have played a significant cultural, economic, heroic or other role in the region, and this principle appears in 5 % of beer names. Only 13 % of beer names do not use elements of neolocalism. These results are consistent with the findings of Holtkamp et al. (2016), who confirmed in their study the use of locally rooted names and visual local imagery in the names and labels of individual beers. The highest average was achieved by local imagery in the names of individual beers in Texas, at almost 50%. However, his findings are much lower than ours.

-Schnell and Reese (2003) conducted an analysis of beer names and the visual image of labels, using the following variables: historical figures, local nature, folklore, and topography. The study confirmed that beer names and labels deliberately create a "sense of place." Other research also demonstrates the use of neolocalism principles in beer brands and labels. Eberts (2014) demonstrated place branding through local product names and visual symbols in beers from Canadian microbreweries. Ikäheimo (2021) points to storytelling and local elements (landscape, ingredients) in beer names and labels, which is consistent with our findings.

Taylor and DiPietro (2019) point to the fact that customers' perception of neolocalism in taprooms increases trust, satisfaction, and attachment to the place/brand and supports the marketing effects.

It has therefore been proven that the principles of neolocalism are used to a much greater extent in Czech breweries when naming microbrewery products (87%) than when finding names for the microbreweries themselves (65%) (Březinová & Lihartová, 2023). These different results may be due to the microbrewery owners' own egos (for example 14% of Czech microbreweries carry the name of their owners or founders) and other reasons (e.g., an attempt at exaggeration, humour), where 21% of Czech microbreweries carry a name that is not related to the owner's name, nor do they use the principles of neo-localism.

Table 1 The principles of neolocalism used in the names of Czech microbrewery beers.

Categories	Number of observations	Share (%)
Geographical references	428	35 %
Historical motifs	193	16 %
Cultural and folklore motifs	175	14 %
Linguistic elements (dialect, archaisms)	112	9 %
References to local personalities	64	5 %
Other types of neolocalism	97	8 %
No identifiable reference	162	13 %

Source: Authors’ own work

In relation to the names of beers, the following variables were monitored: the year of establishment of the microbrewery, whether the microbrewery has its own establishment or not and the district in which the microbrewery operates. Of these selected variables, only the year of establishment was found to be relevant, where the fixed effects model identified the year of establishment of the microbrewery as a statistically significant variable, at a significance level of 0.05. However, the index of determination for this model is only 0.131960, and thus only 13% of the variability in the model is explained. The detailed results showed that the elements of neolocalism are more often used for beer names from 2015 onwards. Thus, microbreweries established in 2015 and subsequent years have been shown to make more frequent use of the link to the place where the microbrewery operates in the names of their beers. This finding supports the move away from the globalisation paradigm and towards the principle of localism. No statistical significance was found for the other variables studied.

Table 2 Fixed effects model for the Name of the beer

Variable	*Coeff.*	*Std. Error*	*t-ratio*	*p-value*	
const	1,19313	0,134238	8,888	1,12e-017	***
Year	0,0202366	0,00865920	2,337	0,0198	**
TypMPMR	0,0303929	0,0724962	0,4192	0,6752	
District	−0,00384483	0,00844942	−0,4550	0,6493	
R2	0,131960				
Adjusted R2	0,130880				
Prob (F-statistic)	0,154472				

Note: ***, **, and * represent statistical significance at the 1%, 5%, and 10% levels, respectively. Standard errors are in parentheses.
Source: Authors' own work

The last monitored factor was the use of the microbrewery's name in the names of the beers and the use of the microbrewery's brand on the labels of the beers produced. The results (Tab. 3) show that 44% of the beers studied carry the name of the microbrewery and use its brand on their labels. Another 50% of the beer names contained local references, whether in the form of dialect expressions, names of historical figures or cultural symbols of the region. The remaining 6 % were names with no clear link to the brewery or the locality, using common beer metaphors or humour and exaggeration.

Table 3 Proportion of beer name categories, use of brewery name and logo on beer labels.

Categories	Number of observations	Share (%)
Brewery name + beer type	542	44 %
Local links	617	50 %
General beer metaphors	36	3 %
Other	36	3 %

Source: Authors' own work

The results confirm the strong influence of neo-localism on the product identity of Czech microbreweries. The higher proportion of culturally relevant names reflects the effort to communicate authenticity and distinctiveness in a competitive environment. From a linguistic point of view, creative wordplay, metaphors and intertextual references appear in the names. Culturally, the references to local history and folklore can be observed.

From a marketing point of view, it is an effective strategy for building a brand with a distinct identity, and it is also a tool for cultural reproduction and local identity.

Neolocalism is thus an important element in the marketing strategies of Czech microbreweries. The names of beers are not chosen randomly, but thoughtfully reflect the cultural, geographical and historical context of the place of production. These names not only help to create a unique brand identity but also contribute to the maintenance and development of regional awareness and cultural continuity.

The use of neo-localist elements in the names has several benefits. It increases the attractiveness of products for local consumers and tourists alike, promotes local patriotism, creates a story around the brand and increases its memorability. Consumers perceive beers named in this way as more authentic and of higher quality, and perceived quality plays an important role (Doležalová et al., 2016). This approach also enhances the value of the place from which the product originates. Local origin has an impact on customer preferences (Adams & Salois, 2010; Pícha & Skořepa, 2018) and also on their willingness to pay a higher price for local products (Carpio & Isengildina-Massana, 2009, Pícha et al., 2013).

From the point of view of regional development, it can be said that the neo-localist orientation of microbreweries contributes not only to the promotion of the region, but also to its economic stability - by creating jobs, cooperating with local suppliers and promoting tourism. This creates a natural link between business and the cultural identity of the area.

Our findings confirm the hypothesis that neo-localism is a key factor in naming beer products from Czech microbreweries. Contrary to expectations, neither region nor type of establishment was found to have a significant effect, suggesting that the motivation to use neolocal elements is primarily based on internal branding strategy rather than external factors. Most previous studies on neolocalism come from North America (Shortridge 1996; Flack 1997; Schnell & Reese 2003; Holtkamp et al. 2016; Talmage et al. 2020). Our Czech study thus represents the first systematic analysis of neolocalism in Central Europe. It shows that neolocalism is not only a reaction to American globalization and homogenization, but also part of the construction of local identity in the Central European cultural space.

The limitation of the study is that it focuses only on Czech breweries, without international comparison. Furthermore, other manifestations such as label design, marketing strategies, stories on websites, community involvement, and the use of local ingredients are not included in the examined factors of neolocalism.

CONCLUSION

The results of the analysis of the names of beers from Czech microbreweries clearly confirm that neolocalism is a key element of the marketing communication of these entities. Of the 1,231 beer names examined, 87 % were clearly identified as having neo-localist features. This high proportion shows that neo-localism is not only a conscious branding strategy but also a culturally relevant way of communicating a product's identity to customers and the community.

The most commonly used principles of neo-localism included geographical references (35%), followed by historical motifs (16%) and cultural or folkloric elements (14%). A significant proportion of beers bore the brewery name or its brand directly on the label, indicating an emphasis on consistent brand identity and easy consumer identification. The results also showed that breweries founded after 2015 showed a greater tendency to use neo-local elements, which may be linked to the growing emphasis on authenticity and local story within the craft beer market.

Panel regression analysis confirmed that the year of brewery establishment is statistically significant in influencing the likelihood of using neo-localist elements in beer names. Other variables, such as region of operation or type of establishment (with vs. without an establishment), had no demonstrable effect. This result suggests that the neo-localist approach is the result of strategic decisions by specific entrepreneurs rather than a response to external factors.

The study concludes that the use of neo-localism is an effective marketing tool that strengthens the cultural value of the product, promotes consumer loyalty and contributes to sustainable regional development. Although the positive impact is predominant, the risks of over-commercialisation of cultural elements and loss of authenticity if these symbols are used mechanically or purposefully should also be noted.

The findings of the research show that neolocalism is an important element in the marketing communication of Czech microbreweries, and its use in the names of beer products is significantly higher (87%) than in the names of breweries themselves (65%). This fact opens space for the systematic implementation of neolocalistic elements in the creation of product portfolios. Breweries should actively seek out the cultural, linguistic and geographical motifs of their region and use them as an inspirational framework for the creation of new products. Collaboration with regional historians, ethnographers or linguists is also appropriate to ensure authenticity and cultural relevance.

From a marketing perspective, it is advisable to extend the neo-localist naming to other elements of brand communication, such as label design, brewery visual identity, website stories and social media content. This strengthens not only the emotional connection between the consumer and the brand, but also the perception of authenticity, which is key to the craft market. The research results also show that newer breweries (founded after 2015) exhibit a higher level of neo-localism, suggesting a transformation in the business mindset towards sustainable and culturally anchored branding.

At the level of regional policy and tourism development, the results can be used to support brands with a high degree of local identity through grant schemes, marketing alliances and destination management. Microbreweries that actively cultivate a neo-local identity can be drawn into cultural-tourist projects such as beer trails, gastrofestivals or regional quality labels. The implementation of the research findings thus goes beyond the level of individual enterprises and has the potential to contribute structurally to the development of the cultural and economic capital of the region.

The study significantly expands current knowledge about the role of neo-localism in product marketing in the food industry and brings a specific view of Czech microbreweries as cultural actors. While previous research has focused primarily on the branding of breweries as institutions. With over 1,200 beer names analysed, the study provides a robust data base for the typology of neo-local elements in the Czech environment.

The study confirms that neolocalism is not just a cultural framework with no practical function but a functional brand management tool with an impact on product differentiation, brand authenticity and the relationship with the place of origin. This approach also anchors microbreweries as carriers of cultural memory and regional identity, which strengthens their legitimacy in the eyes of consumers.

The theoretical contribution of our study lies, among other things, in demonstrating that neolocalism is not merely an "American phenomenon" but a universal mechanism of identity, marketing, and cultural reproduction. It also shows how entrepreneurs can use neolocalism to build their brands. Furthermore, it places neolocalism in the broader framework of theories of local identity, cultural capital, and place marketing, and provides new evidence that product names are becoming a tool for communicating a "sense of place." The research links linguistic structures (dialect, archaisms, puns) with cultural references and marketing strategy, demonstrating the interdisciplinary potential of the study of neolocalism. The use of the existing classification of neolocalist categories (geographical references, historical motifs, cultural and folkloric elements, linguistic elements, references to personalities) provides a verified methodological structure for examining cultural identity in branding.

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Original scientific paper

SOLO TRAVELLERS IN SOCIAL MEDIA: TRIPADVISOR FORUM ANALYSIS

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Abstract

This study examines the consumption patterns of solo travellers, exploring the nuances of their travel behaviour, the factors influencing their choices, and their preferred destinations. The authors used text-mining techniques to analyse the discourse surrounding solo travel on TripAdvisor forums. A comprehensive dataset of 74,672 English-language comments posted between January 8, 2008, and May 31, 2023, was collected from this forum and used as the basis for analysis in this study. The primary objectives were to: (1) delineate the intricacies of solo travellers' consumption behaviour; (2) examine differences in consumption behaviour among solo female travellers; and (3) identify the destinations most frequently discussed by this demographic. The findings reveal distinctive consumption behaviours among solo travellers, particularly in relation to financial considerations, safety concerns, and gender-specific issues. Notably, solo female travellers frequently discussed safety-related aspects, including preferences for secure destinations, interactions with locals or fellow female travellers, and ensuring safety during transportation. Regarding destination preferences, the analysis indicates a substantial focus on several regions. Europe emerged as the most prominent, mentioned in 8,029 cases, followed by America (2,368), Australia (2,346), and Asia (2,322).

Keywords: solo travel; consumption behaviour; female travel; TripAdvisor; text mining

INTRODUCTION

Due to changes in family structures and increasingly individualised lifestyles, 'spending singles' were identified as one of the top ten global consumer trends in 2016 (Kasriel-Alexander, 2016; Yang et al., 2022b). Solo travel has since become one of the fastest-growing segments in the tourism sector (Euromonitor, 2019; Solo Traveler, 2023). According to recent studies, however, solo travel remains a relatively under-researched segment, and only a limited number of works have examined the experiences of solo travellers (Bianchi, 2016; Brown et al., 2020; Yang, 2020; Yang et al., 2019).

Existing research has predominantly focused on women's solo travel experiences, particularly those of Asian women (Khan et al., 2021; Wynne-Hughes, 2023; Yang et al., 2017; Pereira & Silva, 2018; Seow & Brown, 2018; Thomas & Mura, 2019; Yang et al., 2019;

Karagöz et al., 2021; Terziyska, 2021; Hosseini et al., 2022; Otegui-Carles et al., 2022; Solo Traveler, 2023). Other studies have addressed solo travel in different contexts, such as its relationship to couple vacations (Coffey et al., 2024; Durko & Petrick, 2013; Durko, 2014).

Online travel reviews have been widely employed as an important data source in tourism research (Sung et al., 2020; Guo et al., 2021). Review platforms are essential not only for potential users of tourism services but also for visitors to destinations (Zervas et al., 2021). They provide valuable insights into travellers' perceptions, levels of satisfaction or dissatisfaction, and decision-making processes (Zelenka et al., 2021).

The use of TripAdvisor and similar platforms as databases for empirical analysis has become common in tourism research. Studies of tourist reviews on these platforms are typically consumer-oriented, focusing on tourists' use of such media and their influence on tourist behaviour (Özen, 2021). Although digital content plays a significant role in solo travel—with solo travellers relying heavily on various types of information obtained through social media (Cho et al., 2020)—this dimension has not yet been systematically examined in solo travel research. Cho et al. (2020) argue that this type of information constitutes a critical element in understanding the phenomenon of solo travel. Moreover, Pereira and Silva (2018) emphasise the need for qualitative methodologies (e.g., content analysis of travel blogs and forums) to identify additional motivational dimensions of solo travellers.

This paper addresses this research gap through a comprehensive qualitative analysis of discussions within the TripAdvisor travel forum. Its primary objective is to identify the most prevalent topics in solo travellers' conversations on the Solo Travel TripAdvisor forum and to compare these themes with insights from the existing literature. Building on prior scholarship on solo travel, we also examine the extent to which online discussions serve as a source of knowledge about individual consumption within the tourism market.

THEORETICAL BACKGROUND

In recent years, the solo travel sector has attracted growing academic interest and is beginning to take on a more clearly defined shape, although detailed and extensive research remains limited (Otegui-Carles et al., 2022). Moreover, no general consensus currently exists on the definition of a solo traveller. The modified definition proposed by Laesser et al. (2009), which distinguishes solo travellers according to specific criteria, has thus far been considered sufficiently appropriate (Otegui-Carles et al., 2022). Existing studies emphasise that solo travellers do not constitute a homogeneous group; segmentation and comparison are necessary to generate more nuanced insights and enhance comparability. Nevertheless, several core principles of solo travel can be identified.

Scholars generally agree that solo travellers are individuals who arrive at a destination alone, irrespective of whether they subsequently join a group or complete their journey with people they meet while travelling, provided they are not accompanied by friends or family (Otegui-Carles et al., 2022). Business travellers are typically excluded from this category. The prevailing consensus is that there are two main types of solo travellers: those travelling alone 'by default" and those travelling alone 'by choice" (Bianchi, 2016; French et al., 2017; Terziyska, 2021; Hosseini et al., 2022; Yang et al., 2022b).

As a heterogeneous group, solo travellers exhibit diverse motivations (Pereira & Silva, 2018; Osman et al., 2020; Terziyska, 2021; Ernszt & Marton, 2021; Yang, 2020; Ejupi & Medaric, 2022). Researchers have employed in-depth interviews and literature reviews to explore the underlying factors that shape solo travel motivations and constraints. Motivations may differ depending on whether individuals are first-time or experienced solo travellers (Bianchi, 2022). A substantial body of literature focuses specifically on women. These studies suggest that women who choose to travel alone are motivated less by the journey itself than by the experience of leaving their comfort zones, cultivating independence, and achieving autonomy (Bianchi, 2016; Pereira & Silva, 2018; Yang, 2020; Hosseini et al., 2022). Solo female travellers often seek personal growth and development through enhanced self-confidence and empowerment. Additional motivations include gaining prestige and escaping family roles, with the latter particularly relevant for Muslim women (Yang, 2020; Nikjoo et al., 2021; Hosseini et al., 2022).

Only a limited number of studies have examined gender differences in solo travel (Laesser et al., 2009; Heimtun & Abelsen, 2013; Bianchi, 2016; Yang, 2020). These works suggest that men exhibit different preferences from women (French et al., 2017; Osman et al., 2020). For men, personal feelings appear to play a less significant role than they do for women. Overall, women have remained the central focus of solo travel research, with recurrent themes including constraints, safety, travel behaviour, and the experiences of Asian women, who are often regarded as particularly vulnerable due to cultural and religious contexts (Otegui-Carles et al., 2022).

In contrast, the consumer behaviour of solo travellers has rarely been investigated, and when considered, it has typically been incorporated into surveys (Uatay et al., 2019; Sung et al., 2020; Bianchi, 2022). More commonly, research has addressed women's risk perceptions or other influencing factors associated with solo travel.

One notable exception is Cho et al. (2020), who analysed large-scale online hotel reviews to evaluate hotel services from the perspective of solo travellers and to derive managerial implications. Their results revealed the most frequently used keywords in reviews. Traveller attribute preferences and association rules showed significant differences between solo and non-solo travellers. Texts written by solo travellers were predominantly associated with negative emotions, whereas those by non-solo travellers included a mix of positive and negative emotions. Furthermore, relatively few review texts influenced solo travellers' satisfaction, while non-solo travellers' satisfaction appeared to be shaped by a more diverse set of keywords.

The application of text mining to analyse the opinions and questions of travellers expressed in TripAdvisor comments and reviews represents a novel research direction in the study of solo travel.

DATA AND METHODS

Several studies show that past experience predicts future behaviour (Albarracin & McNatt, 2005; Sommer, 2011; Ye et al., 2017). Building on this, we assume that forum posts provide a valid reflection of solo travellers' likely behaviours. We acknowledge, however, that some respondents may change their intentions or may not have the opportunity to act as stated.

The study addresses the following research questions:

(RQ1) What are the characteristics of solo travellers' consumption behaviour?

(RQ2) How does the consumption behaviour of solo female travellers differ?

(RQ3) Which destinations are most frequently mentioned by solo travellers?

A total of 74,672 English-language comments were collected from Solo Travel forum on TripAdvisor between 8 January 2008 and 31 May 2023 and used for the analysis in this study. The data collection process was carried out using a specially developed application programming interface (API). All comments from the Solo Travel forum were automatically recorded for text-mining analysis. Gender was determined according to self-reported information provided by forum participants during registration; however, the reliability of this information cannot be fully guaranteed.

In addition to quantitative text-mining analysis, word-for-word quotations from the forum were examined. These illustrative excerpts provided contextual detail and helped to interpret patterns identified in the computational analysis.

The analytical procedure followed the five-step framework of Ugur and Akbiyik (2020), which operationalises the foundational definition of text mining introduced by Feldman and Dagan (1995). Feldman and Dagan conceptualised text mining as the transformation of unstructured text into structured information through natural language processing (NLP) and statistical methods. Ugur and Akbiyik extended this by proposing a staged process that guides practical implementation. In this study, Feldman and Dagan's work provided the theoretical foundation, while Ugur and Akbiyik's model structured the execution of the analysis. The five steps were implemented as follows: (1) Data Collection: Retrieval of 74,672 English-language comments using a custom API. (2) Text Parsing: Segmentation of text into words and sentences. Stemming and lemmatisation were applied to normalise word forms (e.g., “travelling,” “travels” → “travel”). (3) Text Filtering: Removal of stopwords (e.g., “the,” “and”), low-frequency terms, high-frequency noise, and irrelevant forum-specific tokens (e.g., usernames, signatures). (4) Data Transformation: Construction of structured datasets by weighting words according to their cumulative frequency and distribution. Term Frequency–Inverse Document Frequency (TF–IDF) weighting was applied within WordStat 9. (5) Text Mining: Application of clustering, proximity plots, and multidimensional scaling to identify themes, behavioural patterns, and co-occurring terms. We employed the software WordStat 9, a content analysis and text-mining programme capable of rapidly extracting themes and automatically identifying patterns through clustering, multidimensional scaling, proximity plots, and related techniques.

The analysis used WordStat 9, a content analysis and text-mining programme that can automatically extract themes and identify patterns through clustering and related techniques. Through this combination of computational and illustrative approaches, the methodology enabled the identification of solo travellers’ behavioural characteristics, gender-based differences, and destination preferences.

RESULTS

We begin with descriptive statistics summarising the dataset, which is representative of the sample population. The dataset comprised 74,672 unique comments. Empty, deleted, or inappropriate comments (e.g. ‘This post has been removed at the author’s request”) were excluded. All comments were posted between 8 January 2008 and 31 May 2023 in the Solo Travel forum on TripAdvisor. The total text corpus consisted of 8,120,067 words, of which 4,970,535 were excluded. On average, each sentence contained 15.5 words and each paragraph 31.0 words.

Following the descriptive analysis, further examinations were conducted to explore word and phrase usage. Several lexical variants were grouped for analysis, such as travel/traveling/travelling, trip/trips, city/cities, http/www, year/years, and day/days. Table 1 presents the 26 most frequently used words within the forum, all with a frequency of 7000 or higher. Among the top 10 is PLACES, which appears primarily in questions regarding the best places to travel and recommendations for destinations suitable for solo travellers. Related terms such as PLACE, CITY, TOUR, COUNTRY, and DESTINATION also feature prominently. The only specific geographic reference among the top terms is EUROPE. Among the salient terms occurring within the top 30 words, several are of particular interest. For example, the term TRAIN appears 8,281 times. Another frequently discussed mode of transportation is

FLIGHT with 6,215 occurrences, followed by BUS with 4,624 occurrences and CAR with 4,285 occurrences. Solo travellers also frequently address issues related to BUDGET (7,462 occurrences), MONEY (5,942 occurrences), and EXPENSIVE (4,835 occurrences).

Table 1 Extracted words

		FREQUENCY	% SHOWN	% PROCESSED	% TOTAL	NO. CASES	% CASES	TF • IDF
1	TRAVEL	39631	1,96%	1,28%	0,49%	22417	30,02%	20710,4
	TRAVELLING	8392	0,42%	0,27%	0,10%	6428	8,61%	8938,2
	TRAVELING	6729	0,33%	0,22%	0,08%	5262	7,05%	7751,9
2	TRIP	29594	1,47%	0,95%	0,36%	18390	24,63%	18010,2
	TRIPS	7421	0,37%	0,24%	0,09%	5647	7,56%	8321,5
3	SOLO	29344	1,45%	0,94%	0,36%	18484	24,75%	17793,1
4	TIME	28979	1,43%	0,93%	0,36%	18682	25,02%	17437,7
5	PEOPLE	22740	1,13%	0,73%	0,28%	14636	19,60%	16093,9
6	GOOD	21655	1,07%	0,70%	0,27%	16102	21,56%	14428,2
7	FORUM	16047	0,79%	0,52%	0,20%	10413	13,94%	13729,5
8	PLACES	15242	0,75%	0,49%	0,19%	10857	14,54%	12764,4
	PLACE	11946	0,59%	0,38%	0,15%	9084	12,17%	10929,2
9	DAY	15149	0,75%	0,49%	0,19%	9531	12,76%	13543,5
	DAYS	13736	0,68%	0,44%	0,17%	8977	12,02%	12637,5
10	YEARS	13059	0,65%	0,42%	0,16%	11592	15,52%	10564,7
	YEAR	8640	0,43%	0,28%	0,11%	6978	9,34%	8894,2
11	CITY	12038	0,60%	0,39%	0,15%	8032	10,76%	11656,8
	CITIES	7601	0,38%	0,24%	0,09%	5556	7,44%	8576,9
12	GREAT	11891	0,59%	0,38%	0,15%	9436	12,64%	10682,5
13	THINGS	11038	0,55%	0,36%	0,14%	8153	10,92%	10616,8
14	WWW	10591	0,52%	0,34%	0,13%	7741	10,37%	10425,4
	HTTP	8527	0,42%	0,27%	0,11%	6165	8,26%	9236,7
15	TOUR	10138	0,50%	0,33%	0,12%	6146	8,23%	10995,3
	TOURS	6769	0,34%	0,22%	0,08%	4524	6,06%	8242,2
16	MAKE	9375	0,46%	0,30%	0,12%	7574	10,14%	9317,2
17	EUROPE	9161	0,45%	0,30%	0,11%	6545	8,76%	9685,5
18	TRAIN	8281	0,41%	0,27%	0,10%	5118	6,85%	9639,6
19	HOTEL	8205	0,41%	0,26%	0,10%	5663	7,58%	9190,5
20	COUNTRY	8160	0,40%	0,26%	0,10%	6323	8,47%	8749,4
21	STAY	8083	0,40%	0,26%	0,10%	6460	8,65%	8591,6
22	DESTINATION	7996	0,40%	0,26%	0,10%	6076	8,14%	8712,0
23	LOCAL	7827	0,39%	0,25%	0,10%	5641	7,55%	8780,3
24	VISIT	7802	0,39%	0,25%	0,10%	6226	8,34%	8418,0
25	LONG	7563	0,37%	0,24%	0,09%	6382	8,55%	8078,8
26	BUDGET	7462	0,37%	0,24%	0,09%	5834	7,81%	8261,9

Note: Frequency - The raw count of how many times the word appears in the dataset. %Shown - The percentage of total words displayed in the analysis that this keyword represents. %Processed - The proportion of the keyword relative to the cleaned or filtered text (after removing stopwords, punctuation, etc.). %Total - The keyword's share relative to the entire dataset, not just the words shown. No. cases - The number of forum posts that contain the word at least once. %Cases - The percentage of forum posts containing the word, relative to all documents in the dataset. TF – IDF (Term Frequency × Inverse Document Frequency) - A weighting measure used in text mining to highlight words that are frequent in a specific document, high TF–IDF = distinctive keyword.

To provide more detailed insights into the dataset, multi-word expressions containing a minimum of two and a maximum of five words were extracted and examined (see Table 2). Only phrases occurring at least 50 times were considered. Table 2 lists the 32 most frequently repeated phrases, all with a frequency of 800 or higher. Several of these phrases were grouped, for example solo trip, solo travellers, solo travel, solo traveller, and travelling solo.

Table 2 Extracted phrases

	FREQUENCY	NO. CASES	% CASES	LENGTH	TF • IDF
YEARS AGO	9090	8809	11,80%	2	8437,6
SOLO TRAVEL	5166	4215	5,64%	2	6449,0
SOLO TRIP	2826	2535	3,39%	2	4151,9
SOLO TRAVELLERS	1726	1491	2,00%	2	2933,6
TRAVEL SOLO	1358	1278	1,71%	2	2399,1
SOLO TRAVELLER	1296	1199	1,61%	2	2325,5
TRAVELLING SOLO	1194	1118	1,50%	2	2178,7
TRAVELING SOLO	1173	1099	1,47%	2	2149,1
SOLO TRAVELER	1153	1068	1,43%	2	2126,8
SOLO TRAVELERS	1147	1016	1,36%	2	2140,6
GOOD LUCK	3656	3623	4,85%	2	4804,3
TRAVEL FORUM	2148	1906	2,55%	2	3421,8
TRIP ADVISOR	1801	1443	1,93%	2	3086,7
TRAVEL INSURANCE	1328	1025	1,37%	2	2473,3
TOP QUESTIONS	1316	1113	1,49%	2	2403,9
PUBLIC TRANSPORT	1289	1129	1,51%	2	2346,6
DAY TRIP	1264	1077	1,44%	2	2327,0
DAY TRIPS	1181	1036	1,39%	2	2194,1
DESTINATION FORUMS	1245	1121	1,50%	2	2270,3
MEET PEOPLE	1177	1052	1,41%	2	2178,8
LONELY PLANET	1166	1086	1,45%	2	2142,3
SOLO FORUM	1076	998	1,34%	2	2016,5
COSTA RICA	1050	837	1,12%	2	2048,0
SOUTH AMERICA	1037	876	1,17%	2	2002,1
SINGLE SUPPLEMENT	1021	799	1,07%	2	2012,0
TIME OF YEAR	932	877	1,17%	3	1798,9
GREAT TIME	907	885	1,19%	2	1747,1
GOOD IDEA	900	868	1,16%	2	1741,2
SOLO FEMALE	887	829	1,11%	2	1733,7
SAN FRANCISCO	873	678	0,91%	2	1782,6
CREDIT CARD	846	640	0,86%	2	1748,7
TRAIN TRAVEL	828	683	0,91%	2	1688,1

Note: Frequency - The raw count of how many times the phrase appears in the dataset. No. cases - The number of posts that contain the phrase at least once. %Cases - The percentage of forum posts containing the phrase, relative to all documents in the dataset. TF – IDF (Term Frequency × Inverse Document Frequency) - A weighting measure used in text mining to highlight words that are frequent in a specific dataset.

Table 2 illustrates four thematic categories: (1) health concerns (insurance), (2) financial concerns (single supplement, credit cards), (3) social concerns (meeting people, solo female travel), and (4) transport concerns (public and train travel). Health concerns are primarily demonstrated through discussions on travel insurance. Respondents debated the most appropriate insurance companies, policies, and regulations. For instance, one traveller noted: 'I travel for at most a month at a time, and am never without travel insurance.' Financial concerns were evident in discussions of the single supplement and credit card usage. One respondent remarked: 'Finding solo supplement-free resorts is harder and harder these days, especially now that travel has accelerated.' Another stated: 'If you don't want to pay a single supplement, don't use a tour operator as it's always their policy.' Further concerns centred on credit card transactions, conversion rates, and security. As one traveller advised: 'If you use a credit card for goods and services, you may be offered the choice of paying in the local currency … the conversion rate back to your own currency can be eye-wateringly poor, so I would suggest you opt for paying in the local currency.'

Solo travel does not necessarily imply isolation. Many respondents emphasised the importance of social interaction, often seeking opportunities to meet fellow travellers or locals. For example: 'A friend of mine who often travels alone says that you meet people all the time—at the airport, in hostels…' and 'Only reason I am looking at a hostel is to meet people.' Transport-related concerns included advice on modes of travel and connectivity. A recurring theme was the preference for trains in Europe, described as both convenient and efficient: 'Most European countries have great train networks and that is a particularly good way for a solo traveller to travel.'

Destinations also emerged in the extracted phrases, notably Costa Rica, South America, and San Francisco. These discussions frequently overlapped with COVID-19 travel restrictions and quarantine requirements. For instance, one respondent advised: 'If you only have two weeks and it's your first foreign trip, I suggest you focus on Costa Rica.'

To address Research Question 3 (RQ3), we conducted a named-entity extraction (Table 3). This analysis revealed the most frequently mentioned locations (frequency ≥ 2,000). Europe (8,029), London (4,653), and the UK (4,136) were the most prominent. Europe was commonly described as safe and easy to navigate: 'I think Europe would be easier planning and travelling to figure out but likely more expensive.' When not referring to Europe broadly, travellers frequently mentioned specific cities, including London (4,653), Paris (3,497), Rome (2,354), Amsterdam (2,085), Barcelona (1,846), Prague (1,498) and Venice (1,494). Countries such as the UK (4,136), Italy (3,020), Thailand (2,725), Japan (2,643), Spain (2,421), Australia (2,346), and Mexico (1,707) also appeared prominently. The differences between continents are clear: Europe (8,029 mentions) dominated discussions compared with America (2,368), Australia (2,346), and Asia (2,322).

Table 4 Extracted topics

NO	KEYWORDS	COHERENCE (NPMI)	EIGEN VALUE
1	HTML; TRIPADVISOR; WWW; SHOWFORUM; HTTP; HTTPS; SHOWTOPIC; AU; UK	0.429	4.01
2	EARLY; LATE; MID; NOVEMBER; OCTOBER; MARCH; DECEMBER; APRIL; JANUARY; SEPTEMBER; FEBRUARY	0.333	3.10
3	LAPTOP; APP; CONTENT; PHONE; LIMITED; ADVISOR; ACCESS; FULL; WEBSITE	0.509	2.93
4	AGO; EDITED; YEARS	0.121	2.49
5	TOP; PAGE; SIDE; QUESTIONS; HAND; SECTION; LINKS	0.397	2.43
6	SUPPLEMENT; SINGLE; CHARGE; ROOM; DOUBLE; PAY	0.364	2.39
7	HISTORY; ART; ARCHITECTURE; MUSEUMS; CULTURE; FOOD; NATURE	0.363	2.35
8	TOUR; GROUP; TOURS; ESCORTED; COMPANIES; COMPANY; ORGANISED; JOIN	0.331	2.30
9	PLANET; LONELY; ROUGH; GUIDES; GUIDE	0.447	2.22
10	DC; WASHINGTON; BOSTON; YORK; CHICAGO; NYC	0.447	2.15
11	CAMBODIA; LAOS; VIETNAM; THAILAND; MALAYSIA; INDONESIA; SINGAPORE	0.441	2.09
12	TICKETS; TICKET; BUY; BUYING; PASS; ADVANCE; PLANE; BOUGHT; ROUND	0.308	2.04
13	CREDIT; CARD; CARDS; CASH; BANK	0.420	1.98
14	HONG; KONG	0.290	1.94
15	RICA; COSTA	0.260	1.94
16	DINNER; LUNCH; MEAL; RESTAURANT; TABLE; BREAKFAST; EAT; EATING; SIT; EVENING	0.409	1.88
17	PRAGUE; BUDAPEST; VIENNA; BERLIN; MUNICH	0.338	1.85
18	SOUTH; AMERICA; CENTRAL; AFRICA; NORTH; EAST	0.285	1.83
19	LAS; VEGAS	0.321	1.78
20	ENGLISH; SPEAK; LANGUAGE; SPEAKING; SPANISH; FRENCH; ITALIAN	0.395	1.75
21	PUBLIC; TRANSPORT; TRANSPORTATION; SYSTEM	0.282	1.73
22	BOX; SEARCH; ABOVE; THREADS; TYPE; CLICK	0.349	1.70
23	SEASON; RAINY; PEAK; HIGH; LOW; PRICES	0.309	1.69
24	QUESTION; FORUM; ANSWER; POST; SPECIFIC; QUESTIONS; ASKED; ANSWERS; POSTING; POSTED; ORIGINAL	0.324	1.67

Table 4 (continued)

25	TRAVELLERS; FELLOW; SOLO; TRAVELERS; TRAVELLER; FEMALE	0.231	1.66

Note: Coherence (NPMI) - Normalized Pointwise Mutual Information looks at how often the top words co-occur across the dataset. Eigenvalue - How much the topic contributes to explaining the data structure. It represents the amount of variance (information) that the topic explains. Higher eigenvalue = stronger, more influential topic.

Returning to the research questions, several conclusions can be drawn. RQ1 examined aspects of solo travellers' consumption behaviour. The analysis revealed three recurring themes in the forum discussions: financial considerations, safety concerns, and gender-related issues. These themes should be interpreted as important concerns expressed by solo travellers rather than as characteristics that are necessarily unique to them, since the study does not provide a direct comparison with general travel behaviour. R: 'I don't want to spend a lavish amount of money, but I am also not on a super-strict budget.' R: 'Go to booking.com and search for hotels. That will be your biggest single cost.' Questions about safety are connected to insurance, staying safe during travel (also with a focus on women travelling solo) and destinations. R: 'I find safety is far more about how one behaves than it is about where one is. Behave in a safe manner and chances are you'll be just fine.'

RQ2 focuses on the consumption behaviour of solo female travellers. Gender was identified based on self-reported information provided by forum participants at registration; however, the accuracy of this data cannot be assured. There were many topics in this area. Mostly women were asking about safe destinations for women, meeting other local or travelling women and safety during transportation. R: 'There will be many women wandering, driving, on public transport travelling around alone.' R: 'I was really nervous travelling to Greece, (and as a black female, I was worried about the possible racism I may face, but I didn't at all)...' R: 'But I agree that for single female travellers strongly Muslim countries are likely not a great idea. There are other places that are similar for other segments of travellers.' R: 'I don't think Jordan is a very good choice for solo female travellers...' Solo travellers do not select destinations solely because they are suitable for solo travel; for example R: 'As a solo traveller I do not choose my destinations based on being a solo traveller - I choose destinations that I want to visit. My travel status has zero to do with it.' Another traveller has different reasons for visiting, stating: 'I often choose my destination by weather first and then how difficult visas going to be, once I have those two things sorted, I start looking at things that I really want to experience in a place.'

RQ3 was asking about the most frequently mentioned destinations by solo travellers. Our analysis indicates a substantial focus on various regions. Europe emerged prominently in discussions, with 8,029 cases, followed by mentions of America in 2,368 cases, Australia in 2,346 cases and Asia in 2,322 cases.

DISCUSSION

When contrasting the outcomes of our investigation with those of other researchers, certain recurring themes emerge. The three themes identified in this study—finance, safety, and gender—are well supported by existing literature. In addition, previous research by Yang et al. (2022a) and Kachru et al. (2021) highlights two further themes: autonomy/self-actualization and structured social interaction.

Building on the findings of Zavodna (2024), who examined patterns of behavior among senior travelers on TripAdvisor, several parallels can be identified. Analysis of discussions on TripAdvisor indicates that seniors predominantly focus on topics such as insurance, tour operators, payment processes, destinations, and customer service. Within these domains, their primary concerns are related to health, safety, and the overall quality of services. Solo travel is not seen as a major barrier—many seniors reported confidently traveling alone or joining groups in the final destination. Moreover, findings of Goodwin and Lockshin (1992), who uncovered discriminatory practices against solo travellers such as single supplements in the tour, cruise and accommodation sectors, our study reached similar conclusions. Participants in forums often discussed single supplement payments and strategies to avoid them, indicating a shared concern about marketing practices that emphasise togetherness and discriminate against solo consumers. Similar findings are reported by Massidda et al. (2022). They note that solo travelers incur higher per-capita costs due to single supplements on rooms and tours, and often compensate by reallocating their budgets—spending more on accommodation while reducing expenditures on food and transport (e.g., opting for public transport and casual dining)

A recent study conducted by Bernard et al. (2022) identified perceived risk and safety as a primary constraint for solo female travellers, a finding reflected in the consumption behaviour of solo travellers in our study. This research also highlighted constraints related to fear or uneasiness stemming from participants' familial ties, where family commitments and lack of support influenced travel constraints. Similar results were observed in the study by Wilson and Little (2008), who emphasised spatial constraints, often termed the 'geography of women's travel fears,' as significant factors. Additionally, Teng et al. (2023) found out in their research that solo women display higher risk perception, avoid unsafe products, and seek women-only or central lodging.

An examination of solo travel through the work of Daniels (2008) and Falconer (2011) reveals a predominant focus on women's assessments of risks and safety. They note the existence of dedicated chapters on women's safety in travel guidebooks. In our study, guidebooks like Lonely Planet emerged as a noteworthy topic, ranking ninth in the extracted themes. Respondents endorsed guidebooks as credible sources for solo travel, a sentiment echoed by Caruana et al. (2008) and Elsrud (2005). Additionally, these researchers observed that gendered discourses, mediated through guidebooks like Lonely Planet, could potentially limit the actions and subject positions of women engaging in solo backpacking.

Overall, the topics are connected to frequent topics in the literature and found by experts. However, discussions and questions on TripAdvisor revolve more around recommendations in the most common two to three specific areas and around questions about the most common two or three problems. The questions are of a purely practical nature, i.e. they reflect people's real insight into what they expect during travel or experience. This may also be indicated by the frequent usage of 'year/s ago' or 'good luck'.

CONCLUSION

This study contributes significant findings to the knowledge base of professionals in the tourism industry. The practical and managerial implications of this research extend to tourism destination managers, offering valuable insights into the specific consumption behaviour of solo travellers in the realm of travel.

As a recommended source for destination marketing, this study provides a foundation for building strategies that capitalise on destinations perceived as safe and suitable for solo travellers. It serves as an informative resource for shaping the offerings of tourism entities. For effective communication of these offerings, it is beneficial to concentrate on four primary categories: 1) Health concerns, 2) Money concerns, 3) Meeting people concerns and 4) Transport concerns. Using these categories as focal points can strengthen the effectiveness of destination marketing efforts in catering to the unique preferences and considerations of solo travellers. Practical implications of this study include several recommendations for practitioners (hotel managers, destination managers,…): 1) It would be helpful for solo travellers to add information about practical things in the destination, this includes payments – especially about credit and debit card usage, visas, safety, health risks, doctors nearby, daily budget, exchange rates, currency etc. 2) Solo travellers often want to meet new people, give them information on where to meet local people or where they can meet other travellers. 3) Give information about safety in the destination with the focus of women (solo travelling). 4) Provide tips on what to visit in the destination, with a focus on solo travellers (e.g., places, restaurants).

Several limitations should be acknowledged in the interpretation of our findings. Firstly, it is important to recognise that a considerable segment of solo travellers may abstain from participating in online discussions, leading to potential sampling bias. This implies that the insights gained from our study might not be fully representative of the entire spectrum of solo travellers, as those who refrain from engaging in online discourse may hold distinct perspectives. Secondly, the authenticity of the information provided by online discussants remains a challenge. Verification of the accuracy of self-disclosed information about travel behaviour and preferences is inherently difficult, introducing an element of uncertainty into our study results. Trustworthiness and reliability of the data are contingent upon the honesty and transparency of the individuals sharing their experiences on the TripAdvisor forums. False postings remain a persistent challenge for social networking services.

In this study, data were collected exclusively from the Solo Travel forum. As a result, our analysis is limited to the perspectives of individuals who self-identify as solo travellers. Consequently, we were not able to compare solo traveler behavior with general travel behavior, which would have been particularly relevant for addressing Research Question 1 and Research Question 3.

Furthermore, it's crucial to note that this study focused exclusively on English-speaking forums, thereby limiting the generalisability of our findings to a specific linguistic and cultural context. Non-English-speaking solo travellers may exhibit diverse consumption behaviours and preferences that are not captured within the scope of our research. Lastly, the participants contributing to discussions on TripAdvisor are inherently a specific subgroup with distinct interests and characteristics. This selectivity introduces a potential source of bias, as the preferences and behaviours of TripAdvisor participants may not be wholly representative of the broader population of solo travellers. Generalisations from our study should be made cautiously, considering the unique characteristics of those who actively engage on the TripAdvisor platform.

In future research endeavours, it would be insightful to delve into several key questions. Firstly, the investigation could focus on understanding why Europe consistently emerges as a top-recommended destination for solo travellers in forums and what distinctive advantages it holds over other continents. Additionally, exploring how destination management can leverage these advantages could provide valuable insights for the industry. Moreover, given the identification of certain destinations as particularly advantageous for solo travellers, there is an opportunity to extract lessons from these examples and to consider strategies for replicating their success. Another crucial area for exploration lies in the realm of technology's impact on solo travel. This involves questioning and scrutinising the role of technological tools such as mobile apps and social media in facilitating and shaping the overall experiences and decision-making processes of solo travellers.

Furthermore, the research could extend to investigating the environmental and socio-cultural impacts of solo travel, with a dedicated focus on sustainable practices and responsible tourism. Understanding the ecological and social implications of solo travel can contribute to fostering more conscientious travel behaviour. The potential health benefits and challenges associated with solo travel present another avenue for enquiry, encompassing aspects such as stress reduction, mindfulness and the overall impact on the well-being of individuals undertaking solo journeys. Exploring the intersection between solo travel and digital nomadism could shed light on how the prevalence of remote work influences travel patterns and contributes to the unique lifestyle of solo travellers. This aspect reflects the evolving dynamics of work and travel in the contemporary landscape.

Deeper insights into the gender-specific experiences of solo travel, considering safety concerns, societal perceptions and the influence of gender on individual travel choices, represent rich areas for research. Understanding these dynamics can inform more inclusive and responsive travel practices. Assessing the economic contributions of solo travellers to local economies, including an exploration of spending patterns, accommodation preferences and participation in local activities, offers a comprehensive perspective on the economic impact of solo travel. Lastly, investigating the accessibility of destinations for solo travellers with disabilities, including an examination of challenges and opportunities for enhancing inclusivity in solo travel, aligns with the broader goal of promoting accessible and equitable travel experiences. Each of these research avenues contributes to a more nuanced understanding of solo travel, enriching the discourse on this evolving and diverse travel phenomenon.

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Original scientific paper

MANAGEMENT OF WALKING HOLIDAYS POPULARIZATION IN RURAL AREAS

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Abstract

Walking has transformed from a non-formal recreational activity into an economically beneficial tourist product. The walking holiday is a driver of tourism-based local socio-economic development. Last seven decades due to progressive urbanization, millions of people all over the world have been walking and exploring map footpaths in nature. This study aims to investigate factors that could contribute to the extensive popularization of walking holidays in rural areas. Data was collected through a survey method and subsequently processed using the SPSS software. The main result, especially among the educated population from secondary school to higher, specified that the most impactful factor in the popularization of walking holidays in rural areas was the promotion of rural walking tours at the world's leading tourism fairs, and travel portals and blogs. In addition, the popularization of walking holidays in rural areas was equally important to females and males. The youngest population most preferred the factor of popularization such as the organization of traditional sports events, while students were rather for the introduction of countryside walking competitions. This study contributes to bolstering the advancement of rural tourism development by enhancing the popularization of walking holidays in rural regions.

Keywords: countryside walking tours, rural tourism, socio-economic development, tourism fair, travel portal, travel blog

INTRODUCTION

From an informal recreational activity, walking has grown into a formal recreational activity and a serious tourism product of socio-economic importance. Walking is one of the drivers of socioeconomic development and growth in developed and developing countries. Progressive urbanization and industrialization have contributed to the fact that people around the world, from year to year, are walking in increasing numbers to, with the help of maps of rural walking trails, go around and enjoy untouched nature, have recreation, and breathe clean air. This is supported by research data that the number of adults in England engaging in leisure walking grew by 18% between May 2020 and May 2021, reaching a total of 24 million participants (UK Cycling and Walking Holidays Market Report, 2021). Walking holidays have increased by 52% since the pre-pandemic period (Travel Trends Report, 2023).

The PaRx program in Canada allows doctors to prescribe walking as a therapy to improve mental and physical health, where the recommended time of walking in nature is at least two hours a week, with free entrance to a national park (PaRx, 2022). Prescribing walking as therapy contributes to the popularization of walking because it focuses on it as a simple, natural, and effective way to improve health. When doctors recommend walking as medicine, it gives walking legitimacy as a serious health activity. People are becoming more aware of its benefits, which may attract more people to regular walking. Prescribing walking as therapy contributes to tourism, especially ecotourism, as it stimulates people to explore natural destinations. Increased interest in nature walks can lead to more visits to rural locations, supporting local tourism and economic growth.

The purpose of this research was to investigate the factors of importance for an even more intensive popularization of walking holidays in rural areas and to point out the measures that the local rural community can take so that more people decide on walking holidays in rural areas. In this way, the research contributes to the improvement of the development of rural tourism by introducing the popularization of rural walking holidays into the strategic planning documents of rural areas.

THEORETICAL BACKGROUND

Physical activity is important for achieving optimal health. It is preventive, but also a cure for many health conditions (Mau et al., 2020; Exercise in Medicine, 2021a). Regular brisk walking, cycling, and swimming have a great impact on health (Kotera et al., 2021; Exercise in Medicine, 2021b). According to the American College of Sports Medicine and American Heart Association, brisk walking is recommended a minimum of five days per week for at least 30 minutes a day (Walking 101, 2023). As per Thoreau, H.D. (2024) “the art of Walking” not many people understand, since “Walker is a sort of fourth estate, outside of Church and State and People", and "leisure, freedom, and independence are the capital in this profession". The results of Olafsdottir’s research indicate that emotions and therapeutic effects as impacts of spending time in nature are relational outcomes that depend both on the effect of nature and on what the individual contributes to the relationship (Olafsdottir, 2013).

A walking holiday means any kind of walk on a mountain, by a river, a lake, a canal beach, across wetlands, or along beaches, but what most walking holidays have in common is that they take place in the countryside (Field, 2017). There are many motivations for going on a walking holiday: views, exercise, company, wildlife, outdoors, a doctor's recommendation for health benefits, and fun (Field, 2017; Milojković et al., 2023b, Milojković et al., 2023c). Any kind of walking holiday can be rejuvenated with the feeling of doubled holiday time (Field, 2017). British experts for walking holidays emphasize the importance of having the most important information and advice for a walking holiday available, as well as information on accommodation and food (Encounter Walking, 2023). The development of a walking product includes recreational and amenity development, tourism development, health and fitness promotion, social inclusion, and training and education (Western Region and Western Development Tourism Programme, 2005) contributing the sustainable local socio-economic development (Milojković, 2023a). Carlson et al. (2018) found that rural areas had a lower prevalence of walking than urban areas. Regular walkers, women, highly educated people and those who make $35,000 or more per year are groups who use the walking trails, but walking trails may be beneficial in promoting physical activity among women and people in lower socioeconomic groups as groups at the highest risk for inactivity (Brownson et al., 2000) taking into consideration that rural residents reported more walking for transportation than urban residents (Bucko et al., 2021). Ways to increase the need for walking include improving infrastructure and walking environments, increasing safety for walkers, adopting policies and planning for walking environments, and educating and encouraging people to walk more (Queensland Government, 2023). In the tourism industry, managers promote places, content, and place offerings (OECD, 2022). Unlike other industries where competition can be local, here it is global. Therefore, rural tourism marketing must build a very good image of its rural destination and use different promotional tools such as the power of electronic media: radio, television, videos, audio, CD-ROM PowerPoint presentations, and other online content such as portals and blogs (Morton, 2018; Milojković, 2023c). The Internet, as a communication tool for travel and tourism, contributes to the promotion, distribution of tourism products, communication, management, and research, and the increasing number of travel blogs affects the mentioned functions of the Internet while the actors in tourism use blogs and portals as part of their business strategy (Schmallegger & Carson, 2008; Bi & Kim, 2019; Haris & Gan, 2021). A quality tourist experience affects the satisfaction of tourists, and together they contribute to building the trust of tourists, which contributes to sharing the tourist experience on social media (Wang & Wong, 2021; Islam, 2021; Idbenssi, 2023).

In the Fordian phase of tourism (1950-1975), dominated by mass tourism, tourist fairs facilitated the sales function of travel companies (Fayos-Solá et al., 1994; Cai et al., 2019). The social impacts of events financed by local authorities exceed the economic benefits thereof (Getz, 1989; Quinn, 2009). There are festivals as socially and culturally important events that influence the construction of the identity of places and communities, while large events, such as sports events, are those that can be repeated, have a limited duration, and are developed to increase awareness, attractiveness, and profitability of a tourist destination in the short and /or long term (Brent Ritchie, 1984; Quinn, 2009). Reasons to include a contest in an event are greater visitor engagement, dopamine effect, visibility and humanization of the brand, and greater productivity in the workplace (Bizbash, 2023). Besides fun, interactive, and engaging experience for attendees, competition assists in achieving the event goals (Bizbash, 2023).

Neumeier & Pollermann (2014) indicate that in most rural regions, tourism can have only small economic impacts, but that is why it has important non-economic implications and it is necessary to approach it strategically based on the consideration of the specific regional situation and potential successes. The development of rural tourism contributes to the economic empowerment of the rural environment by encouraging the settlement of villages and the revival of agricultural production (Dashper, 2014; Milojković, 2023a; Fafurida et al., 2023). Dashper (2014) emphasizes that the rich possibilities of rural tourism are the reason for numerous active rural types of research that can contribute to moving consumers away from mass tourism products and creating an offer according to consumer needs. In addition to traditional activities in the village such as walking, horse riding, and bird watching, countryside tourism also includes modern activities such as adventure sports, taking care to preserve the rurality and peace that is absent in the urban environment (Chalip & Costa, 2006). Planning, monitoring, and management would ensure the development of rural tourism that benefits the environment and the local community (Agayi & Gündüz, 2020). The local community is of great importance in implementing the principles of sustainable tourism (Manaf et al., 2018; Ćurčić et al., 2021; Akıncı & Öksüz, 2022).

Research shows that there are various methods of rural tourism development, so by popularizing them, it is possible to combine different methods of development and achieve positive impacts on the observed rural area and in the specific local community (Antonietta, 2021).

By reviewing the literature, the author did not come across a study dealing with the subject of this study, so the current study will have a significant contribution both to the initiation of similar studies in rural areas, and to the completion of knowledge about rural tourism by introducing countryside walking tourism as a new tourist product. Based on above mentioned in the current part of the paper, the author presents the following six interconnected hypotheses: (H1) The promotion of rural walking tours at the world's leading tourism fairs, and travel portals and blogs is a key factor in the popularization of walking holidays in rural areas.

(H2) The factors of popularization of walking holidays in rural areas are more important for women than for men.
(H3) The middle-aged population prefers the voucher system for countryside walking tours among the popularization factors of walking holidays in rural areas.
(H4) Regardless of marital status, people prefer the organization of traditional sports events are among the popularization factors of walking holidays in rural areas.
(H5) Educated people, starting from secondary school and above, most prefer the promotion of countryside walking tours at the world's leading tourism fairs, and travel portals and blogs are among the popularization factors of walking holidays in rural areas.
(H6) The students prefer the organization of traditional sports events.

DATA AND METHODS

For this paper, the author used a quantitative approach. The hypothetic-deductive and statistical methods were implemented in the study. The survey was realized using an electronic questionnaire in Serbian and English language developed by structured multiple-choice questions, designed to capture different aspects of motivation, demographic characteristics, and attitudes of respondents towards walking holidays, and disseminated to the public through academic and social media channels. The diverse sample, representing various demographic and socioeconomic groups across cultures, regions, and economic conditions, enables a comprehensive analysis of factors influencing walking holidays' popularity. Conducted via global platforms with culturally neutral questions, the study provides insights applicable to diverse contexts. The cumulative count of collected questionnaires was 467 between March and May 2022. The data was analysed using the SPSS software. The t-test and Kruskal-Wallis H Test were utilized to attain a detailed analysis of statistically noteworthy based on the following classification factors: gender, age, marital status, offspring count, educational attainment, employment status, and yearly individual expenditure on tourist trips and holidays. The t-test compares means between two groups (males and females) to identify significant differences, assuming normal data distribution. The Kruskal-Wallis H Test, a non-parametric test, evaluates differences among multiple groups (e.g., age, marital status, or education) without assuming normality. Together, these tests analyse demographic and socioeconomic impacts on walking holiday popularity, ensuring robust results.

RESULTS AND DISCUSSION

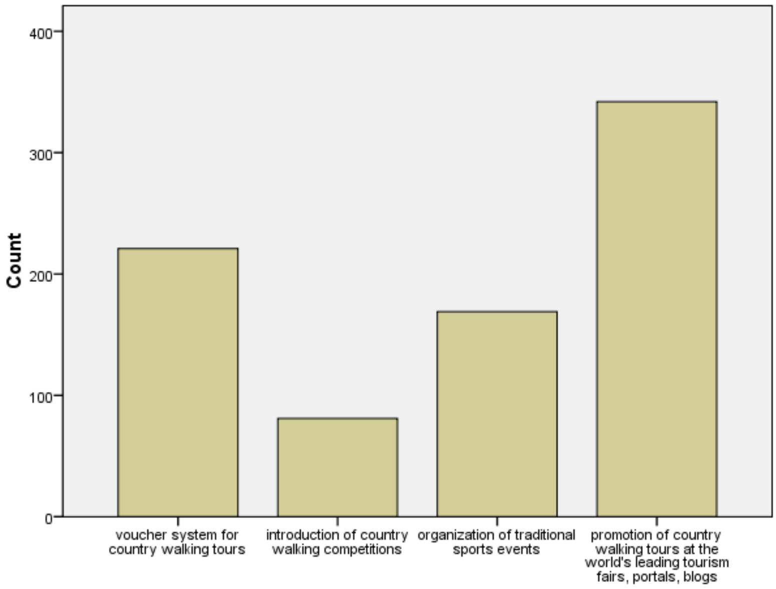
In the study, 467 respondents participated. From the aspect of demographic characteristics, more women participated than men did. The structure of respondents indicated the following lead: aged from 36 to 55 years, married, with children, university educated, employed, and respondents who annually invest in tourist vacations up to EUR 1,000 (Tab. 1).

Table 1 Survey participants' data analysis

CLASSIFICATION FACTOR	NUMBER OF RESPONDENTS
Gender	female (310) male (157)
Age	≤ 25 (82) 26 – 35 (54) 36 – 45 (119) 46 – 55 (128) ≥ 56 (84)
Marital status	single (125) cohabitation (61) married (238) divorced (29) widow/widower (14)
Offspring count	0 (182) 1 (100) 2 (142) 3 (41) 4 (2)
Educational attainment	without formal education (2) primary education (3) secondary education (92) college (60) university (310)
Employment status	student (71) unemployed (30) self-employed (46) employed (280) retired (30) other (10)
Annual personal investment for a tourist trip	<500 EUR (180) 500 – 1,000 EUR (159) >1,000 EUR (128)

The results of the study of what would contribute to the popularization of walking tourism in rural areas are shown in Fig. 1.

Figure 1 Analysis of contributions to the popularization of walking tourism in rural areas



Source: Author's analysis

The most frequent factor was the "promotion of countryside walking tours at the world's leading tourism fairs, portals, blogs" (F4) supported by 342 (73.2%) respondents. In addition, factors followed: "voucher system for countryside walking tours" (F1) 221 (47.3%), "organization of traditional sports events" (F3) 169 (36.2%), and "introduction of countryside walking competitions" (F2) 81 (17.3%). The results of descriptive statistics confirmed hypothesis H1.

The study examined the existence of differences in looking at the factors of popularization of walking holidays in rural areas between females and males. (Tab 2).

Table 2 The t-test results and statistically significant differences by classification factor "gender"

	t-test for Equality of Means						
Factors of the popularization of walking holidays in rural areas	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
						Lower	Upper
F1	1.24	315.49	0.217	0.06	0.05	-0.04	0.16
F2	-1.19	287.07	0.234	-0.05	0.04	-0.12	0.03
F3	-1.45	302.80	0.149	-0.07	0.05	-0.16	0.02
F4	1.29	295.85	0.197	0.06	0.04	-0.03	0.14

Source: Author's analysis

The independent samples t-test was used to compare the results of the examination of the factors of the popularization of walking holidays in rural areas women and men. There were no significant differences between women and men, as indicated by the following analysis of the results:

- F1 between females ($M=0.49$, $SD=0.50$) and males ($M=0.43$, $SD=0.50$), $t(315.49)=1.24$, $p=0.22$, Mean difference 0.06, 95% CI: -0.04 to 0.16, eta square=0.003, meaning that the gender difference for factor F1 was very small;
- F2 between females ($M=0.16$, $SD=0.37$) and males ($M=0.20$, $SD=0.40$), $t(287.07)=-1.19$, $p=0.23$, Mean difference -0.05, 95% CI: -0.12 to 0.03, eta square=0.003, meaning that the gender difference for factor F2 was very small;
- F3 between females ($M=0.34$, $SD=0.47$) and males ($M=0.41$, $SD=0.49$), $t(302.80)=-1.45$, $p=0.15$, Mean difference -0.07, 95% CI: -0.16 to 0.02, eta square=0.005, meaning that the gender difference for factor F3 was very small;
- F4 between females ($M=0.75$, $SD=0.43$) and males ($M=0.69$, $SD=0.46$), $t(295.85)=1.29$, $p=0.20$, Mean difference 0.06, 95% CI: -0.03 to 0.14, eta square=0.004, meaning that the gender difference for factor F4 was very small.

Based on the results of the t-test, hypothesis H2 was not confirmed.

The study analysed the existence of significant differences in the perception of the factors of popularization of walking holidays in rural areas by the following classification factors: age, marital status, offspring count, educational attainment, employment status, and yearly individual expenditure on tourist trips and holidays (Tab 3).

Table 3 The results of the Kruskal-Wallis H Test

	Factors influencing the popularity of walking holidays in rural areas by age group			
	F1	**F2**	**F3**	**F4**
Chi-Square	13.73	4.06	20.16	2.07
df	4			
Asymp. Sig.	.008	.398	.000	.723

Table 3 (continued)

	Factors influencing the popularity of walking holidays in rural areas by marital status group			
	F1	**F2**	**F3**	**F4**
Chi-Square	5.63	4.48	12.22	2.44
df	4			
Asymp. Sig.	.229	.344	.016	.656
	Factors influencing the popularity of walking holidays in rural areas by offspring count group			
	F1	**F2**	**F3**	**F4**
Chi-Square	2.11	4.88	1.79	1.29
df	3			
Asymp. Sig.	.550	.180	.618	.733
	Factors influencing the popularity of walking holidays in rural areas by education group			
	F1	**F2**	**F3**	**F4**
Chi-Square	9.38	14.96	6.36	11.19
df	4			
Asymp. Sig.	.052	.005	.174	.025
	Factors influencing the popularity of walking holidays in rural areas by employment status group			
	F1	**F2**	**F3**	**F4**
Chi-Square	10.02	7.28	20.93	3.58
df	5			
Asymp. Sig.	.075	.020	.001	.611
	Factors influencing the popularity of walking holidays in rural areas by yearly individual expenditure on tourist trips and holidays group			
	F1	**F2**	**F3**	**F4**
Chi-Square	4.61	.86	1.97	3.14
df	2			
Asymp. Sig.	.100	.649	.373	.208

Source: Author's calculations

Implementing the Kruskal-Wallis H Test, the following factors had statistically significant differences:

- F1 between the classification factor *age* (≤25, n=82, 26-35 n=54, 36-45 n=119, 46-55 n=128, ≥56 n=84), c^2 (4, n=467)=13.73, p=0.008, Md=1; regarding the mean values of group ranks, F1 was at the highest level in the 26-35 and 36-45 *age groups*, and the lowest level in the other *age groups*.
- F3 between the classification factor *age* (≤25, n=82, 26-35 n=54, 36-45 n=119, 46-55 n=128, ≥56 n=84), c^2 (4, n=467)=20.16, p=0.009, Md=1; regarding the mean values of group ranks, F3 was at the highest level in the ≤25 *age group*, and the lowest level in the other *age groups*.

Among the popularization factors of walking holidays in rural areas, the youngest age group (up to 25 years) most prefer the organization of traditional sports events. Generation Z, in addition to a limited travel budget, escapes from everyday life by traveling (Akgiş İlhan et al., 2023). Young tourists are attracted by cultural, historical, and architectural features, as well as traditional cuisine, choosing transport they have not used before (Akgiş İlhan et al., 2023). The younger age group (26-35 years) and the middle age group (36-45 years old) prefer voucher systems for countryside walking tours**.** Based on the results of the Kruskal-Wallis H Test, hypothesis H3 was confirmed.

- F3 between the classification factor *marital status* (single, n=125; cohabitation, n=61; married, n=238; divorced, n=29; widow/widower, n=14), c^2 (4, n=467)=12.22, p=0.016, Md=0; regarding the mean values of group ranks, F3 was at the same level in all *marital status groups*.

Among the popularization factors of walking holidays in rural areas, all marital status groups prefer the organization of traditional sports events**.** Based on the results of the Kruskal-Wallis H Test, hypothesis H4 was confirmed.

- F2 between the classification factor *educational attainment* (without formal education, n=2; primary education, n=3; secondary education, n=92; college, n=60; university, n=310), c^2 (4, n=467)=14.96, p=0.005, Md=1; regarding the mean values of group ranks, F2 was at the highest level in the primary education group, and the lowest level in other education groups.
- F4 between the classification factor *educational attainment* (without formal education, n=2; primary education, n=3; secondary education, n=92; college, n=60; university, n=310), c^2 (4, n=467)=11.19, p=0.025, Md=1; regarding the mean values of group

ranks, F4 was at the highest level in the secondary, college, and university *educational attainment* groups, and the lowest level in other *educational attainment* groups.

Among the popularization factors of walking holidays in rural areas, the primary *educational attainment* group prefers the introduction of countryside walking competitions**,** while the secondary, college, and university *educational attainment* groups prefer the promotion of countryside walking tours at the world's leading tourism fairs, and travel portals and blogs**.** Based on the results of the Kruskal-Wallis H Test, hypothesis H5 was confirmed.

- F2 between the classification factor *employment status* (student, n=71; unemployed, n=30; self-employed, n=46; employed, n=280; retired, n=30; other, n=10), c^2 (5, n=467)=7.28, p=0.020, Md=0; regarding the mean values of group ranks, F2 was at the same level in all employment status groups.
- F3 between the classification factor *employment status* (student, n=71; unemployed, n=30; self-employed, n=46; employed, n=280; retired, n=30; other, n=10), c^2 (5, n=467)=20.93, p=0.001, Md=1; regarding the mean values of group ranks, F3 was at the highest level in the student employment status group, and the lowest level in other employment status groups.

Among the popularization factors of walking holidays in rural areas, the student prefers the organization of traditional sports events**,** while all employment status groups prefer the introduction of countryside walking competitions**.** Based on the results of the Kruskal-Wallis H Test, hypothesis H6 was confirmed.

Key discussion points include the importance of promotion, demographic influences, and motivators. Global promotion via fairs, portals, and blogs is crucial. Gender shows no significant impact, while middle-aged groups favour vouchers, and younger ones prefer sports events. Traditional sports appeal broadly, and competitive activities attract diverse respondents.

CONCLUSION

A walking holiday serves as a catalyst for fostering local socio-economic development through tourism. To improve the development of rural tourism, in strategic planning documents (strategies, plans, and programs) as a basis for the realization of the concept of good management of local community resources, it is necessary to pay special attention to the popularization of walking holidays in rural areas. Promotional activities of countryside walking tours at the leading world tourism fairs, tourist portals, and blogs represent the crucial activities of popularizing walking holidays in rural areas, and in connection with that, they should be foreseen in the strategic planning documents of the rural areas. The popularization of countryside walking holidays is equally important for both women and men, so there is no need to undertake special strategies "tailored" for gender affiliation. Bearing in mind that the middle-aged population is most interested in using vouchers for countryside walking tours, it is necessary to plan and budget for the establishment of a system of vouchers for countryside walking tours and thereby contribute to the success of the popularization of rural walking holidays programs as an integral part of the strategic planning documents.

People, regardless of marital status, would be motivated to participate in traditional sports events, and their inclusion in strategic planning documents would be important for the popularization of rural walking holidays and overall rural tourism development. Educated people are left with the strongest impression by the promotions of walking tours at the world's leading tourism fairs, tourist portals, and blogs, so these activities should be foreseen in strategic planning documents. Students are motivated by organizing traditional sports events in rural areas, and for this target group, the program for the promotion of rural walking tours should include the organization of traditional sports events. The impression of the event triggers commitment to the event, but not loyalty to the destination (Kusumah, 2023), which indicates that in addition to the popularization of rural walking holidays by introducing traditional sports events, it is necessary to manage the tourist destination efficiently and effectively. Regardless of employment status, people are attracted to competitive activities in the field of rural walking, so they should be included in strategic planning documents. The findings of this study should not be generalized to demographically different environments, but future research should focus on additional, area-specific factors that influence the popularization of rural walking holidays.

Key conclusions emphasize integrating walking tourism into rural development strategies, tailoring promotional activities to diverse target groups, and leveraging walking to boost local socio-economic growth while preserving cultural and natural heritage. Future research should explore local factors to enhance walking tourism's appeal.

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THE CONTEMPORARY CONCEPT OF PROTECTED AREAS AS A SPECIAL FORM OF SOCIAL INNOVATION

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Abstract

Protected areas (PAs), key elements in environmental policy, have undergone significant evolution in terms of spatial scope and conceptual approach. The traditional model of isolated, centrally managed conservation "islands" has shifted towards more complex structures integrated with socio-economic systems and ecological networks. Modern protected areas (new protected areas – NPAs) integrate nature conservation with social, cultural, and economic priorities, relying on the active participation of local communities, businesses, and other stakeholders. Operating at a local level, they contribute to global sustainability goals. These changes reveal a new field of research and justify defining the contemporary concept of PAs as a particular form of social innovation (SI), adopted as the main objective of the article. The analysis follows two concurrent lines: (1) "organization – social institution – social innovation", exploring the evolution of the NPA model, and (2) "invention – innovation – social innovation", placing NPAs in the research tradition of innovativeness. This combined perspective enables a chronological and logical explanation of the NPA model, offering new diagnostic possibilities for PAs. The methodology includes a theoretical discussion that integrates literature review with conceptual work, using SI as an explanatory tool (explanans) to understand its diagnostic value in the context of PAs. Consequently, SI serves as an analytical category for NPAs, enabling a multifaceted diagnosis and a tool to determine both the boundary conditions for the legitimacy of NPAs and the chances of dissemination of the model. As such, SI draws a line of transposition between the two extreme models: the "Ark" Park and the "Hub" Park.

Keywords: social innovation, protected areas, national parks, sustainable development, social institution, social-ecological systems)

INTRODUCTION

A natural protected area (PA) is a concept that can be approached from various perspectives, not only natural, but also managerial, organizational, social, cultural, and even philosophical and ethical. The multitude of possible approaches demonstrates both the vast thematic scope of the concept and the need to undertake interdisciplinary research for its better understanding. PAs are characterized not only by their developed and diverse functionality, but also, and perhaps most importantly, they are structures subject to various transformations. In global terms, the evolution of the concept of PAs is seen as a shift from a model of "islands" (enclaves) of nature conservation, to areas viewed as elements of ecological networks, functionally linked to socio-economic systems (Jungmeier, 2014; Mose & Weixlbaumer, 2016; Palomo et al., 2014;

Phillips, 2003; Zawilińska 2025). This new perspective takes into account not only the interconnectedness, but also the complexity and variability of natural and socio-economic systems. The integration of the natural, social and economic spheres, and the combination of environmental protection goals with social (including cultural) and economic development is of key importance. The role of PAs is assessed both from a local perspective and in terms of achieving global goals, in particular the Sustainable Development Goals (Becken & Job, 2014; Dudley et al., 2010, 2022; Lopoukhine et al., 2012; Rodríguez-Rodríguez, 2012; Watson et al., 2014). These changes affect all aspects of the operation of protected areas, leading to the search for new goals, management methods and solutions. Broad public involvement is crucial in these processes. The above-mentioned changes also justify viewing the contemporary concept of PAs as social innovation (SI) and treating their history as a process of transformation from an organization to a social institution.

PURPOSE AND METHOD OF ANALYSIS

The purpose of this article is to define the contemporary concept of PA as social innovation. Consequently, the main objective of the analysis is to investigate the model in terms of the possibility of improving its structure and application potential. As a consequence, the titular concept of social innovation becomes a method of diagnosis rather than just an issue to be explored.

This analysis will be conducted in a well-defined conceptual grid, composed of the following terms (Fig. 1): innovation, organization, institution and social innovation, and diffusion of innovations. The concepts indicated herein will form two concurrent lines of analysis:

1: organization – social institution – social innovation

2: invention – innovation – social innovation

The former line of analysis demonstrates the linkages and "extraction" of the new PA (NPA) model from previous solutions used in national parks (NP)[1], aimed at forming a social order (social organization and institution). The second line helps integrate the NPA concept with innovation and its research tradition. Combined, the two lines of analysis lead to an explanation

[1] According to the IUCN definition, a protected area is "a clearly defined geographical space, recognised, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values". A national park is one of the categories of protected areas (category II) and is defined as "large natural or near-natural areas set aside to protect large-scale ecological processes, along with the complement of species and ecosystems characteristic of the area, which also provide a foundation for environmentally and culturally compatible spiritual, scientific, educational, recreational and visitor opportunities" (Dudley, 2008).

of NPAs in chronological and logical order, revealing new diagnostic possibilities for protected areas.

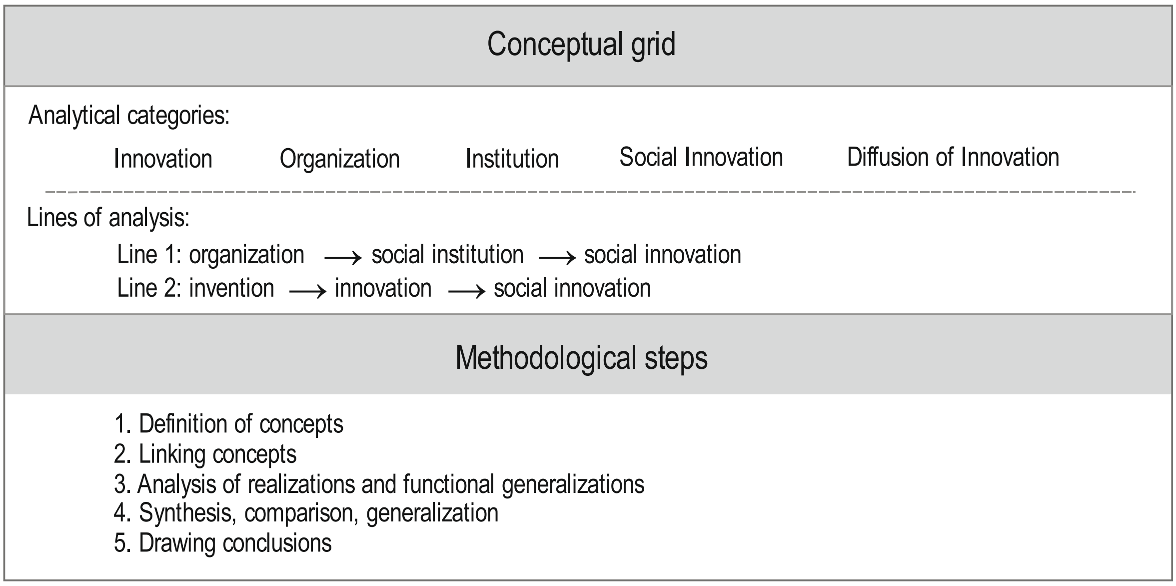
These lines constitute the structural framework of the entire analysis and determine the overall organization of the manuscript. The manuscript comprises several interconnected sections. The methodological section outlines the principles of reasoning, followed by a review of the research tradition on innovation. The literature review not only identifies specific innovations but, more importantly, focuses on a particular type of innovation – social innovations – which form the subject of further analysis. The subsequent section examines the construction of a national park, which can ultimately be interpreted as a social innovation.

The method of analysis comprises a discussion of categories and concepts supported by reference to their respective research traditions. Through this approach, the article combines literature review with conceptual work. To mention only the most important studies, one can refer to the works of Cajaiba-Santana (2014), Seyfang and Smith (2007), and Mulgan, Tucker, Ali, and Sanders (2007).

The SI category can consequently be learned as a diagnostic tool (explanans), rather than the object of diagnosis (explanandum), which is also linked with the usefulness of the term applied. The method of analysis follows the scheme: analysis – synthesis – comparison – generalization. The next steps include: defining the various concepts and terms (including social innovation, protected area, national park), indicating their relations, and the variety of implementations and functional generalizations. The analysis was based on a thought process, typical of conceptual research, systematized through:

1. Rationale: initial claims, taking the following wording:
   - 1.1 The portrayal of the NPA as SI is well-grounded in the research tradition of innovation
   - 1.2 The reference to the concept of SI has diagnostic value, making SI an auxiliary category to the NPA and determining its potential.
2. Conclusions: formulated in the final stage using the deductive method. The process involves the formulation (by logical consequence) of new theses based on primary findings accepted as true. The method applied justifies a reference to the rich tradition of innovation research, allowing the formulation of general regularities regarding the diagnosis of NPA as SI.

Figure 1 Analytical framework



Source: Author's own elaboration.

The analysis is grounded in a comprehensive body of literature, encompassing both theoretical and empirical studies. This literature reflects a long-standing tradition of innovation research, with the earliest sources dating back to the early 20th century, primarily from anthropological studies, and the most recent drawn from contemporary publications. Given the interdisciplinary nature of the topic, the analysis engages with scholars from various fields, including sociology, geography, and management, from both Europe and the United States. Collectively, these studies examine the construction, emphasis, and dissemination of innovations across nearly every continent.

INVENTION AND INNOVATION: RESEARCH TRADITION AND BASIC MEANING OF THE CONCEPTS

The research tradition of innovation is old, rich, and as such integrates the output of: anthropologists (Barnett, 1953; Czarnowski, 1956; Kroeber, 1937; Linton, 1936; Wissler, 1923), sociologists (Coleman et al., 1966; Griliches, 1957; Hoffer, 1942; Jones, 1967; Kollmorgen, 1941; Lionberger, 1952; Ogburn, 1922, 1946, 1950, 1964; Ryan & Gross, 1943; Sheppard, 1960; Tarde, 1895; Wilkening, 1950; Willson, 1927), geographers (Hägerstrand, 1952; Męczyński, 2007), economists (Schumpeter, 2021), specialists in communication and management (Bass, 1969; Boswijk & Franses, 2005; Deutschmann & Fals Borda, 1962; Rogers, 1983; Rogers & Kincaid, 1981; Shannon & Weaver, 1949; Stremersch, 2008; van den Bulte, 2000; Venkatesan et al., 2004; Wuyts et al., 2004). The very term "innovation" means a new thing, a novelty, or even a reform. The literature on the subject differentiates this term, as a rule, from invention, the meaning of which is narrowed down to the creation of new solutions. Innovation is invention applied. The scientific discourse around innovation encompasses different schools and research approaches. In principle, however, one can point to three paths of explanation: the first derived from social anthropology (which views innovation in terms of its ability to disrupt the social order and the cognitive efforts of the individual); the second derived from growth theory (which exposes the importance of innovation in the economy and entrepreneurship); and the third associated with technological determinism (which embeds innovation in the role of a tool that causes social change) (Zdun, 2016). As far as diagnosing the structure of innovation is concerned, the first of these approaches seems to be the most relevant. In an anthropological perspective, innovation means a previously unknown solution that can cause a disruption in a social system. The anthropological approach has its roots in research conducted in the early 20th century among primitive societies.

Innovation, as presented by anthropologists, is structured as a hybrid. It is a combination of the tame and safe and of the foreign and demanding attention. Innovation (defined at this level of generality) is created through the mechanism of subsidizing an underperforming component: in the old solution, only a part of it – usually the least efficient – is replaced, and a better-functioning component appears in its place. This solution is useful, but unknown, and as such raises concerns (Barnett, 1953).

A key structural feature of an innovation is its compatibility, i.e., its ability to blend with the existing environment. Numerous studies document that the emergence of novum imposes far-reaching adaptations in the social system. Barnett (1953), followed by Rogers (1983) and Merton (1949) conclude that innovation is usually the hope of the contesters and the curse of the guardians of the old order. At the same time, the extensive scientific output of the divisionists proves the co-occurrence of forms of cognitive and axiological legitimization of the novum, which means that the acceptance, implementation and potential diffusion of the innovation is determined not only by the utility of the innovative solution, but also by its compatibility with the prevailing system of values. Rogers (1983) also mentions in this context three types of innovation compatibility: with cultural values, with the previous solution, and with needs.

Pioneering studies on innovation (its structure and mode of dissemination) make it possible to identify its three important specific features. Innovation is:

1) the object of cognition with a hybrid construction, combining a known and unknown element (Barnett, 1953)

2) a solution with the potential to cause disruption, “creative turbulence” in the social and economic system (Linton, 1936; Rogers, 1983; Schumpeter, 1960; Wellin, 1955)
3) a solution subject to dual legitimacy: cognitive (by defining its utility) and axiological (by evaluating the degree of compatibility with applicable norms and values) (Barnett, 1953; Rogers, 1983).

SOCIAL INNOVATION AS A SPECIAL TYPE OF INNOVATION

Innovation, like many other scientific concepts, shows susceptibility to typological qualification. Typologies are never limited by the multitude of varieties of a phenomenon, but rather by the applied criteria. Innovation is very similar in this respect. The literature on the subject enables identification of many types of innovations, and their distinction is facilitated by the criteria of: purpose and area of destination (Janasz & Kozioł, 2007), the complexity of the acceptance process (Pietrasiński, 1971), the level of originality, novelty (Pomykalski, 1997), or revolutionary nature of the implied changes (Abernathy & Clark, 1985). We can also speak of mixed types, e.g., occurring in some sphere of interaction, and at the same time characterized by a certain degree of revolutionariness. Social innovation seems to be such a type of innovation. On the one hand, social innovation can be applied across various domains, including entrepreneurship, crisis management, social integration, environmental protection, and the improvement of quality of life; on the other hand, it may represent a change that is more or less radical.

It would not be an overstatement to say that every innovative solution (even strictly technical) has its social component. Otherwise, it would have no absorptive capacity and would not be able to blend into the social system. Social innovation is a particular type of innovation, a specific variation of it. As a peculiar type, social innovation is characterized by both relatedness and difference from other innovations. The relatedness is determined by the basic design of the new element, based on the initial hybrid. The difference, in turn, results from defining the term innovation with the adjective “social”.

The “social” character of innovation should be understood in three ways (Zajda, 2022):

1) First, as a structural feature – when “socialization” is associated with the very construction of the innovation. It is social, which means that it is made up of people. It is a “novel institution” in the sense given by Berger and Luckmann (1983). It is also a network of connections between people and the rules that govern these connections. Social innovation is the developed version of a social institution – its structure and order to solve

problems in better ways. In this perspective, the social nature of innovation is primarily due to its interactive nature. Examples of such social innovations include senior support groups, community theater programs, and collaborative homework initiatives.

2) Second, as a functional characteristic – when innovation is understood as a novel solution that demonstrates its functionality in the social sphere. Social innovation should demonstrate its ability to affect the social sphere, and not just be an innovative organizational form. A good example of an innovation that illustrates this feature is the Local Time Bank. This initiative enables community members to offer their skills in exchange for assistance from others, functioning as a system of time-based service exchanges.

3) Third, as a (non-)market feature – when innovation is understood as a way of solving a problem rather than generating profits. As a consequence, innovation is no longer a product (market solution). Instead, it involves the realization of an idea, a non-profit objective, whose analysis exposes the missionary, Promethean nature of the novelty and thus requires the identification of an axiological basis. A good example of an innovation that illustrates this function is Food Sharing Networks, a non-profit initiative that facilitates the distribution of surplus food within local communities.

Social innovation has been playing an increasingly important role in societies that reject industrial approach. This fact is to be linked to the changing economic paradigms (greater importance of human and social capital, knowledge economy and networks) and social axiologies (expressed, among others, in the concept of sustainable development). For this reason, SI has become an important component of the economic policy of the EU (Kwaśnicki, 2015). Pol and Ville (2009) explain the contemporary interest in SI by the growing importance of the quality of life. According to these researchers, the primary goal of SI is to achieve prosperity, and this includes raising the quality of life. The literature on the subject (Haskell et al., 2021) tends to define SI in an even more general way, assigning to the concept certain sets of practices that provide a better way to solve problems. Concurrently, the implementation of SI is fraught with rigor, requiring changes at the level of institutions, practices, social relations and even lifestyles (Haskell et al., 2021). The majority of research findings also define social innovation as a micro-phenomenon that co-creates the process of change (Howaldt & Schwarz, 2021), therefore, such an innovation can constitute the "neuron" of local development (Eichler & Schwarz, 2019).

The increased interest in social innovation is associated with broader, ideological transformations of societies, including the exposure of so-called post-materialist values – democracy, egalitarianism, social inclusion, citizenship. Consequently, the beginning of interest in social innovation has to be dated after the end of the Second World War (Sikandar et al., 2020). According to McGowan et al. (2017), social innovation began to be stimulated by the post-war code of values and the inherent calls of the new era, including those related to social policy, urbanization, the concept of sustainable development, environmental crises, migration, climate change.

Ravazzoli and Valero (2019) integrate the concept of SI with the concept of welfare. In their perspective, SI is a reconfiguration of social practices that, while solving a problem, leads to prosperity at the same time remaining a tool for civic engagement. Baker and Mehmood (2015) in turn relate the concept of SI with the concept of social capital. In this context, the researchers point to the important features of SI, i.e. scale (e.g., the number of people covered by SI), scope and resonance (i.e., how it affects public awareness). The distinguishing feature of SI becomes the fact that SI is "socially consumed" by society and not by the individual, thus also showing an association with well-being as a social category.

SI understood in this way operates on three levels: micro (when it concerns the satisfaction of tangible and intangible human needs – then needs are the force that triggers innovation); meso (affecting relations between individuals or social groups); macro (forming a common identity, shaping relations between civil society and the state). These levels correspond in turn to the areas of: individual initiatives and implementation (micro), disciplines of practice (meso), and finally policies (macro) (Zajda, 2022). This distinction can be illustrated with examples: at the micro level, a neighborhood tree-planting initiative; at the meso level, an environmental education program run by a non-profit organization; and at the macro level, relevant legislation in the field.

The reasons for the emergence of social innovations are primarily needs and crises, and their implementation affects both social and economic development, as well as the local environment and related resources. Going further, Biggs et al. (2010) note that SI is a transformational tool for ecosystem management, and its opportunities are enhanced by: financing system, incubation conditions, opinion leaders, promotion, involvement of social actors, and an open management system.

Bock (2012) identifies three perspectives of SI analysis that reflect the two levels of the already indicated legitimacy of novum: cognitive and axiological. According to the author, SI should be evaluated in terms of: 1) social mechanisms, including an indication of the normative and cultural foundations of SI; 2) social effects, especially social responsibility of SI; 3) the potential for social inclusion.

Social innovation (as a tool modeled not only in managerial, but also in social terms) cannot be completely planned. It is not a product, but a social construct. By the same token, the conditions for the implementation of this novelty derive from the processual and configurational nature of the innovation itself. SI is usually the impetus for deeper change (Bukowski et al., 2012). The emergence of SI and its development is supported by two types of knowledge: explicit and tacit. The former is codified and technically transferable, while the latter comes in the form of know-how, skills and competencies that are not codified (Bukowski et al., 2012). The peculiarity of social innovation is that it includes a relational component (Perinić et al., 2023). As such, it cannot be regarded a novelty that penetrates the social system from the outside and spreads within it, but rather it constitutes the product of social interactions. In this sense, we can also talk about the production of social innovations, not just their acceptance or diffusion.

From a conceptual perspective, innovations can be understood as phenomena that emerge through the process of institutionalization. The process of institutionalization involves the fusion of values and interests, which means that it involves employing a system of values and the corresponding involvement of social actors in the task structure. Created through the process of institutionalization, the structure combines values, people, market principles and political principia, and as a result becomes the base for subsequent transformations. Correspondingly to the above, social innovation is a form of organization, regulation and lifestyle, which is not only the result of institutionalization, but is also constantly influenced by that process (Howaldt & Schwarz, 2021). This means that the diagnosed line of transformation is to become cyclical. Social innovation, by its very nature, cannot be the last link in any transformation: rather, it is constantly subject to change in the innovation – institution – innovation cycle. Social innovation in this perspective can be described as an innovative institution, or an institution in status nascendi – in a state of constant creation.

According to Selznick (1992), to institutionalize means “to inspire with the value of the task at hand”. However, this process does not just mean equipping the organization with an axiological framework, but also involves the exposure of ideological components in the structure of social innovation. In other words, for a social institution, the ideological basis for its creation is not sufficient. Many organizations have such basis. The distinguishing feature of an institution is that it operates based on the value system of the social actors comprising it. In contrast to an institution, an organization is reminiscent of a machine model: it is a structure of formal relations and functionalities; it is also a construct aimed at solving top-down goals. The institution, on the other hand, "is founded on values, moral commitment, loyalty" (Morawski, 2012). These are the elements that make this very type of social order a spur for social innovation and determine subjective inclusion in development.

SOCIAL INNOVATION AND SUSTAINABLE DEVELOPMENT

In effect, the concept of SI can be described as a solution that corresponds to the Sustainable Development Goals (SDGs) (Millard, 2018). Accordingly, SI is applicable in the area of biodiversity. The importance of SI in this sphere is well documented by the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) Report (Ziegler et al., 2022). Concurrently, the report (IPBES) defines SI in three contexts: nature, technology and co-management. The former allows us to address SI as nature-based solutions. In this area, SI aims to protect, manage and restore natural ecosystems, while addressing social challenges. Examples include wetland restoration projects designed to enhance biodiversity and mitigate floods, rewilding initiatives that restore natural habitats, and the creation of urban green infrastructure (such as "green corridors" that improve residents' quality of life). The second context makes it possible to conceptualize SI as local experiments and grassroots activities in which technology is applied according to agroecological principles. Examples include community gardens and urban farming initiatives that combine food security with biodiversity protection, as well as citizen science projects that engage residents in biodiversity monitoring and enable their participation in knowledge development. Finally, the last of these – the governance context – addresses SI as the result of cooperation aimed at dealing with the drivers of biodiversity loss. In this context, SI can be exemplified by participatory management in protected areas (including co-management schemes in UNESCO biosphere reserves), or collaborative partnerships among NGOs, local authorities, and landowners, jointly safeguarding specified areas or endangered species.

The analysis of the research interest in SI in the context of its application to the field of sustainable development, biodiversity conservation, and related fields allows for the identification of three distinct periods that trace the evolution of this concept. Each phase is characterized by specific keywords reflecting the dominant research themes of the time. According to Vatananan-Thesenvitz et al. (2019), these periods are as follows:

- 1985–2005 (keywords: industrial ecology, sustainable cities, and city planning);

- 2005–2012 (keywords: environmental management, cleaner production, competitiveness, corporate social responsibility, and eco-efficiency);
- 2012–2018 (keywords: Sustainable Development Goals, eco-innovation, social innovation, CSR, and entrepreneurship);

These periods reveal a thematic shift from technical issues, through economic and managerial perspectives, towards the growing incorporation of social dimensions, reflecting the gradual integration of environmental, social, and economic aspects of innovation for sustainable development. Since 2018, research has increasingly focused on climate change adaptation, resilience, the circular economy, and the role of social innovation in advancing the SDGs (Popescu et al., 2022; UNECE, 2023; Howaldt et al., 2024; Carreño-Ortiz et al., 2025).
It should be noted that a marked increase in interest in SI topics in general had not been noted until 2010. More than 50% of the research in this area was published after 2016, and 9% of all publications deal with the natural environment (Sikandar et al., 2020).

At the same time, an analysis of the academic output attributes the greatest interest to several countries: United Kingdom, China, the United States, the Netherlands and Germany (Leal Filho et al., 2022). In the analyses conducted so far, several primary categories of analysis can be identified, such as participation, problem solving, social impact, social teaching and learning, involvement, and the balance of theory and practice.

The importance of SI in conservation and sustainable management efforts has been demonstrated by numerous studies, including those conducted by Haskell et al. (2021). The starting point in this diagnosis is a statement concerning the inadequacy of technological and economic solutions to overcome environmental crises. According to the cited authors, social innovations is an effective tool for change, since, while rooting their functionality, they become an effective counterbalance to technological and economic solutions that do not guarantee the implementation of deep changes which could reach the level of social practices, system of norms and values. Baker and Mehmood (2015) note that SI-based values have another important feature: they produce results primarily at a level beyond the individual. Their effectiveness, relevance and other attributes are "consumed" at the social level and, for this reason, they naturally blend in with the local community and ecosystem. At the same time, in their view, SI is capable of modeling the ecological characteristics of a place by influencing it, rather than merely functioning within it.

Specific applications of SI in the area of biodiversity have become the subject of diagnosis by (Biggs et al., 2010). They analyzed Kristianstads Vattenrike – an area of wetlands downstream of Helgeå in southern Sweden, where a UNESCO biosphere reserve has been established. These wetlands are a valuable ecosystem. Other areas chosen were the Sabie River in Africa (in Kruger National Park) and Yahara Lakes in Wisconsin, US. In each of the cases analyzed, SI revealed great transformative potential. Importantly, SI is also highlighted in the SI-DRIVE (2017) report, which argues that SI counteracts short-term strategies, profit maximization and deficits in thinking in terms of long time horizons. The analyses performed also demonstrate that the natural locus of SI is the local world, and concrete examples of its application included, inter alia, initiatives to reduce food waste, the development of urban beekeeping, urban gardens, the sharing economy, environmental efforts by non-profit organizations, among others. For this reason, SI is analyzed in the context of the possibility of supporting it with public policies. Although it will materialize in the local world, it does not exist in isolation from external conditions. And in this context, it requires thorough diagnosis. Concurrently, while making demands for support, SI participates in developing new public policies. Whitfield (1975 after: Leal Filho et al. 2022) claims that the result of SI has to be evaluated in terms of both the scale and depth of the impacts, and its functionality is never reduced to a single application, but involves a whole series of activities. Therefore, SI displays its usefulness in the field of nature conservation. Moulaert et al. (2013) argue that SI sets a new dimension of management in naturally valuable areas, based on coordination of collective action and provision of social services. Based on research conducted in Costa Rica at the Juan Castro Blanco National Water Park, Castro-Arce et al. (2019) conclude that SI requires a tailored management system, wherein its structure can also be described as an interesting combination of public, private and social mechanisms. The use of SI in protected areas is described in the context of social-ecological systems (SES) management. Such an approach implies the adoption of a perspective in which society becomes closely linked to nature: protected areas become a social creation established for the benefit of present and future generations. The SES model can consequently be characterized as governance that is: adaptive (flexible and following change); participatory (requiring the involvement of various actors: the state, organizations, local communities); pluralistic (based on a diversity of values); conciliatory (aimed at resolving conflicts).

In relation to the SES model (Moulaert et al., 2013), SI can additionally be described as a tool for social transformation, combining: 1) satisfaction of the needs and interests of actors; 2) changes in socio-political systems; 3) empowerment of actors participating in the implied SI change (Moulaert et al., 2013).

The discussed conceptual relationships between SI and sustainable development are further systematized in Table 1, which outlines the main features of SI, its correspondence with the SDGs, and illustrative examples.

Table 1 Social Innovation and Sustainable Development Goals

Features of Social Innovation	Links to Sustainable Development Goals (SDGs)	Examples / Indicators
Social functionality	Improving quality of life, health and well-being, decent work and economic growth (SDGs 1, 3, 8)	Initiatives to reduce food waste, urban beekeeping, community gardens, sharing economy projects, pro-environmental activities undertaken by non-profit organizations
Novelty / social change	Innovative environmental and social solutions (SDGs 9, 11)	Establishment of nature reserves, local initiatives in protected areas, new models of environmental protection and spatial management
Social participation	Strengthening social capital, equality, active civic engagement (SDGs 10, 16)	Community participation in projects, residents' co-decision-making, involvement of social actors and local institutions
Capacity for diffusion (scalability)	Potential for implementation in other communities, responsible consumption and production (SDGs 8, 12)	Scaling up good practices in public policies and governance systems, educational programs, initiatives replicated across regions

Source: Author's own elaboration.

THE ORIGINAL CONCEPT OF THE PROTECTED AREA AS A FOREGROUND FOR SOCIAL INNOVATION

At this stage, the analysis of the concept of PA will be presented chronologically, showing the development of social innovation along the axis of succession: organization – institution – innovation. In this context, the original concepts of nature reserves and national parks do not meet the rigorous criteria of SI, but rather play the role of its foreground. From the perspective of the institutionalization process, national parks and later forms of area-based conservation with a more lenient regime (e.g., natural, landscape, and regional parks), should be viewed as organizations capable of becoming institutions (these areas will be referred to briefly as parks in the remainder of this paper).

In the case of PAs, the base organization for the formation of social innovation is the historical concept of NPs. Following the model hatched in the US, where the world's first Yellowstone NP was established in 1872, the park was to be state-owned and included vast areas of naturally valuable land excluded from settlement and economic use. It was created mainly for idealistic but also utilitarian purposes, as it delimited areas designated for the development of commercial tourism (Keiter, 2013; Mulder & Coppolillo, 2005; Sellars, 1997). The axiology underlying these goals also served as an ideological justification, but it did not derive from the beliefs of the social actors (and certainly not the local actors excluded and displaced from the parks), who, based on their professed ideas, would call into existence a specific organization (Colchester, 2003; Hess, 2001; Phillips, 2003, 2004; Spence, 1999). At this stage, social actors acted more as functionaries carrying out statutory tasks, while NP itself can be described as a technical organization. Naturally, even at this stage, social actors were capable of performing the tasks entrusted to them with far-reaching conviction; nevertheless, the NP formula implies, first of all, the implementation of statutory orders, while also responding to current social and economic changes. Some of these were the result of rapid territorial expansions on US western lands, combined with rapid industrialization and the over-exploitation of natural resources. Under these conditions, NP constituted a protective formula. It became a kind of rigor, the rule of which is supplemented over time by the concept of public space, which resonated with increasingly stronger power throughout the 19th century. NP was supposed to be an area of rigor on the one hand, and a public space whose use was also governed by certain rules, on the other (Jones, 2012; Keiter, 2013).

As a public space, NP was supposed to perform important social functions, including promoting respect for the beauty of nature, serving the development of culture and education, as well as the propagation of physical culture and sports. At the same time, the area of NP was intended to be a meeting place for various social classes. The formation of the original concept of NP was very strongly influenced by the development of tourism, which, with the discovery of the category of "leisure time", became an increasingly important economic sector and area of social activity. For this purpose, the US Congress exempted the land from settlement and private ownership by determining that it was "a public park or pleasuring-ground for the benefit and enjoyment of the people" (OFR, 1872). In order to manage NPs, they soon began to compose their respective organizational structures, establishing National Park Service in 1916. The mission of this authority was to preserve the landscape (scenery), natural and historical sites and wildlife, while making these areas accessible in such a way as to pass them on intact to future generations (OFR, 1916). Consequently, the organizational purpose of NPs expanded. In this formula, NP primarily meets the criteria of a formal organization: it has a purpose, regulations, scope of operation and functionaries. The presented stage found its straightforward continuation in the next one – identified by the Keiter (2013) – the stage of NP development. This stage dated from 1916 to the 1960s, a time when NPs, while protecting naturally valuable areas, primarily served recreational functions. Thus, they were primarily intended to be a territory providing a safety valve for industrial societies. For this reason, they were managed as a "national playground system" Keiter (2013), in which protection of living nature and scientific considerations were secondary issues. As a "territory", NP became the subject of logistic investments (providing access to its territory), as well as projects within the boundaries of the parks themselves. Tourist infrastructure (including hotels and swimming pools) was developed and various forms of recreation (e.g. fishing, golf, downhill skiing) were promoted in these areas. Concerned for the comfort of leisure guests, the authorities even decided to interfere with the environments, e.g. processes and species considered harmful (e.g. wolves) were eliminated, and in turn, with an eye to the entertainment aspect of "leisure time", "natural spectacles" were organized, for example, in the form of feeding the bears (Keiter, 2013; Sellars, 1997; Wright, 1999). Such an image was closely linked to the implementation of the NP concept in the structure of a formal organization, in which the entire functionality is dependent on the main purpose. The operation of this structure is determined by law, not by the values that people themselves bring to the organization. The human actors in this arrangement are the functionaries, carrying out the statutory tasks and guidelines of the adopted policy. Significant changes, allowing one to speak of "taking a course" on the institutionalization of NPs can be weighed in the third period identified by Keiter, which occurred during1960s and is associated with a change in the concept of management in US national parks. This is also when management models stared to become scientific in nature. The object of regulation and conservation activities was no longer just the landscape, but also the processes of its change, which involved a significant reduction in human intervention in the environment (Keiter, 2013; Wright, 1999).

The conceptual and terminological appeal of the "national park" has significantly contributed to the global dissemination of this form of nature protection. In Europe, the establishment of national parks began in Sweden in 1909. After World War II, the concept of the national park spread widely across the continent. The American model – based on creating parks in areas free from economic use, intended for the "benefit and enjoyment of the people" – was gradually adapted to European conditions. In this context, the idea evolved to include inhabited and human-transformed landscapes. As a result, the term "national park" came to be applied to designated areas differing in protection objectives, size, ownership structures, and degrees of economic use. The postwar period also saw the emergence of other protected area categories beyond the national park label. In response to the growing number and diversity of such areas, and the lack of clear definitions and naming guidelines, the IUCN began efforts to establish criteria, classification systems, and records of diverse forms of nature protection worldwide. These efforts began with the formulation of a definition of the "national park", specifying its objectives, scope, and regulatory framework, and laying the foundation for a coherent global system of protected areas (IUCN, 1973). In the 1970s, the defined NP construct was supplemented by a classification that included other forms of protected areas (IUCN, 1978). This division, after modifications, still functions today, classifying NPs as category II (Dudley, 2008). Also in the 1970s, the UNESCO Man and Biosphere program initiated the development of yet another conservation concept – biosphere reserves. The same period witnessed a civilizational breakthrough, marked by a paradigmatic shift in the human–nature relationship, conceptualized in sociology as the New Ecological Paradigm (Catton & Dunlap, 1978). In the following decade, the emerging concepts of sustainable development and biodiversity conservation profoundly influenced the understanding of protected areas. This shift was reflected in the fundamental revision of the principles and guidelines governing UNESCO biosphere reserves, which introduced a new operational framework for protected areas (Batisse, 1997; Bridgewater et al., 1996; Hammer, 2016; UNESCO, 1996; Weixlbaumer et al., 2020).

A key element of NPA is the statement that parks cannot be managed as conservation islands, but rather should be subject to regulations appropriate to more complex and internally diverse wholes – ecological and socioeconomic systems. Management of these systems requires broad public participation, in particular the inclusion of local government authorities, local communities, business entities, as well as other stakeholders. The park thus became a social institution. These assumptions, however, were not fulfilled by earlier PAs. The activities of these parks were based on legislation and the axiom of "public space", without penetrating the social fabric. Moreover, earlier models treated the individual spheres: natural, economic and social, as separate, rather than intersecting. Lange and Jungmeier (Jungmeier, 2014; Lange & Jungmeier, 2014) emphasize that first-generation parks were characterized by authoritarian, top-down management, based on traditional administrative structures, with a dominant perspective of natural sciences and no consideration of interdisciplinarity. Mose and Weixlbaumer (2016) refer to this earlier model as "segregationist", which, as opposed to the contemporary "integrationist" model, assumed the existence of a dichotomy: protected area – economy. This approach disregarded the needs of local communities, isolating them from the park's construction. All this means that earlier generation parks can be considered a prelude to the formation of social institution, whose goal becomes the premise for the formation of such an institution, while the trite way of implementation, based on the rigor of obedience and a system of orders and prohibitions, becomes the obstacle.

The park acquires institutional features when segregation is replaced by integration; authoritarianism by participation; and particularism by interdisciplinarity. The NPA construct is formed at this stage, and can be described as the realization of social innovation. The stages of development of the PA concept, indicated by authors analyzing these developments (Keiter, 2013; Lange & Jungmeier, 2014; Mose & Weixlbaumer, 2016; Phillips, 2003), seem at the same time to reflect the successive stages of the development of societies. The early stage of PA development is associated with the formation of industrial societies, while the contemporary period is associated with post-industrialism. Therefore, the axiological assumptions of post-industrialism should be considered as the ideological background of NPAs. Post-industrialism, also referred to as late modernism, however, does not consist of an escalation of the developmental tendencies of an earlier era (i.e., industrialism), but rather is the result of a radicalization of earlier tendencies. Hence, post-industrialism brings completely new proposals, including a change in approaches concerning the place of man in the economy, society and the environment. The result is a shift from a politics of expansion to a politics of responsibility, from a 'game against nature' towards a 'game between persons' (Bell, 1974) and from the implementation of materialist values to a non-materialist axiology that emphasizes the importance of social inclusion, democracy, sustainability and quality of life. Concurrently, breaking down dichotomies and pointing out the necessity of integrating different orders in networks becomes the intellectual tendency of this era. This trend is equally expressed by relationalism, emphasized among other concepts Archer (2000). According to this scholar, the individual is subject to various pressures – social, natural, and practical – but nevertheless remains an essential autonomous being. Therefore, they are capable of defining these orders (Domecka, 2013), rather than merely becoming merged with them. According to these assumptions, social actors are endowed with reflexivity, through which they can pursue goals, articulated in the form of "concerns" and not just profits or benefits. Concerns, as basic manifestations of the will, build relationships between the individual and all orders, and their configuration forms social and personal identity (Domecka, 2013). The two types of identity, however, remain interdependent and "contribute to shaping – and transforming – the social world". Any involvement of social actors is, in effect, a result of the realization of concerns. "We are who we are because of what we care about" (Archer, 2000).

NPA must be evaluated as a model already formed on this principle, and thus meets all the criteria of an institution and then social innovation. In the NPA concept, previously isolated spheres begin to intermingle, complement and cooperate with each other. An inclusive model is being implemented at the management level, which determines the real commitment of social actors, who carry out not only the statutory functions assigned to them, but also the mission they believe in. When describing this model, Pigliacelli and Teofili (2015) use the metaphor of Noah's ark. In their view, the new paradigm of protected areas (giving rise to the formation of SI) corresponds to the transition from "Ark-Park" to "Hub-Park". The former protects nature as an autarkic sphere – isolated from humans and interrelations with the economy. The latter is the center of linkages, breaking rather than perpetuating the dichotomy. Above all, it becomes a field of activity for various stakeholders and social actors. As a result, the park is no longer just a natural territory, but is also a social and economic area, and its management makes use of local initiatives and thus addresses the quality of life of local residents, including solving their current problems. This is also how NP acquires institutional traits, and by engaging in solving local and most current challenges it becomes a social innovation.

The evolution of the protected area concept reflects not only the changing paradigms of conservation policy, but also the broader civilizational and axiological transformations of societies. The transition from industrialism to post-industrialism has redefined the position of humans in relation to nature, economy, and community, transforming the park into an arena of participatory governance and social innovation. In this context, the protected area becomes a laboratory of new social relations, institutional arrangements, and local development models. These processes – spanning from segregation to integration, from hierarchy to participation, and from isolation to cooperation – illustrate the progressive institutional and social transformation of protected areas toward social innovation, as summarized in Table 2.

Table 2 Phases of institutional and social transformation of protected areas toward Social Innovation

Phase	Approximate timeframe	Institutional and social framework
Formative / pre-institutional phase	1870s – 1960s	Emergence of national parks, early development of national systems of protected areas, establishment of national legal and administrative frameworks; focus on nature preservation and scenic values; industrial society, top-down, segregative management model (nature conservation separated from socio-economic issues), exclusion of local communities

Table 2 (continued)

Phase	Approximate timeframe	Institutional and social framework
International conceptualization and institutionalization	1970s–1990s	Emergence of international frameworks (IUCN, UNESCO), categorization of PAs, development of the biosphere reserve concept; shift toward sustainable development and integration of social and economic systems; transition from industrial to post-industrial society; emergence of new public management models with reduced state control and enhanced social participation; integration replaces segregation; participation replaces authoritarianism, and interdisciplinarity replaces sectoral approaches.
Consolidation and operationalization of the new paradigm	2000s–present	Parks act as multi-functional institutions and "hubs" of cooperation, integrating ecological, social, and economic goals; addressing local challenges while contributing to global sustainability, enhancing social well-being and quality of life; post-industrial society context, multi-actor, participatory, place-based governance; institutionalized social innovation

Source: author's own elaboration.

NPA AS SOCIAL INNOVATION

While the first line of analysis identifies the genesis of NPA as SI, the second focuses attention on the final link in the chain of transformation. The diagnosis at this stage is based on the analysis of NPA as a category that meets the definitional rigor of innovation. This means that two stages will be used in this diagnosis. In the first, innovation will be differentiated from invention, and in the second, its structural specifics will be defined. Stage one is thus the verification of the transition from idea to implementation, corresponding to the transposition: invention – innovation. Part of this transition is made evident by the chronology of transformations. It seems crucial to identify the "initiating event" which is responsible for putting the invention into practice, and therefore also for producing the innovation. While it is not easy to unequivocally date the origin of this hybrid, its origins can be dated back to the 1982 Third World Congress on National Parks in Bali, Indonesia. The theme of the congress: "National Parks and Protected Areas in Support of Social and Economic Development" reflected a new way of thinking and provided the impetus for the formation of a novel construct that demolishes previously diagnosed dichotomies and composes them into a coherent whole (IUCN, 1982). The provision expressed in the theme has been translated into the functionality of PAs. The first practical examples of this approach appeared as early as the 1980s, and were largely associated with the development of ecotourism, which promoted the preservation of nature and local cultural heritage, while engaging local communities and providing them with social and economic benefits (Ceballos-Lascuráin, 1996).

The second criterion, concerning the identification of structural features, boils down to demonstrating the hybrid nature typical of social innovation, the potential of the analyzed solution to generate "creative disruption", the requirement for dual legitimacy and functional specifity.

1. The hybrid nature of the construct is to be associated with the sequence of transformations documented in the first line of analysis, which leads to the incorporation of "foreign elements" – economy, local community, local culture – into the concept of PAs. The hybrid thus arises from the breaking of previously functioning dichotomies and is a consequence of the realization of relationality. Parks are not only adopting a network-like construction themselves, but they also begin to cooperate with one another as network structures.
2. Potential to induce change – the implementation of this criterion is determined precisely by the last of the indicated characteristics: the ability to develop within networks. The concept of NPAs implies that a park is not an isolated entity, but develops as part of worldwide networks. This gives it the trait of diffusivity: by functioning in networks, it transforms the world in remote areas. At the same time, networks, as systems of linkages, are not only channels for dissemination of the model, but also provide opportunities for improvement, i.e. exchange of experience and mutual support. This is, naturally, a diagnosis of the potential for change on a global scale. At the local level, the ability to induce transformation, including the introduction of "creative disruption", has to be linked to the social construction, i.e. consisting of people and institutions. By supporting territorial development organizations, the construction of NPAs triggers the process of involvement of social actors and forces the breaking down of barriers between the world of big politics and local issues. This means change in a dual sense. First, the change is about solving specific problems with the use of local initiatives. Second, this change is related to the very activity of social actors, who, by engaging in undertakings, make a shift from passivity and a sense of helplessness in the face of afflicting problems, to a sense of pride in their accomplished endeavors.
3. Dual legitimacy – NPA as SI is subject to dual legitimacy. On the one hand, it becomes a practical solution, as it stimulates local development by integrating socio-economic issues into the park's structure. The concept is based on scientific premises, making it

cognitively legitimate. On the other hand, it constitutes the realization of the mission expressed in the axioms of post-industrialism, which gives it ideological legitimacy.

4. Functional specificity – is primarily associated with relationality, the measure of which is not only the networked structure of the NPA, but also the coexistence of different orders: natural, practical and ideological. At the same time, the functional specificity is also diagnosed by the criteria already cited above:
   4.1 Satisfying social needs and demands – which is accomplished both through the fact of the engagement of social actors and the targeting of specific environmental problems and the cooperation of different spheres. An example is proper tourism management that minimizes negative impacts on the natural environment and limits negative impacts on local communities, while maximizing benefits from tourism for local residents and their fair distribution. This is achieved through the appropriate design of a network of trails and other tourist facilities, the location of entry points, the development of public transportation, the promotion of various forms of tourism, cooperation with local entrepreneurs, the implementation of joint projects and events, and the creation of jobs for local residents.
   4.2 Efficient and effective use of resources – implemented through the exploitation of human and social capital and utilization of a variety of resources, not only natural, but also economic and cultural. Examples include promoting local products (regional foods, handicrafts), organizing events related to local natural and cultural heritage (educational initiatives, festivals, concerts) that attract tourists and integrate the community, supporting local associations, creating local networks, organizing workshops and training for local residents that contribute to the development of their professional potential (especially in areas related to the operation of the park, such as tourist guiding).
   4.3 Improving the quality of life of residents and visitors – for example, by providing recreational areas, access to clean water and clean air, supporting initiatives that integrate residents and strengthen social ties and local identity.
   4.4 Changes in relationships and existing practices – manifested by breaking down barriers between previously isolated areas, moving away from rigid organizational structures to more flexible solutions, in which officials (functionaries) carrying out top-down orders are replaced with the engagement and invention of employees, and the inclusion and cooperation of various stakeholders. An important part of this

change is also the abandonment of an approach based solely on orders and prohibitions, in favor of building public awareness of conservation.

In summary, the identified characteristics demonstrate that NPAs embody a comprehensive transformation of the protected area model, encompassing value systems, institutional arrangements, governance patterns, and social functions. Table 3 summarizes these shifts, showing the evolution from the conventional toward the contemporary concept as a special form of social innovation.

Table 3 Transformation of protected area models: from the conventional to the contemporary concept as a special form of Social Innovation

Core dimensions	Conventional model	Contemporary model (NPA)	Examples of social innovations
Axiological basis	Industrialism: preservation-oriented, resource-centered governance with expansionist logic, hierarchical governance	Post-industrialism / late modernity: value-diverse governance, responsibility, democracy, quality of life, sustainable development, nature as a common good	Participatory governance platforms, citizen science, environmental stewardship programs, policy co-creation initiatives
Institutional dimension	Park as an administrative institution (public space regulated by orders and prohibitions)	Park as a social institution, a hub of ecological, social, and economic linkages	Cooperative networks, cross-sectoral partnerships, circular economy initiatives
Management model	Authoritarian, top-down, based on legal regulations and traditional administrative structures	Participatory, inclusive, co-management with the involvement of stakeholders (particularly local communities)	Local advisory boards, co-management committees, social consultation platforms, participatory planning workshops
Relation with local communities	Residents' needs ignored, residents isolated from park governance	Inclusion of local communities in decision-making and management practices	Environmental education programs, sustainable tourism initiatives, citizen engagement projects, volunteer programs for park maintenance and monitoring
Approach to natural, social, and economic spheres	Segregated, dichotomous: nature – economy – society	Integrative, interconnected spheres, relational approach	Projects combining nature conservation with local development, protected-area-inspired local products, eco-labeled local products
Social functionality	Limited to natural space, no social engagement	Social functions realized, addressing community needs and improving quality of life	Job creation locally, local time banks, community gardens, senior support initiatives, participatory cultural programs

Source: author's own elaboration.

DISCUSSION

The concept of NPA, presented as a social innovation in this article, ultimately leads to the identification of opportunities and threats associated with this concept. A review of the rich, interdisciplinary literature also allows for the identification of limitations inherent to the concept of social innovation. Social innovation, like other forms of social organization, is never realized in an ideal-typical form. This means that the indicated outcomes of social innovation (e.g., the ability to integrate communities, improve quality of life, address local issues within the framework of non-profit organization) are always achieved with a certain "cost intensity," which often does not balance with the results obtained. The social benefits of social innovation (e.g., engaging local communities) appear insufficient if economic effects are lacking. Another significant limitation is the superficiality of social impact—its short-term nature or the inability to expand relational structures among social actors. Assessing quality-of-life effects is also problematic due to the multiplicity of possible indicators.

From a structural perspective, managing a model based simultaneously on participation and institutionally defined objectives is challenging. Therefore, a fundamental threat to social innovation is the lack of translatability between local perspectives and public policy domains. For this reason, a barrier to the development of social innovation is the difficulty of coordinating communication across local and global levels, as well as between social innovation domains (social, economic, environmental, cultural).

Thus, treating NPA (protected area) as a social innovation, the limitations include:

- **difficulty in coordinating different spheres** – integrating multiple domains and stakeholders may lead to conflicts and decision-making challenges.
- **risk of fragmentation** – despite network connections, the lack of a hierarchical structure may result in chaotic actions.
- **dependence on community engagement** – lack of local community involvement may limit effectiveness.
- **quality of social actor engagement** – conflicts of interest or pursuit of private goals may hinder outcomes.
- **challenges in measuring effects** – the multidimensional nature of social and environmental impacts complicates evaluation.

Conversely, the opportunities include:

- **effective integration of different spheres** – natural, social, economic, and cultural.

- **genuine, rather than superficial, social participation** – active engagement of communities in decision-making.
- **ethics of responsibility** – alignment with post-industrial values and sustainable development principles.
- **appropriate participatory and transparent management model** – promoting accountability and collaborative governance.

The NPA understood as a form of social innovation embodies the transition towards an integrated, territorially rooted, and sustainability-oriented model of governance. It operationalizes the theoretical assumptions of endogenous development, emphasizing the activation of local potentials, the strengthening of social capital, and the creation of new institutional arrangements fostering cooperation between nature protection and socio-economic development.

CONCLUSIONS

The concept of PAs has undergone a significant transformation, resulting in the formation of the NPA model. In the context of the new operational paradigm of protected areas, this transformation reflects a shift from sectoral conservation to a territorially integrated and sustainability-oriented approach. According to the new model, PAs are complex and multifunctional structures that integrate nature conservation goals with broader social, cultural and economic development. While functioning at the local level, they pursue global conservation and development goals. They operate on the basis of extensive networks, involving local communities, businesses and other stakeholders in the management and development of these areas. In the new model, protected areas are not seen merely as organizations that protect nature and manage resources, but as social institutions that are dynamic constructs, capable of evolving and adapting to changing conditions. In this view, NPAs can be regarded as social innovations, and parks operating under this model can be seen as social institutions that institutionalize innovation processes and create conditions for their further development.

Based on recommendations from a long tradition of innovation research, the key features of NPAs were analyzed that justify acknowledging the concept as SI. The following characteristics should be emphasized in that respect: hybrid design, potential to induce change, dual legitimacy (cognitive and ideological), and functional specificity, including in particular the pursuit of

social needs and demands, efficient and effective use of resources, improvement of the quality of life of residents and visitors, and changes in relationships and existing practices.
Given the continuous evolution of the NPA concept, the dynamic nature of the structures of parks operating under this model, and the successive SI developing within their framework, it is imperative that these issues be the subject of further empirical research. In the context of the specifics of SI and the theoretical foundations derived from past research on innovation, the following recommendations can be made regarding their key areas:

1. Recognizing the structures of PAs in terms of breaking internal dichotomies, which means identifying the degree of consistency of the "hybrid" in terms of binding together natural, economic, social, cultural aspects
2. Recognizing functionalities for their potential to induce change, which can be measured by solving local problems, improving the quality of life
3. Diagnosis of the level of socialization, which includes determining the extent, forms and characteristics of participation in the structure, barriers to participation and types of social geometry produced
4. Diagnosis of diffusion potential, i.e., assessment of the possibility of transferring specific solutions to another location, which involves determining the degree of networking of the innovation, that is, demonstrating cooperation with other locations of its application
5. Recognizing the foundation for the legitimacy of innovations, both in pragmatic and ideological terms, which boils down to diagnosing the usefulness of solutions and the perception of their mission.

SI should be seen as an important conceptual and analytical framework that facilitates the study and analysis of reality and provides a deeper understanding of the dynamic interactions taking place between communities and the environment. By analyzing these innovations, we became capable of identifying key relationships and mechanisms that affect the effectiveness of conservation and sustainable development activities. From a theoretical perspective on social innovation and territorial governance, the development of coherent analytical frameworks should be considered fundamental to further progress in this field. Such an approach not only contributes to strengthening the conceptual basis of social innovation research, but also provides a foundation for empirical inquiry and informed policymaking in the management of protected areas.

All of this suggests that this article should be treated as a starting point for the development of a research tool for assessing NPA as a social innovation. It seems that NPA as a social innovation should be diagnosed using a standardized tool (survey/in-depth interview), covering the following thematic blocks:

1. Levels of legitimacy: practical and axiological
2. Structural coherence**:** the degree of integration of natural, economic, social, and cultural aspects within a given park (NPA model)
3. Functionality
4. Socialization
5. Potential to induce change
6. Diffusivity

In conclusion, the theoretical model of NPA as a social innovation provides not only a framework for understanding the integrated functioning of protected areas but also a foundation for developing practical instruments of evaluation and participatory management aligned with the paradigm of sustainable, place-based, and endogenous development. It highlights the importance of social inclusion, deliberative participation, and co-responsibility as essential conditions for the effective and equitable management of protected territories. The novelty of this concept lies in the integration of social innovation theory with the territorial governance perspective, resulting in a new analytical framework that links the institutional evolution of protected areas with their social and developmental functions. This approach goes beyond traditional conservation models by redefining protected areas as active, and socially embedded systems of institutions.

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Original scientific paper

SOCIAL MEDIA USE IN HOTEL INDUSTRY. THE CASE OF FACEBOOK USE IN BULGARIA

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Abstract

The aim of this study is to investigate how 4 and 5 star hotels in Bulgaria use the social media Facebook and to what extent they have implemented it in their marketing and sales strategies. Based on a framework of 28 criteria, the Facebook pages of 60 hotels were analyzed. The results report that nowadays almost all hotels have a presence on social networks, but still their function is mainly presentational. Incomplete descriptions, episodic posting, weak interaction with users, and insufficient use of the possibilities of the media in terms of distribution and marketing largely characterize their use. At the same time, large deviations are reported between the results of some of the hotels, which can be taken as an indicator of the wider use of social networks in the future. This article extends the research done in this topic. The framework used in the study is a combination of components based on previous studies and can be useful for future research as well as serve as a tool for hotel managers and marketing professionals.

Keywords: Bulgaria, social media. hotels, Facebook, marketing

INTRODUCTION

The beginning of the 20th century marked the emergence of social networks. Their original idea was to be a platform for connecting people, sharing experiences, and exchanging ideas between them. After their rapid growth, businesses saw huge potential and started implementing them in their operations. Thus, in a very short period, corporate social media profiles have become an essential part of companies' marketing strategies. For the hospitality industry, social media has been of utmost importance since its inception. Sharing photos and videos of trips and stays has proven to be highly inspirational (Bilgihan et al., 2016) and has created new motivation when choosing a destination. Already in 2011, a study by Skyscanner (2011) reported that 52% of Facebook users were inspired to book a trip by friends' pictures posted on social media. Ten years later, this influence not only remains but continues to grow. According to a brand new Statista (2023) study, 75% of travelers were influenced by social media posts. The same study also points to another intriguing result: 48% of respondents travel to destinations to show them on social media. To leverage the strong influence of social media on travel and its undeniable potential for access to an unlimited number of customers, most hotel companies nowadays have at least one profile on different social platforms. But social media presence alone, without strategic management of the corporate profile, does not bring about significant business benefits. To guarantee this, the hotel must follow pre-prepared marketing and sales strategies that correspond to its objectives and implement them systematically in its profile. Various factors, such as a complete description of the hotel, appropriate format of the posts, and impactful content, are essential for increasing the satisfaction and engagement rate of users on social media. Of equal importance for hotels is the inclusion of components that enable direct communication and booking. Posting various achievements and innovations, organizing games, conducting marketing research (surveys), and maintaining a calendar of upcoming events are all activities that contribute to fully exploiting the potential of social media. Despite these opportunities, research to date reports that hotels are still timid, their profiles are mostly presentational, and suffer from low activity in both interacting with consumers and using the medium as a distribution channel for sales.

The aim of this article is to investigate the use of social media in the Bulgarian hospitality industry. The research question is: How do 4- and 5-star hotels in destination Varna manage their own social media accounts and to what extent do they take advantage of the opportunities they provide? The study focuses on the main attributes of hotel profiles, the type and content of publications, as well as the levels of user engagement. On the basis of 28 evaluation criteria from previous studies in science literature, a content analysis of Facebook profiles of 60 hotels was conducted. The paper concludes with an interpretation of the results and valuable information for hotels to improve their marketing strategies.

THEORETICAL BACKGROUND

Social media are online applications and platforms that aim to facilitate interaction and content sharing in an innovative way (Ladhari & Michaud, 2015; Weber, 2009; Ahammad et al., 2024), by enabling real-time interactions with global users (Boyd & Ellison, 2007). According to Dewing (2012), social media are used as reference for many services based on the Internet and cellular services that make the user participate in online exchange, contribute to content, or join community online such as blogs, wikis, social media sites and media sharing site.

Social media presence is essential for hospitality (PR Smith, 2011). Through it, hotels with enhancing its visibility (Belias et al., 2022; Rossidis et al., 2021), can increase company and brand recognition (Fanion, 2011; Malik, 2023; O'Flynn, 2017; Veríssimo & Menezes, 2015), improve the hotel performance (Arusho et al., 2023), hotel sales (Choi et al., 2016; Dimitrios et al., 2023; Hue et al., 2022) and hotel's online reputation (Kim et al., 2015). Social media also has a significant impact on tourist behaviour and attitudes (Han et al., 2025). They enhance customer experience (Veríssimo & Menezes, 2015), influence the preferences and choices of other travellers (Abuhashesh et al., 2019; Ladhari & Michaud, 2015; Khaki & Khan, 2024; Luong & Nguyen, 2025; Veloso et al., 2024; Xiang & Gretzel, 2010; Ye et al., 2011) and lead to increasing customer satisfaction (Kang, 2018).

The biggest social media nowadays with over 3.05 billion monthly active users, is Facebook (Statista, 2024). Founded in 2004 by Mark Zuckerberg, today it is in the marketing portfolio of many companies worldwide. According to Buffer's State of Social annual report (Buffer, 2019), 93.7 percent of businesses use Facebook. In the field of hospitality, the social media Facebook has many applications. It has the capabilities of supporting hotel guests throughout numerious activities, such as inspiration, preliminary information search, comparison, decision making, travel planning, communication, engagement, retrieval of information asweel as post-sharing and recollecting travel experiences (Owoche et al., 2019). This diverse variety of functionalities makes Facebook among the most used social platforms in the hospitality industry (Ferrer-Rosell et al., 2020; Minazzi & Lagrosen, 2013; Moro & Rita, 2018; Sanchez-Casado et al., 2019).

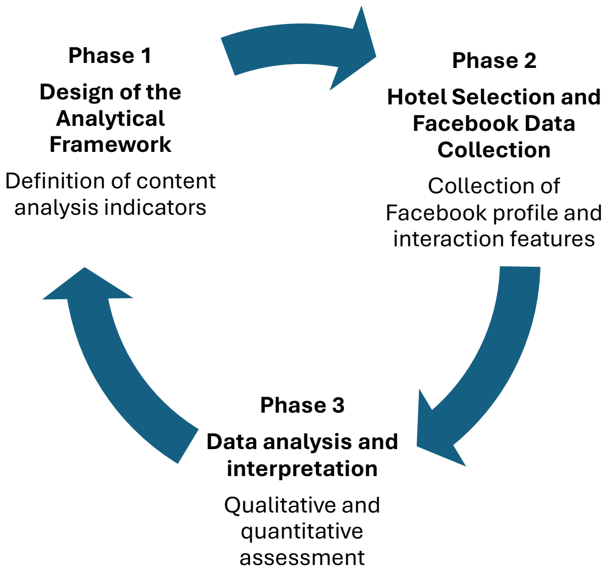
Numerous academic studies have examined how hotel companies manage their social media accounts, primarily Facebook, and the extent to which they have implemented them in their marketing and distribution activities. In most of them, scholars use different, but at the same time similar evaluation criteria based mostly on content analysis. Some of the first studies noted the use of social media in its very early stages of entry into the hospitality industry and predictably noted tentative steps. For example, in 2010, O Connor (2011) examined the Facebook pages of 50 international hotel chains and found that only 28 of them had fan pages. At the same time, a large part of those who have suffered from low levels of visibility, activity and engagement, which, according to the scientist, is a sign of the still ineffective use of Facebook pages by hotel chains. Similar results were reported in a study by Chan & Guillet (2011), which focused on the marketing performance of 67 hotels in Hong Kong on 23 social media sites. Based on 18 criteria, adapted from previous studies, the researchers also found low performance in the social media usage, with some of the main problems being related to the lack of interaction between hotels and customers, inaccurate content and unresponsiveness to guests. Low interaction between hotels and followers was also observed on the Facebook pages of major hotels in Taiwan in a study by Hsu (2012). In it, the author draws attention to another important component, namely the language used in social media. In his study, most of the publications were in Chinese, which according to the scientist, is a barrier to reach a wide range of users. The social profiles of European hotel chains have been studied by researchers Minazzi & Lagrosen (2013). Their results were not significantly different from those of the previous studies. According to researchers, hotels use Facebook to promote the hotel brand, but the potential of customer engagement is still undervalued. As scientists have concluded, hotels are still in the initial phase of developing social media strategies. In the same period, Virginia Phelan et al. (2013) analyzed the Facebook pages of 100 hotels in the United States using 23 criteria divided into three aspects: hotel content features, property information, and interactions between hotels and customers. Some of the results indicated that only 57% of studied Facebook pages were updated on a daily basis, only 17% utilized online surveys to obtain customer feedback, and only 16% have more than 5000 followers. Based on the results of the research, the scientists conclude that hotels still do not fully exploit the possibilities of social media as a marketing tool. Studies conducted a few years later have reported no major improvements. A large-scale study by Denizci Guillet et al., (2016) examined the profiles of 133 hotel brands on top four Chinese social media sites. According to the results, hotels have a low posting frequency, respond selectively to customers, and conduct unilateral interactions with them. The study also focuses on the non-use of social media as a distribution channel for direct sales. Radwan & Radwan (2016) examined the profiles of hotels in Makkah, Saudi Arabia, and the trend of ineffective social media management continues. According to the researcher, the use of media is mainly limited to updating hotel status, promoting hotel products, services and offers and posting blogs, mostly once a month. The results also reported that hotels do not use social media as a channel to book or sell rooms. More recent research reports slightly more, but still insufficient, activity on social media use. In a study by (2019), 64% of hotels in Kenya in the 3 to 5-star category have a Facebook page. The results of the content analysis also show that hotels still do not use their pages effectively, either for branding their hotels or for promoting the services they offer. According to scientists, a significant disadvantage is the low use of videos, although according to their research, it generated the highest number of reactions. Low use of interactive content in the form of videos and non-interactive content in posts was also observed in a study by Aydin (2020), who examined the Facebook pages of 5-star hotels in Turkey. In the researcher's study, despite the luxury star category, 28% of hotels still did not have a Facebook page, and the rest mostly have low post frequencies (42% posted once a month). The Facebook pages of 360 5-star hotels, half located in Greece and half located worldwide, were also examined by Kotzaivazoglou et al. (2021). The results again report that hotels do not take full advantage of social media, which was confirmed, for example, by Pícha et al. (2025). Only a minority of them present their history or mission, have a link to other social sites, and post news about their events, offers, achievements or career opportunities.

After the literature review, we could conclude that hoteliers are slowly recognizing the role of social media in the hotel's marketing and distribution policy. Insufficient interaction with followers, infrequent posting, not customer-oriented content, and very few options for direct bookings are some of the significant shortcomings of social profiles.

DATA AND METHOD

The aim of this study is to investigate how four- and five-star hotels in Varna Municipality use Facebook and the extent to which they have integrated it into their marketing and sales. To achieve this objective, the research methodology was implemented in three consecutive phases, as illustrated in Figure 1.

Figure 1 Research methodology



Source Authors

Phase 1 involves the design of the analytical framework. For the purpose of the present study, content analysis was used. There are two main reasons for this choice. First, content analysis allows for a systematic and objective data collection process that is suitable for exploratory and descriptive research, and enables the identification of current status and trends based on predefined categories in large datasets (Krippendorff, 2004; Virginia Phelan et al., 2013). Second, content analysis is one of the most commonly used methods in studies focusing on social media in the tourism and hospitality sector (Denizci Guillet et al., 2016; Leung, 2012; Owoche et al., 2019).

After reviewing existing research on hotel social media practices (Chan & Guillet, 2011; Denizci Guillet et al., 2016; Kotzaivazoglou et al., 2021; Liang & Law, 2003; Mich & Baggio, 2015; O Connor, 2011; Virginia Phelan et al., 2013), a total of 28 indicators were selected to assess how hotels use Facebook. These indicators are grouped into three main categories: hotel profile, post characteristics, and interaction characteristics.

The first category aims to identify the main attributes of hotel profiles. These include basic indicators such as description, logo, address/map, phone number, calendar of upcoming events etc., as well as online reputation indexes and direct booking options. Publications by type and content are grouped under the second category, referred to as "Post characteristics." The third category covers indicators related to the interaction between hotels and customers, including the number of Facebook followers, posts, shares, and likes.

The complete list of indicators used in the content analysis is presented in Tab. 1.

Table 1 Content analysis form

№	**Criteria**	
	Hotel profile	
1.	Description	yes/no
2.	Logo	yes/no
3.	Instant messaging	yes/no
4.	Calendar of upcoming events	yes/no
5.	Phone number	yes/no
6.	E-mail address	yes/no
7.	Address/map	yes/no
8.	Web site link	yes/no
9.	Reservation button	yes/no
	Online reputation indexes:	
10.	Facebook rating	yes/no
11.	Outdoor rating (Booking.com, Hotel.com…..)	yes/no
12.	Publications activities in surveyed period	yes/no
13.	Marketing surveys	yes/no
	Links to:	
14.	TikTok	yes/no
15.	Instagram	yes/no
16.	YouTube	yes/no
17.	Twitter	yes/no
	Post characteristics	
	Post type:	
18.	Video	yes/no
19.	Picture	yes/no
20.	Audio file	yes/no
	Post content:	
21.	Inventions/ renewals	yes/no
22.	Achievement/ awards	yes/no
23.	Promotion	yes/no
24.	Career opportunities	yes/no

Table 1 (Continued)

	Interaction characteristic	
25.	Number of Facebook followers	numeric
26.	Number of posts	numeric
27.	Number of post shares	numeric
28.	Number of post likes	numeric

Source: prepared by the author

Phase 2 involves the selection of eligible hotels from the National Tourist Register of Bulgaria and the collection of data from their official Facebook pages. This step was carried out based on the indicators defined in the analytical framework established in Phase 1. To define the study sample, a specific geographic focus was first established. For the purposes of this research, four- and five-star hotels located within Varna Municipality were selected. Varna was chosen as the destination due to its popularity as one of Bulgaria's leading seaside resorts.

Information about accommodation facilities was obtained from the National Tourist Register of Bulgaria, which includes all hotels with a valid operating certificate. According to the register, as of August 2023, there were 85 four- and five-star hotels operating within the territory of the destination. To achieve the objectives of the study, several inclusion criteria were applied. First, the hotel must have a Facebook page. Second, the page must be individually managed—not shared with other properties. Third, the page must show evidence of activity within the past year. Applying these criteria resulted in a final sample of 60 hotels, of which 51 are four-star and 9 are five-star.

For the study, the Facebook pages of the hotels and their posts in July 2023 were analyzed. Considering that Varna is a seaside destination with strong seasonality, and that July is one of the most active months for travel, the author of the study believes this is an appropriate period to explore the activity of hoteliers on social media. The data required for the study were manually collected and double-checked during a 48-hour period in August 2023.

Phase 3 involves the analysis and interpretation of the data collected from the Facebook pages of the selected hotels. The study applies a content analysis approach that combines qualitative coding with quantitative measurement.

Each of the 28 indicators was coded according to its nature: binary (yes/no) for the presence or absence of profile and content features, and numeric values for measurable engagement metrics such as number of followers, likes, shares, and posts.

Both qualitative and quantitative data were processed using IBM SPSS Statistics. The binary indicators were summarized using descriptive statistics (frequencies and percentages), enabling the identification of patterns in structural features and post types. The numeric data were used to provide an overview of engagement levels and to support comparisons between hotels in terms of activity and user interaction.

RESULTS

The results of the first group of indicators “Hotel profile” (Tab. 2) report heterogeneous values. One of the most basic components of a hotel’s Facebook page is “Property’s description”. It enables the property to make a first impression (Virginia Phelan et al., 2013) and is extremely important, especially for new customers. In the present study it was posted by only 61.7% of the hotels. The hotel logo was implemented in 78.3% of the profiles and a calendar of upcoming events was adopted from 73.3%. The same percentage of hotels 73.3% (n=44) have posted their Facebook rating on the wall. Only two hotels have published ratings from external booking sources. One of them has posted travellers’ choice awards from Tripadvisor.com, and the other its score from an external platform, in this case, Agoda.com. Only 40% of hotels have implemented a direct booking button, which shows the still weak integration of social media in sales channels. Publication activity is also not particularly strong. Only 61.7% (n=37) reported publishing activity (at least one post) in July. None of the hotels posted a marketing survey in the month of July when Facebook page traffic is expected to be the highest. Strong activity was reported in the ways of contacting the hotel. A link to the hotel's website, e-mail, address/map, and phone number were posted by all 60 hotels in the study. Instant messaging as a quick connection component was also used by all hotels. Links to social networks were low performed on the hotels' Facebook pages. Links to Instagram were indicated by 11.7% of hotels, links to TikTok (1.7%), and links to YouTube (1.7%). None of the hotels has a link to Twitter.

Table 2 Hotel profile

Criteria	Frequency	Percent
Description	37	61.7%
Logo	47	78.3%
Instant messaging	60	100.0%
Calendar of upcoming events	44	73.3%
Phone number	60	100.0%
E-mail address	60	100.0%
Address/map	60	100.0%
Web site link	60	100.0%
Reservation button	24	40.0%
Facebook rating	44	73.3%
Outdoor rating	2	3.3%
Publications activities in surveyed period	37	61.7%
Marketing survey	0	0.0%
Links to TikTok	1	1.7%
Links to Instagram	7	11.7%
Links to YouTube	1	1.7%
Link to Twitter	0	0.0%

Source: prepared by the author

The second group of indicators relates to the type and content of posts published in the study period (July). Only hotels with at least one publication (n=37) per month were included in this part of the study. The results (Tab. 3) report that the main preferred type of posts for 94.6% of the hotels was picture. Video was used by 56.8% of them. Audio file was not used by any hotel. The content of the publications was considered in several categories: promotion, news, inventions/renewals, achievement/awards and career opportunities. Promotions (package deals, discounts) were offered by 54.1% of hotels in July. News was published by 21.6% of the hotels and was mainly related to upcoming cultural events in destination Varna, such as international festivals, exhibitions, culinary events, sports tournaments, etc. Only one, Palm Beach hotel, has made a publication in the achievement/awards category. It was for the "Fashion and Style 2023" award, and was received during the surveyed month. None of the hotels has made a publication in the inventions/renewals category, which could include not only innovations in hotels, such as new services or facilities, but also upgrades to room equipment, restaurant, lobby bar, etc., that are common especially in seasonal hotels. There is also no publication in the career opportunities category.

Table 3 Publication characteristics

Criteria	Frequency	Percent
Post type		
Picture	35	94.6%
Video	21	56.8%
Audio file	0	0.0%
Post content		
Promotion	20	54.1%
News	8	21.6%
Inventions/renewals	0	0.0%
Achievment/awards	1	2.7%
Career opportunities	0	0.0%

Notes: only hotels with at least one post in July are included in the table
Source: prepared by the author

The last part of content analysis includes indicators analyzing the level of engagement (Tab.4). One of the most important of them is the number of Facebook followers. Facebook followers are users who see every single post on a company's page and may comment, like or share it. With a good marketing strategy, they can be an extremely useful source for promoting the hotel and attracting new bookings. According to the results of the study, hotels in the Varna municipality with their own Facebook page have an average of 6177 followers. Their number varies within a wide range from min 131 to max 61000, which explains the high standard deviation of 9241.19. In total, the hotels on the territory of Varna Municipality have 370 071 followers. It should also be noted that the majority of hotels (68.3%) have up to 5000 followers and only 3% exceed 10000. In the present study, the hotel with the most followers (61000) is International Hotel Casino, which offers a casino with 24-hour operation and understandably targets a different market segment.

Table 4 Interaction characteristics

Criteria	N	Minimum	Maximum	Sum	Mean	Std.Deviation
Number of followers	60	131	61000	370071	6176.85	9241.193
Number of posts	37*	1	73	516	13.95	17.871
Number of shares	37*	0	169	915	24.73	38.083
Number of likes	37*	0	2533	16131	435.97	558,810

Notes: *hotels with at least one post in July.
Source: prepared by the author

To measure the average number of posts, publication's shares and publication's likes, we will exclude hotels without a single post in the month of July. The remaining hotels (n=37) have published a total of 516 posts, which amounts to about 14 posts per month. One post received an average of 31.26 likes and 1.77 shares during the study period. It is interesting to note that the hotel with the highest number of posts (hotel Sofia) was not the hotel with the most shares and likes on its posts. The one with the most likes on posts is Argisht Partez with 13,000 followers, although it has relatively few posts. The one with the most shares is Prestige deluxe hotel aquapark club, which may be due to the fact that the hotel posted many promotions during the research period. It should be added that there are also hotels with posts but without a single like or share, which undoubtedly confirms that content is more important for good engagement than quantity.

DISCUSSION

The results of the study indicate that most hotels in Bulgaria have a Facebook page, but they are still not fully utilizing the platform's potential. The inclusion of basic features such as hotel descriptions, messaging tools, and contact details suggests a predominantly presentational and informational approach to social media use. The weak integration of a booking button (present in only 40% of the hotels), compared to other studies (Kotzaivazoglou et al., 2021), shows that social media is not yet viewed as a fully integrated distribution channel. While this may be due to strategic preferences—such as reliance on OTAs, tour operators, or direct website bookings—adding this functionality could increase the volume of direct reservations(Leung, 2012). Another notable gap identified in the study is the lack of use of Facebook for marketing research purposes. One of the most accessible and low-cost tools available on social media is the use of customer surveys, which can provide valuable feedback on guest satisfaction, expectations, and content preferences(Virginia Phelan et al., 2013). Despite this potential, none of the hotels in the sample published any surveys during the observed period. Online reviews from platforms like TripAdvisor and Booking.com are widely acknowledged as a key factor influencing the hotel selection process and enhancing trust and brand credibility (Ladhari & Michaud, 2015, 2015; Ye et al., 2009). Although Facebook provides the option to integrate these ratings, only two of the hotels in the sample have taken advantage of this opportunity. This represents a missed opportunity, especially for hotels with high ratings, which could leverage these external reviews to strengthen their reputation and attract new customers. A substantial proportion of hotels (38.3%) exhibited no publication activity during one of the peak travel months. This finding underscores the inconsistent use of social media, even during periods of high tourism demand. Among the hotels that were active, visual content remains dominant, with image-based posts being the most commonly used format, followed by video. This pattern reflects trends reported in prior studies on hotel social media practices (Aydin, 2020; Kotzaivazoglou et al., 2021; Owoche et al., 2019; Virginia Phelan et al., 2013). In terms of post content, promotional messages—such as discounts and package deals—were the most frequently observed, followed by news updates. However, strategic content types such as announcements of achievements, service innovations, or career opportunities were largely absent. Only one hotel published a post related to an award during the study period. None shared information about recent improvements or new services, and none posted details about job openings. The lack of social media usage for HR research is also confirmed by other studies(Gehrels et al., 2016; Kotzaivazoglou et al., 2021). These categories – especially innovation and HR-related content – can play a key role in strengthening brand positioning, attracting talent, and maintaining competitiveness, particularly during the high season when customer attention is at its peak. The complete lack of such posts suggests that many hotels are not yet leveraging Facebook as a multi-functional communication and engagement tool, but rather rely on it for basic promotional visibility (Kotzaivazoglou et al., et al. 2021; Virginia Phelan et al., 2013). Additionally, another indicator of limited social media performance is the relatively low number of followers per hotel. The average was 6,177 followers, which is modest considering the overall volume of social media users globally (Denizci Guillet et al., 2016). This may reflect insufficient efforts by administrators to grow and engage their audience. Among hotels with at least one post during the study period, the average number of posts in July was 14—roughly consistent with the industry benchmark of 3.36 posts per week (RivalIQ, 2023). Still, the data revealed high variability, with some hotels posting frequently and others only once. On average, a post received 31.26 likes and 1.77 shares, but these numbers varied widely across the sample, with some hotels receiving no engagement at all. This suggests that posting frequency alone is not enough to drive interaction; instead, more attention must be paid to the relevance and appeal of content shared with followers(Nastisin et al., 2024).

CONCLUSION

This study examines the use of Facebook by hoteliers in Bulgaria and analyzes the extent to which they integrate it into their marketing and distribution strategies. In our opinion, this is the first such study that provides valuable information about the current state of social media in the Bulgarian hotel sector.

The results of the study confirmed the conclusions of previous studies, which showed that hotels are still not fully utilizing the potential of Facebook(Chan & Guillet, 2011; Hsu, 2012; Owoche et al., 2019; Radwan & Radwan, 2016; Virginia Phelan et al., 2013).

In order to achieve higher efficiency, managers can take action in several key areas:

- To increase the audience – they should provide quality and diverse content that attracts new followers and generates a high level of engagement with them.
- To reach more direct bookings – hotels should add functionalities that enable direct booking.
- To improve the image – hotels should integrate online ratings and reviews received from external booking platforms
- To improve competitiveness – hotels should share their new features and innovations especially during peak seasons.
- To better understand customers – hotels should use social media to conduct surveys that will provide valuable information about customer preferences and needs.

Paper limitations and future research suggestions

The study has its limitations. One significant limitation is the scope of the survey, which only included hotels from specific star categories. Future research could consider a broader sample, incorporating hotels from different star ratings to provide a more comprehensive overview. Additionally, this study examined social media activity during only a single month, which coincided with peak travel season. To gain a fuller understanding of social media usage, future studies should include data from less busy periods to assess if the trends observed during peak season are consistent throughout the year. The study also included both year-round and seasonal hotels together, but it might be more insightful to treat these two types of establishments separately in future research.

For future research related to the extent of Facebook usage in the hospitality industry, it is good to consider other factors such as the number of rooms and occupancy rate. Additionally, the use of direct and indirect distribution channels and specifically their ratio should also be considered when measuring hoteliers' activity on social media. It is also important to assess consumer perception of the content of hotel Facebook pages and its impact on trust and the intention to make a direct booking. Finally, investigating the perspectives of hoteliers and marketers regarding the barriers and concerns they face in using social media as a marketing and distribution tool would offer valuable insights for future studies.

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Original scientific paper

HOW EXISTENTIAL AUTHENTICITY INFLUENCES FLOW-LIKE EXPERIENCE INVOLVEMENT, SELF-CONGRUITY AND TOURIST EXPERIENCE? SULTANAHMET: A WORLD HERITAGE DESTINATION

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Abstract

Cultural heritage is as vital to the sustainability of tourism as it is to humanity. Therefore, safeguarding heritage destinations within their unique historical and cultural attributes is still a major issue in today's tourism environment. In addition to local and national authorities, tourists have a vital role in the promotion and sustainability of heritage destinations. The unique tourist attractions are an essential aspect that influences the motivation that plays a role in tourists' choice of destination. As tourists search for ways to escape everyday routines, heritage destinations are highly regarded as alternative destinations that offer opportunities for self-actualization and self-discovery. Tourists visiting heritage sites encounter a new spatial and temporal sphere, which gives them a sense of authenticity and genuineness. This experience, which can be a reflection of their true self, allows them to get into the flow. Thus, by immersing in the flow, tourists can have a memorable experience at the destination. The study was conducted in a quantitative research design on 226 international tourists visiting Sultanahmet district of Istanbul, a World Heritage destination. The study aimed to measure the effect of participants' existential authenticity on their flow experience, self-congruity and personal tourist experiences. Results showed that tourists' flow experience, self-congruity and personal tourist experience are significantly and positively affected by their existential authenticity.

Keywords: Existential authenticity, Self-congruity, Flow-like experience involvement, Tourist experience, Sultanahmet

INTRODUCTION

While social media and technology now provide great benefits to travelers, heritage—one of the main sources of tourism—acts as a catalyst for facilitation by using these digital and technological instruments. Modern-day tourist experiences, in its dynamic aspects, has evolved from the past to the present and has taken its current form, and this metamorphosis keeps changing. Supporting this view, Lyth (2006) argues that the rise of the experience paradigm is both the cause and the result of heritage. Lyth emphasizes that heritage should be understood as the contemporary use of history rather than history itself. Accordingly, because heritage presents people with the past in a way adapted to contemporary needs and purposes, it actually fulfills the postmodern passion for the assemblage and consumption of individual experiences in current economic environment.

Typically, tourists can go on vacation to get rid of their routine selves, have fun and spend time with their friends (Shepherd, 2015). However, N. Wang (1999) asserts that tourists are preoccupied with an existential condition of being initialized by tourist activities in search of an existentially authentic tourist experience. To put it another way, existential experience is the ability for visitors to sample subjectively or intersubjectively the authenticity of being as part of the tourism process. Authenticity pertains to certain types of tourism, including those that entail the portrayal of the other or the past, such as history, ethnic and culture tourism.

Individuals who endure the constraints of daily life go beyond their own artificial environments in the destinations visited and experience these places to the extent that match their true selves. Thus, tourists who experience affirmations in their self-discovery, act in a state of flow by the behaviors they exhibit in the destination and the activities they participate in. Such experiences enable the tourists to know themselves and increase their level of awareness. In this respect, heritage destinations have different characteristics from classical destinations and function as a bridge between the past and the present.

This study was conducted in Sultanahmet district of Istanbul/Türkiye, a monumental heritage destination. Istanbul has been home to significant religious, artistic and political events for over two millenia due to its advantageous location on the Bosphorus peninsula between the Black Sea and the Mediterranean, the Balkans and Anatolia (UNESCO, 2023). On the peninsula, there are numerous tourism routes that are set by non-governmental organizations, different institutions, and the local municipality. Furthermore, there are themed tour routes in the vicinity (Tak & Berkmen, 2023). Sultanahmet, as being one of the most popular attraction points of Istanbul hosts Hagia Sofia, Great Palace Mosaics Museum, Yerebatan Cistern, Istanbul Archeological Museum, Topkapı Palace, Istanbul Museum of History of Science and Technology in Islam, Şerefiye Cistern, Sultanahmet Mosque, Hagia Irene Museum, Hippodrome, Obelisk of Theodosius, Walled Obelisk and many other historical masterpieces. Hotels, cafes, restaurants, travel agencies and souvenir shops surround historical Sultanahmet. The area subject to the research is located within the area represented in the UNESCO World Heritage List. Sultanahmet district is a region with high visitor density and located within the borders of the historical peninsula. According to Aykaç (2019), the musealization of Sultanahmet is still an ongoing process in a contemporary context.

Sultanahmet Urban and Archaeological Conservation Area is located on a hill in the east of the Historic Peninsula and involves two different regions: Sultanahmet Region which is a popular tourist attraction point and Sur-i Sultani Region where Topkapı Palace is located. Sultanahmet District has been declared as an Urban Archaeological Site with its influental monuments as well as its residential, commercial and tourism functions. This region is the centre of two great empires and civilisations. Sultanahmet Urban and Archaeological Conservation Area represents a characteristic area within the Historic Peninsula with remarkable historical and cultural value on a national and international scale in terms of the momentous artefacts and ruins it hosts. Sultanahmet Urban and Archaeological Conservation Area is the heritage area with the highest number of registered monuments in Istanbul. There are also a total of 505 examples of civil architecture in the area (Historical Peninsula Management Plan, 2018) The aim of the study was to measure visitors' self-congruity, personal tourist experience, and flow-like experience involvement from the perspective of existential authenticity in the context of heritage tourism. Sultanahmet district was determined as the area where this study was implemented, as it is one of the most popular destinations attracting tourists in Türkiye.

THEORETICAL FRAMEWORK

Existential Authenticity

The promotion of the "unique" is embedded in the tourism industry (Shepherd, 2015). The term authenticity, by its nature, corresponds to ambiguous meanings and is interpreted through two different meanings, especially in the tourism literature. One of them is genuineness of the events or artifacts, and the second, as a human characteristic refers to being true to one's essential nature (Steiner & Reisinger, 2006). 'Authentic' and 'the original' have evolved into catchphrases for a variety of tourist destinations, activities, and establishments that in various ways aim to be true to their origins (Olsen, 2002). Existential thought contrasts between a human consciousness that is focused on the subjective experience and the rational one that organizes and catalogs reality in a logical order, much like the well-known metaphorical division between a left and right hemisphere activity of the brain (Davidov & Russo-Netzer, 2022).

Existentialism, constructivism, and objectivism are the three approaches that have been used to frame authenticity in tourism literature (Zhu, 2012). According to Cong et al. (2022), existential authenticity refers to the inner meanings, thoughts and values ascribed by tourism stakeholders, local culture and tourism businesses in the development of a destination. From the viewpoint of experiences, existential authenticity provides a framework for analyzing the various ways lived experience manifests itself (Rickly-Boyd, 2013). Although the existential perspective is based on the Heideggerian approach, Knudsen et al. (2016) argue that authenticity is a fantasy in essence and dialects with the concept of alienation.

Within the context of heritage tourism, existential authenticity appears as a freedom-oriented and experiential phenomenon (Fu, 2019). According to MacCannell (2013), the core of tourism is the search for authenticity. Supplementarily, Gardiner et al. (2022) claimed that, authenticity is an essential element in order to further expand the understanding of the historical heritage tourism experience and more to the point, existential authenticity is at the core of understanding tourist experience. The contextual content of authenticity is perceived to vary from culture to culture and may vary according to historical, insightful and cultural traditions. For this reason, authenticity will gain a tourist-specific context by understanding different touristic motivations in the context of different tourist groups (Shepherd, 2015; Aydın & Ünüvar, 2021). Since tourists recall their past to identify themselves, heritage tourism is closely related to existential authenticity (Steiner & Reisinger, 2006). In order to determine tourist satisfaction when considering heritage tourism in historic locations, perceived authenticity is one of the crucial factors to be considered (Lu et al., 2015).

Liminal features of the tourist experience may be more unambiguously revealed by existential authenticity. Thus, visitors are liberated from the constraints of daily life and are not influenced by social norms and impositions. This sense of freedom will make it easier for tourists to create new social contexts and will reveal an authentic self. An opportunity to be authentic can arise in this circumstance (H. Kim & Jamal, 2007). Moreover, MacCannell (1973), argues that tourists often intend to visit a destination with the desire to experience authenticity and may think that the destination they actually visit is authentic, but it is difficult to assume whether the experience is truly authentic.

Olsen (2002) annotates existential authenticity as an implicit selling element of the tourism products. Based on the argument of Lacanian psychoanalysts, Knudsen et al. (2016) argued that authenticity is a fantasy in tourism marketing and in the context of tourist experience and motivation. From the perspective of a variable, perceived authenticity can be viewed both as an output/consequence of the tourist experience or as an input/antecedent of tourist behavior (Kolar & Zabkar, 2010). Besides, in existing literature, existential authenticity is typically approached as a one-dimensional construct (Fu, 2019). As reported by the previous research, tourists' perceived image of the destination, emotional experience, cognitive loyalty and satisfaction are influenced by existential authenticity (Chen et al., 2022; L. Li & Li, 2022; W. Lu et al., 2022; Park et al., 2019).

Personal Tourist Experience

Experience plays a major role in tourism. Tourism, which can also be called a hedonic experience, forms the basis for the creation of experiences that are emotion-based and valued for unforgettable moments (Frochot & Batat, 2013). The services and activities a tourist partakes in while on vacation or while away from home can be categorized as "tourist experiences." (Sharpley & Stone, 2010, p. 3). The first definitions of the tourist experience reveal its difference from routine activities in the individual's daily life. While Smith (1989) describes the tourist experience as experiencing change, Cohen (1979) portrays the tourist experience as seeking novelty and strangeness and as a temporality experienced outside of daily activities.

Tourist experiences have altered in parallel with the tourism phenomena, which has undergone multiple evolutions in today's consumption environment. The tourist experience is predominantly abstract and complex. According to Wight (2021), one of the key elements of tourism is experience which is a combination of different episodes in tourist's life cycle. As a process, the tourist experience builds on previous experiences (Vergopoulos, 2016). Besides, the framework for the tourism experience is improved by the co-creation of lived experience (Doyle & Kelliher, 2023). Tourist experience is the sum of the services and experiences provided or produced by the individuals, organizations and businesses that make up the tourism sector. These services and experiences can also be serendipitous and bring satisfaction or benefit to the tourist (Sharpley & Stone, 2010). From another point of view, Otto and Ritchie (1996) define tourist experience as a mental state that participants perceive. In another definition, Pine and Gilmore (1999) define experiences as events that elicit a personal response from people. Frochot and Batat (2013) argued that from the decision-making phase through the post-purchase phase, the experience must be taken into account.

The tourist's experience informs their decision-making during the journey and shapes their post-trip appraisal and behavioral intentions (X. Li et al., 2023). Although tourists can decide which touristic activities they want to participate in before their arrival at a destination, there may be some tourism type preferences that are shaped during their arrival at the destination, or tourists who have not yet decided upon arrival may make a choice guided by the elements in the destination.

The majority of tourist experiences occur in brief episodes (Ritchie & Hudson, 2009). However, the visitor experience is a continuous, circular activity (Sharpley, 2021). From the point of view of marketing, experience in the tourism industry is a real source of destination appeal and enduring competitive advantage (Bernaki & Marso, 2023). In the literature, there are several studies that focus on existential authenticity within the framework of tourism and hospitality (Fu, 2019; Light & Brown, 2020; Steiner & Reisinger, 2006; Wassler & Kirillova, 2019; Yi et al., 2017; Yu et al., 2020).

Flow-Like Experience Involvement

According to Zaichkowsky (1985), involvement is defined as an individual's perception of the object's relevance based on innate needs, values, and interests. Correspondingly, experience involvement is characterized as individual, instantaneous involvement in the consumption of a particular experience (Zatori et al., 2018). From the tourism framework, experience involvement refers to the level of interest in the product and the affective reaction linked to it are equated with involvement (Manfredo, 1989). Experience involvement, an appropriate measurement tool for on-site experiences, is one that best describes real-time experience consumption and creation, given that some experiences are highly inclusive and can trigger emotions (Zatori et al., 2018).

As stated by Rickly-Boyd (2013), it is essential that "place" be taken into account in studies on authenticity and the tourist experience since it is an amalgamation of emotional, social, physical and cultural elements that contribute to the tourism experience. In the context of tourism and leisure, studies on "involvement" have discussed the terms pleasure and interest synonymously (Campos et al., 2017).

Depending on M. Csikszentmihalyi (2014) portrayal, intense experiential immersion in moment-to-moment activities is the defining characteristic of flow. The individuals are operating at their peak performance and focus all of their attention on the task at hand. According to his definition, when the individual is totally immersed in an activity that they are completely unaware of time, exhaustion and everything else but activity itself they are regarded to be in flow. Huang et al. (2023), on the other hand, refer to the flow state as the hedonic aspect of individuals' behavioral intentions and attitudes. According to Nugraha et al. (2021), experience involvement influences both tourist satisfaction and memorable tourism experience.

Mihaly Csikszentmihalyi (1978) argues that subjectively valued experiences require conscious attention to a small field of stimuli. However, people rarely experience the pleasure that accompanies the flow experience because they do not know how to concentrate even under the most favorable psychological conditions. Coffey and Csikszentmihályi (2016) emphasize the balance between the skills of the individual and the challenge of the activity as the first condition of the flow experience. In particular, if difficulties dramatically overmatch the individual's skills, the individual may experience anxiety. Oppositely, if skills surpass challenges, boredom is experienced.

In order to experience flow in tourism, the visitor must exhibit some flow propensity and be motivated to enter the flow state when given the right environmental cues (Da Silva deMatos et al., 2021). Moreover, as Seran et al. (2021) stated, tourist's experience involvement can enhance their intention to recommend the destination to others. According to M. Kim and Thapa (2018) flow experience significantly affects satisfaction.

According to Ghani and Deshpande (1994), the primary aspects of flow are a) total focus in an activity and b) the enjoyment one experiences when engaging in an activity. M Csikszentmihalyi (1990) argues that on rare occasions, flow might happen coincidentally due to a fortunate convergence of internal and external circumstances. Despite the possibility of such occurrences, it is much more likely that flow will be the outcome of a structured activity, a person's capacity to induce flow, or both. Furthermore, Zhang et al. (2019) found that, when visitors exhibit greater levels of cultural identity and innovation, the experience of flow is improved and, authenticity of a cultural tourism destination can strengten the flow experience.

Wu and Liang (2011) concluded that emotions of tourists are positively influenced by their flow experiences and visitors that have a propensity for high internal reward or active participation in tourism-related activities may have a more positive experience. As reported by Zhang et al. (2019), authentic experience is influenced by tourists' flow experience and authenticity is an essential resource of flow.

2.4. Self-Congruity

Self-congruity is essentially based on the concept of self-concept. Self-concept was introduced to the literature by Rosenberg (1979, p. 7) and defined as "the sum of a person's feelings and thoughts in regard to himself as an object". Actual self-image is a component that can reflect consumer self-concept, and consumer self-concept is categorized in four dimensions as ideal, actual, social, and ideal social self-image. The "actual self-image" refers to how consumers see themselves in reality and reflects their personal identity. What consumers would like to become or how they would like to see themselves is the "ideal self-image". Consumers' perceptions of how significant others view them are referred to as their "social self-image". How individuals would like others to evaluate them is referred as ideal social self-image (Sirgy, 2018).

Impacts of having an ideal and actual self-image may vary depending on the type of tourism (M.-H. Li & Lai, 2021). In the same way Sirgy (2018) argues that, the intention to revisit will increase as there is a greater fit between the image of the destination and how the tourists perceive themselves. To illustrate, the likelihood that a tourist will visit a location increases with the degree of congruity between the destination's image and their real and ideal self-concept (Beerli et al., 2007). Furthermore, tourists tend to exhibit more affirming affective and behavioral approval when their ritualized experiences align with their ideal or actual self-images (Yan et al., 2024). Ultimately, Huaman-Ramirez (2021) proposes that, to improve tourists' attitudes toward the destination, destination managers should create a destination image that aligns with visitors' self-perception.

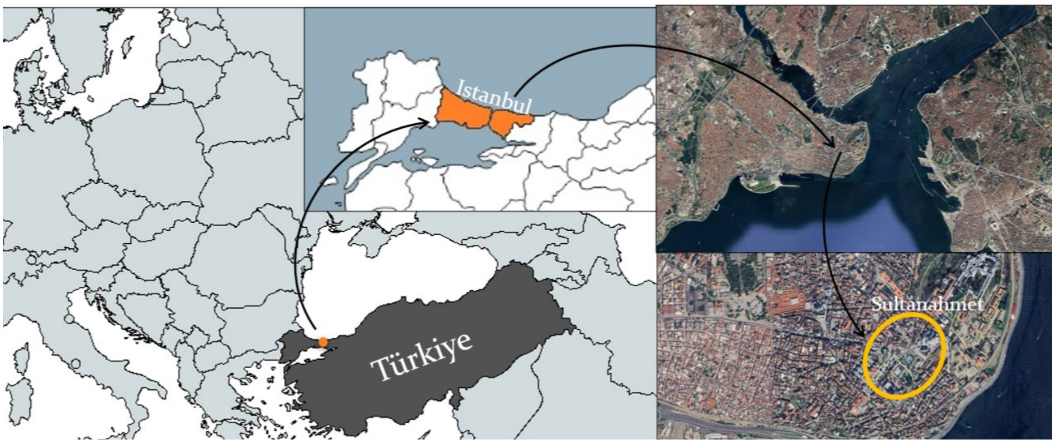
When analyzed from a marketing perspective, self-congruity affects consumer pre-purchase and post-purchase behavior (Sirgy, 2018). When a tourist product and a tourist destination are co-marketed, a tourist's perception of themselves is shaped by the place through place-product image transfer. Tourists' willingness to visit a destination may increase if image transfer is more successful since they will feel more strongly that it aligns with their self-concept (Liu et al., 2023). By developing a self-brand relationship with tourist destinations, travelers communicate, affirm, or strengthen their ideal and authentic selves. Travelers frequently express and retain a positive self by using the romanticism, culture, or personality of the destination that is conveyed in destination advertising (Guo et al., 2024). In respect to today’s environment, social media usage by visitors both during and after their visits is influenced by self-congruity (Luna-Cortés, 2017). Alternatively, Šegota et al. (2022) unveiled that self-congruity directly affects WOM, engagement, expectations and place satisfaction of visitors. Additionally, Kumar (2016) concluded that self-congruity is significantly and positively affected by destination personality and that, destination satisfaction is affected by the self-congruity. On the other hand, Huaman-Ramirez (2021) asserts that, with visitor involvement, positive impact of self-congruity on destination attitude increases. Furthermore, Guo et al. (2024) revealed that advertising for destination and visit intention are mediated by self-congruence.

METHODOLOGY

This study employed a quantitative research design using a structured questionnaire administered to international tourists visiting the Sultanahmet district, located within the historical peninsula (Old City) of Istanbul. Prior to the main data collection, a pilot test with 32 participants was conducted to ensure clarity and reliability of the survey items.

In the study, a quantitative method was employed, using a convenience sampling technique by surveying tourists on-site during their visit to the Sultanahmet heritage area. This non-probabilistic approach is widely used in tourism research, especially in high-density heritage destinations where constructing a complete sampling frame is not feasible (Veal, 2017). Convenience sampling allowed the researchers to effectively reach a diverse group of tourists experiencing the destination. As one of Türkiye's most well-known tourist spots, the Sultanahmet district was selected as the study area. Data collection took place between June and August 2022. A total of 260 questionnaires were distributed, and 226 valid responses were obtained from tourists representing 38 countries.

Figure 1 Location of the Study Area: Sultanahmet District, Istanbul



Source: MapChart (2024), Google (2024).

Fig. 1 illustrates the geographic location of the Sultanahmet district within Türkiye and Istanbul. The left panels show Türkiye and Istanbul's position within the national context. while the satellite images on the right highlight Sultanahmet (marked in yellow) as the core World Heritage tourism area examined in this study.

The research aimed to measure the effect of tourists' existential authenticity on their personal tourist experience, self-congruity, and flow-like experience involvement, as well as the relationships among these variables.

The Flow-like Experience (FEI) construct was measured using the items developed by Zatori et al. (2018). Self-congruity (SC) was assessed through the items proposed by Zhou et al. (2021) within the context of cultural heritage. Tourists' existential authenticity (EA) was measured using the existential authenticity dimension of the authenticity scale developed by Kolar and Žabkar (2010). The Personal Tourist Experience (PTE) construct was measured with the scale developed by Diallo et al. (2022). All scale items were assessed using a five-point Likert-type scale ranging from 'strongly disagree' to 'strongly agree.

The research initially examines the concept of existential authenticity (EA) (Kolar & Zabkar, 2010); which refers to tourists escaping from daily routines and classical mass tourism, contacting their true selves and getting to know their own selves, independent of external pressures. Another concept closely related to above mentioned, self-congruity (SC) (Sirgy, 2018); is a psychological concept that deals with the compatibility of tourists' ideal self-image and actual self-image. Personal tourist experience (PTE), defined by Otto and Ritchie (1996) as a mental state that participants perceive, is another variable used in the research. Another critical variable examined in the study regarding tourists visiting Sultanahmet is flow-like experience involvement (FEI), which emphasizes focusing completely on an activity and enjoying the experience (Ghani & Deshpande, 1994). The research assumes that these four variables are closely related to each other and that these variables affect the tourist's total experience. The study conceptualized existential authenticity as a predictor of self-congruity, personal tourist experience, and flow-like experience involvement. These relationships were examined using structural equation modeling (SEM). The hypotheses tested were:

H1: Existential authenticity among tourists visiting the Sultanahmet district positively and significantly influences their personal tourist experience.

H2: Existential authenticity among tourists visiting the Sultanahmet district positively and significantly influences their level of self-congruity.

H3: Existential authenticity among tourists visiting the Sultanahmet district positively and significantly influences their involvement in flow-like experiences.

Figure 2 Research Model

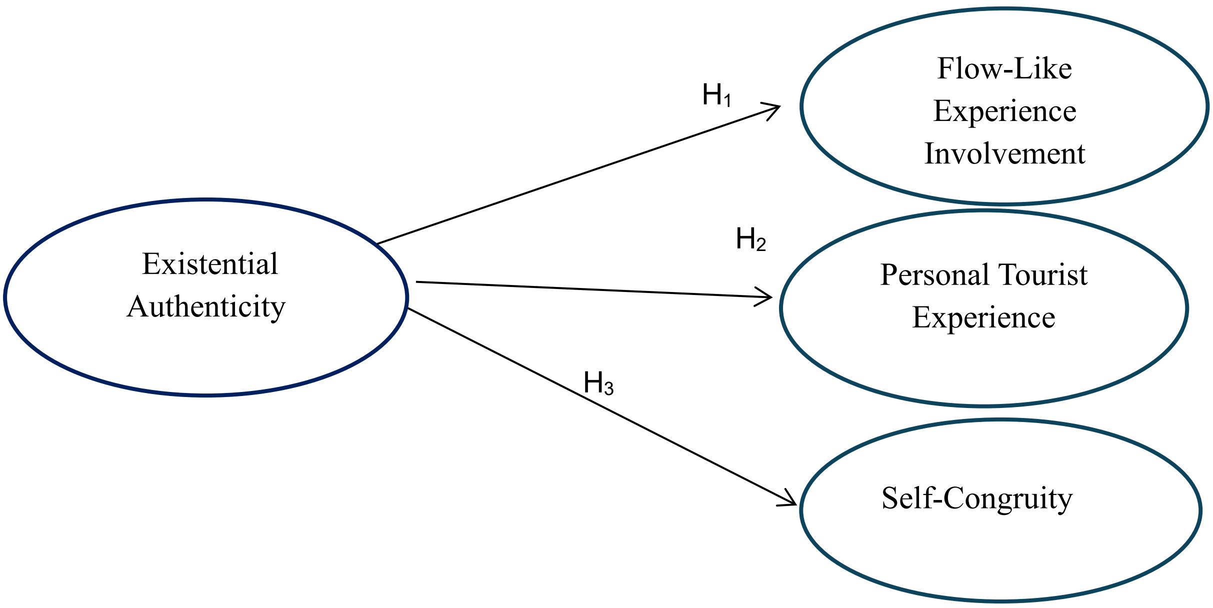


Table 1 Overall CFA for Measurement Model

Items and Constructs	t- values	R^2	Standardized Factor Loadings	CR (Composite Reliability)	AVE* (>0.50)
Existential Authenticity				0,884	0,560
EA_1	*	,536	,732		
EA _2	9,586	,439	,663		
EA _3	11,625	,640	,800		
EA _4	11,050	,579	,761		
EA _5	10,068	,483	,695		
EA _6	11,981	,680	,825		
Self-Congruity				0,933	0,698
SC_1	*	,569	,754		
SC _2	15,733	,714	,845		
SC _3	14,038	,782	,884		
SC _4	14,167	,795	,892		
SC _5	13,147	,698	,836		
SC _6	12,374	,629	,793		
Flow-Like Experience Involvement				0,866	0,519
FEI_1	*	,507	,712		
FEI _2	9,472	,470	,685		
FEI _3	10,617	,591	,769		
FEI _4	10,952	,631	,794		
FEI _5	9,558	,472	,687		
FEI _6	9,304	,446	,668		
Personal Tourist Experience				0,843	0,575
PTE_1	*	,390	,625		
PTE_2	9,450	,673	,820		
PTE_3	11,359	,601	,775		
PTE_4	9,286	,635	,797		

***p<,001, CR> 0.7, AVE>0.5 and CR>AVE
Fornell & Larcker, 1981; Hair et al., 2019)

Table 1 presents the confirmatory factor analysis findings for the measurement model. t values, R2 values, standardized factor loadings, CR, and AVE values for 4 different variables are shown in the table. According to Hair et al. (2019), standardized factor loadings greater than 0.50 in factor analysis are considered practically significant. Factor loadings in the model meet this criterion. AVE and CR values were also assessed for convergent validity of measurement. The table shows that CR values are above 0.7, AVE values are above 0.5, and CR values are greater than AVE values. Table 1 shows that all these criteria are met and the values are within the acceptable range.

Figure 3 Structural Equation Model of the Construct

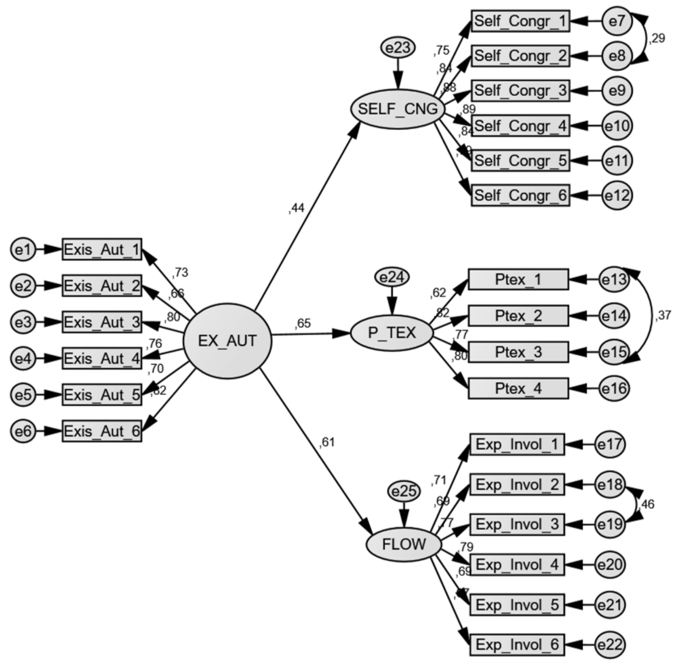


Figure 3 illustrates the effect of EA on SC, PTE and FEI. Variables represent a component of a consistent structural equation model. The requirement for studies using structural equation modeling is that the data must have a normal distribution (Kline, 2011). According to C.R. (Critical Ratio) values of skewness and kurtosis parameters, all variables met the requirements of normal distribution criterion on the basis of the data normality test generated from AMOS output (Westfall & Henning, 2013). In the model created to measure the effect of existential authenticity on self-congruity, personal tourist experience and flow-like experience involvement, although some values were below the recommended interval in the first model, after 7-8, 13-15 and 18-19 modification indices were applied acceptable values were reached. At the final stage of the model, it was found that the existential authenticity has a positive and significant effect on the self-congruity (β= 0.444; $p < 0.001$), the personal tourist experience (β= 0.647; $p<0.001$), and flow-like experience involvement (β= 0.611; $p < 0.001$). Estimative accuracy for the model indicated that existential authenticity represent for about % 19 of the variations in self-congruity (R^2= 0,189), %33 of the variations in personal tourist experience (R^2= 0,335), and %28 of the variations in flow-like experience involvement (R^2= 0,276). The results showed that the measurement model demonstrated the accuracy of goodness of fit (x2/df =1.815 RMSEA = 0.060, IFI = 0.950, CFI = 0.949, TLI = 0.941, NFI=0.894 and SRMR = 0.056)

Table 2 Correlations and Descriptive Statistics of the Variables

Variables	Mean	SD	Cronbach Alpha	EA	SC	FEI	PTE
EA	4,27	0,66	0,882	**1**	0,435*	0,525*	0,579*
SC	3,17	0,93	0,872	0,435*	**1**	0,587	0,595*
FEI	3,83	0,79	0,933	0,525*	0,587*	**1**	0,658*
PTE	3,93	0,82	0,854	0,579*	0,595*	0,658*	**1**

*p<,001 (Two-tailed Pearson correlation is significant).

Table 2 illustrates correlations between variables of the construct. Table 2 shows that Pearson correlation between existential authenticity, (independent variable) personal tourist experience, self-congruity and flow-like experience involvement, range between 0.435 and 0.658 (p<0.001). Cronbach's alpha was used to measure the internal consistency and to assess the reliability of the scales. The table shows that the Cronbach alpha value for each scale was much higher than 0.70 and indicated a good internal consistency (DeVellis, 2012).

Table 3 Demographics of Respondents

Gender	**n**	**Percent (%)**	**Education**	**n**	**Percent (%)**
Male	89	39,4	Primary	59	26,1
Female	137	60,6	High School	15	6,6
Marital Status	**n**	**Percent (%)**	Associate	80	35,4
Married	131	58,0	Bachelor's	58	25,7
Single	95	42,0	Graduate	14	6,2
Age	**n**	**Percent (%)**	**Expenditure**	**n**	**Percent (%)**
18-24	83	36,7	Less than $500	53	23,5
25-29	44	19,5	$500-$1000	41	18,1
30-34	30	13,3	$1001-$2000	45	19,9
35-44	34	15,0	$2001-$3000	36	15,9
45-54	21	9,3	$3001-$4000	21	9,3
55-64	14	6,2	$4001 and above	30	13,3

Table 4 Visit-Related Characteristics of Respondents

Number of Visits	**n**	**Percent (%)**	**Intention to Recommend to Others**	**n**	**Percent (%)**
First	153	67,7	Yes	219	96,9
Second	41	18,1	No	7	3,1
Third	16	7,1	**Revisit Intention**	n	**Percent (%)**
Fourth	16	7,1	Yes	205	90,7
Fifth or more	0	0,0	No	21	9,3
Spirit of Sultanahmet	**n**	**Percent (%)**			
Yes	158	69,9			
No	68	30,1			
TOTAL	226	100	TOTAL	226	100

The demographic and visit-related characteristics of the respondents are presented in Table 3 and Table 4. According to Table 4, more than 2/3 of the tourists visited Sultanahmet for the first time. Besides, approximately 70% of the participants stated that they would like to stay in an accommodation facility where they could feel the spirit of Sultanahmet. Besides, 97% of the participants stated that they would recommend Sultanahmet to others and lastly, more than 90% of the participants stated that they would like to re-visit Sultanahmet in the future.

Table 5 Hypotheses Results of Model Path Analysis

Hypotheses	β	S.E.	t Value	p	Result
H_1 Existential Authenticity ---- Personal Tourist Experience	**0,647***	0,089	6,899	***	Supported
H_2 Existential Authenticity ---- Self_Congruity	**0,444***	0,106	5,778	***	Supported
H_3 Existential Authenticity ---- Flow-Like Experience Involvement	**0,611***	0,100	7,193	***	Supported

***p<,001

Based on the significant effect of existential authenticity on personal tourist experience, H1 hypothesis was accepted (β= 0.647; p< 0.001). The second hypothesis of the research, H2 was also accepted as existential authenticity significantly affects the self-congruity (β= 0.444; p< 0.001). Likewise, the third hypothesis of the research, H3, was accepted as existential authenticity significantly affects the flow-like experience involvement (β= 0.611; p< 0.001).

Table 6 SEM Anaysis Results for the Structural Model

	X^2/df	IFI	CFI	TLI	NFI	SRMR	RMSEA
Ref. Values	<5	≥0,90	≥0,90	≥0,90	≥0,90	<0,08	<0,10
Measurement Model	1,815	0,950	0,949	0,941	≥0,894	0,056	0,060

Table 6 illustrates structural equation model (SEM) results with specified parameters. x2/df, IFI, CFI, TLI, NFI, SRMR and RMSEA were determined and results showed that each of the indices was within the required or close ranges (Hair et al., 2019). According to the goodness of fit indices shown in the table, the SEM shows a good fit of the model.

CONCLUSIONS

Heritage tourism constitutes an important component of tourism attractions as it involves the interpretation and presentation of historical resources to contemporary visitors. Sultanahmet, located within the Historic Peninsula of Istanbul, represents one of Türkiye’s most historically layered heritage areas, characterized by its concentration of monumental structures and long-standing cultural significance. Despite its prominence as a major visitation zone, the experiential and psychological dimensions of tourist engagement within this setting have not been extensively examined in the heritage tourism literature. This study contributes to filling this gap by empirically exploring existential authenticity and its influence on key experiential outcomes among visitors to Sultanahmet.

In the contemporary tourism landscape, marked by rising interest in alternative tourism, visitors increasingly pursue authentic and meaningful experiences. Tourists who gravitate towards tourism types and destinations that match their own selves participate in tourism activities with a unique focus, being caught up in the flow of the mystical atmosphere and sense of place in that region. Supporting this point of view, Canavan (2018) asserted that tourists' participation in self-actualization activities that have deeper meanings and are more challenging than a classical tourism activity reveals that it is worth investing in these heritage destinations. In addition, he revealed that a tourism experience integrated with the concept of authenticity is a more inclusive type and more compatible with alternative tourism.

The results of this research conducted with 226 visitors from 38 countries revealed that tourists' existential authenticity have a positive and significant effect on the self-congruity (β= 0.444; $p<0.001$), the personal tourist experience (β= 0.647; $p<0.001$), and flow-like experience involvement (β= 0.611; $p<0.001$). The main framework that forms the essence of this research is the simultaneous use of 4 variables (EA, FEI, SC & PTE), which have not been considered together in previous tourism studies, although they have a common denominator and are related to each other by means of context. Moreover, participants from 38 countries in this study revealed a cosmopolitan and homogeneous nature of the research. The analysis showed that over two thirds of the tourists are first-time visitors to Sultanahmet. Remarkably though, almost 70% of participants expressed their desire to stay in a lodging where they could experience Sultanahmet's spirit. Besides, 97% of the participants stated that they would recommend Sultanahmet to others and lastly, more than 90% of the participants stated that they would like to re-visit Sultanahmet in the future, which demonstrates Sultanahmet’s significance in terms of its heritage tourism potential.

Considering the religious aspect, the most remarkable characteristics of the Sultanahmet heritage area is that it comprises masterpieces of both Christianity and Islam. To illustrate, Hagia Sophia, which construction started in 532, is a building that is still considered meaningful for the Christian community as well as for Muslims. Moreover, Sultanahmet is a multi-layered region that has been used for many different purposes throughout history. However, Aykaç

(2019) highlights that although the Sultanahmet district has long drawn travelers, it wasn't until the state-driven tourism programs of the mid-1980s that it became a significant travel destination.

From marketing point of view, Qiu and Zuo (2023) revealed that even cultural heritage labels in heritage sites influence destination image and improve tourists' visiting intentions through label-based cognitive and emotional ways. Additionally, as stated by Y.-H. Lu et al. (2022), certain aspects of the soundscape in a destination can induce a state of flow in tourists and thus affect their experiential behavior. Furthermore, Wasaya et al. (2024) found that tourists give priority to places that have heritage characteristics when choosing a destination. These are crucial perspectives for comprehending the Sultanahmet since historically, there used to be traditional houses built in horizontal architectural style in Sultanahmet, and in today's conditions, traditional appearance of these houses have not changed. As these buildings are now used as hotels and guesthouses, it becomes possible for visitors to internalize spirit of Sultanahmet more deeply and experience nostalgia and authenticity in the destination. This is also corroborated by our study's outputs.

Overall, the findings demonstrate that existential authenticity is not simply a desirable attribute of heritage tourism, but the psychological engine that powers deeper identity alignment, immersive flow states, and meaningful tourist experiences, positioning it as a foundational mechanism that future heritage tourism research can no longer overlook. When authenticity aligns with the self, heritage places cease to be backdrops and become catalysts for identity, immersion, and lasting experiential value.

IMPLICATIONS

This study makes a distinctive theoretical contribution by showing that existential authenticity is not merely an affective component of heritage tourism but a core psychological mechanism that activates self-related processes and deep experiential immersion. By empirically integrating EA, SC, FEI, and PTE into a single structural model, an approach not previously applied in heritage tourism research, this study integrates multiple psychological constructs into a unified theoretical framework and advances the understanding of authenticity-driven experiences in heritage contexts. Conducted in Sultanahmet, a highly layered World Heritage setting with exceptionally strong visitor intentions to recommend and revisit, the findings highlight that historically dense and symbolically charged environments are uniquely capable of triggering these authenticity-driven psychological responses and enhancing the depth of tourist experiences.

Istanbul's Sultanahmet Urban Archaeological Site is the only location where decisions of Tourism Site, Urban Site, Renewal Site and World Heritage meet (Örnek, 2023). Illustrating the anthropogenic contributions of carbon-based energy sources to climate change, Lafrenz Samuels & Platts (2020) argued that, besides natural and environmental impacts, social impacts on heritage resources are also unavoidable. Taking this issue into consideration, it is essential to resolve the problem of tourist density, which still reaches very high numbers in the region. In addition, the problem of protecting heritage resources is a common problematic aspect not only of Sultanahmet but also of tourism destinations around the world.

At heritage tourism destinations, sociocultural dynamism is predominately important for the development of cultural inheritance-based innovation. Essential elements that regulate and guide the development of this innovation and the authenticity of a tourism destination are approved cultural preservation and development plans (M.-Y. Wang et al., 2024). Moreover, in order to protect the Sultanahmet district, further development of international authority collaborations and initiatives for historical management should be made to safeguard and promote Sultanahmet.

Theoretical Implications

The findings yield several significant theoretical implications. First, the strong effect of EA on self-congruity provides empirical support for the proposition that authentic encounters allow visitors to align their real and ideal self-images with the cultural meanings of the destination. This extends self-congruity theory by demonstrating that identity-place alignment in heritage tourism is triggered by existential states rather than solely by symbolic interpretation or destination personality. Moreover, the influence of EA on PTE reinforces the established view that authenticity is a central driver of emotionally meaningful and cognitively rich experiences. The results strengthen experiential consumption theory (Holbrook & Hirschman, 1982) by revealing that existential authenticity functions as a catalyst that heightens evaluative, reflective, and emotional dimensions of tourist experience, confirming arguments within the experience economy literature that meaningfulness emerges from personal resonance rather than passive observation.

Additionally, the positive effect of EA on FEI broadens the applicability of Csikszentmihalyi’s (1990) flow theory within tourism. The findings indicate that high-authenticity cultural and historical environments do more than simply serve as physical settings; they can foster psychological conditions that enable visitors to experience deep attentional absorption, intrinsic enjoyment, and a diminished awareness of time during their visit. This suggests that authenticity in tourism is not limited to narratives, symbolic representations, or destination imagery; rather, it functions as a core psychological mechanism that triggers a strong sense of experiential immersion. In other words, existential authenticity plays a pivotal role in helping tourists develop a meaningful connection with the place, become fully engaged in the moment, and derive deeper satisfaction from the overall heritage experience.

Ultimately, the integration of EA, SC, PTE, and FEI within a single SEM framework offers a coherent and multi-layered psychological perspective that strengthens theoretical understanding in heritage tourism research. Unlike previous studies that treated these constructs independently, the present model empirically demonstrates how existential authenticity serves as the foundational mechanism that shapes tourists' identity alignment, immersive involvement, and perceived experience quality. By revealing these interconnected pathways within heritage settings, the study provides a consolidated framework that enhances conceptual clarity and supports more comprehensive explanations of visitor engagement dynamics in culturally significant destinations.

Practical Implications

The findings of this study generate several practical implications for destination managers and heritage stakeholders. Initially, enhancing the authenticity of visitor experiences requires the development of meaningful cultural touchpoints. Narrative-based interpretation, guided heritage walks, and artisan demonstrations can strengthen visitors' perceptions of existential authenticity by facilitating deeper cultural engagement. Additionally, marketing strategies should be aligned with identity-related themes such as self-discovery, reflection, and cultural connection to reinforce self-congruity and increase the personal relevance of the destination.

Moreover, improving site organization and alleviating sensory and physical congestion may foster flow-like experiences, enabling visitors to engage more fully with the historical environment. Measures such as immersive route design, improved spatial orientation, and the reduction of environmental overload can contribute to experiential immersion. Besides, effective visitor density management remains essential in mitigating overtourism pressures. Strategies including pedestrianization, timed entry systems, and visitor dispersal to alternative heritage corridors can support both experiential quality and destination sustainability.

Finally, the preservation of heritage assets requires the continuous strengthening of conservation practices. Ensuring responsible visitor behavior and maintaining the integrity of architectural and cultural resources contribute not only to long-term heritage protection but also to the provision of meaningful, authenticity-driven experiences that align with the psychological needs highlighted in this study.

Practical Implications for Sultanahmet

Because Sultanahmet is one of Türkiye's most symbolically charged and historically layered heritage areas, the findings have several context-specific implications:

- The district's multi-layered religious and cultural heritage offers unique potential for identity-based and authenticity-driven storytelling.
- The presence of historical soundscapes, architectural forms, and ritualized cultural memory can be leveraged to support flow-like engagement.
- The widespread desire among visitors to stay in accommodation that reflects the "spirit of Sultanahmet" (70%) highlights the importance of heritage-aligned lodging design and preservation of traditional architectural forms.

Furthermore, while operational measures such as pedestrianization efforts, traffic restrictions, and congestion management remain necessary for sustainability, the current findings emphasize that these strategies should also be framed as tools to enhance experiential quality rather than merely preserve physical heritage.

FUTURE RESEARCH DIRECTIONS

The demonstrated interconnections among EA, SC, PTE, and FEI open up several meaningful pathways for further scholarly exploration.

Future studies should examine sustainability-oriented strategies for managing overtourism in dense heritage settings such as Sultanahmet, with particular attention to safeguarding historical and cultural values at risk of degradation. In addition, cross-cultural comparisons could investigate whether visitors' cultural backgrounds moderate the influence of authenticity on experience formation. Further comparative analyses of different types of authenticity may also identify which form exerts the strongest influence on experiential outcomes in dense urban heritage settings.

Additionally, the growing role of social media in shaping and performing authenticity warrants closer examination, particularly in disentangling how tourists construct "displayed authenticity" online versus the authenticity they privately experience on-site. Finally, future studies could explore how narrative transfer occurs through guided storytelling, assessing how tourists internalize layered historical accounts and incorporate them into their own identity narratives and sense of meaning during the heritage experience. Furthermore, future research could benefit from emotionally informed spatial analyses that map how visitors' moment-to-moment feelings evolve while navigating different micro-locations within the Sultanahmet district, offering a deeper understanding of authenticity hotspots and emotional resonance zones.

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Original scientific paper

RURAL GUESTHOUSE ATTRACTIVENESS IN CROATIA: A PILOT ANALYSIS USING A MULTICRITERIA APPROACH

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Abstract

The Croatian tourism sector is strongly oriented towards the coastal regions and follows the proven model of "sun and sea". Rural guesthouses, as a new type of tourism offer run by family farms, are a promising way to diversify the Croatian tourism portfolio and revitalize the rural economy. This study introduces a methodological framework for evaluating rural guesthouse attractiveness using a multi-criteria decision-making (MCDM) approach. The model, tested on a pilot sample of five rural guesthouses in continental Croatia, incorporates expert assessments of five key criteria—location, price, equipment, environmental sustainability, and additional services along with 21 sub-criteria. The research assumes that multi-criteria methods provide a clear and systematic way to assess attractiveness and examines the role of price, recognizing that lower prices do not necessarily make a facility more appealing. Findings confirm the usefulness of MCDM for structured evaluation and show that location and equipment rank higher than price. Rather than relying on generic lists of attractiveness factors, the approach identifies and prioritizes key elements that could enhance a guesthouse's appeal to tourists.

Keywords: rural tourism, guesthouse, multicriteria decision making, Croatia

INTRODUCTION

Tourism is an exceptionally important economic sector for Croatia. According to the Croatian National Bank (CNB, 2023), tourism accounted for 19.4 % of Croatia's total gross domestic product (GDP) in 2022, which is by far the largest share in the EU. Unfortunately, the development of tourism is unevenly distributed, both territorially and seasonally. Most tourists spend their vacations in the coastal regions of Croatia, enjoying the sunny weather and beaches, especially between June and August. In other Croatian regions, tourism is still sporadic and underdeveloped compared to the tourism potential of the rural parts of continental Croatia.

A rural area is an area where the natural landscape and traditional way of life predominate. These areas are located outside the cities in the countryside and can be agricultural areas, small towns, villages and the like. Rural areas are often underdeveloped and have a poor economic and demographic situation. This is also the case in Croatia. To further develop rural areas, one of the drivers of their development is rural tourism, which has gained increasing economic importance in recent years as a form of sustainable economic activity to strengthen rural areas. Diversification into the service sector, especially rural tourism, offers a way to revitalize rural communities. Croatia's natural beauty and cultural heritage make it a prime location for successful rural tourism initiatives. This promotes sustainable development by encouraging the responsible use of these resources, achieving a critical balance between economic prosperity and environmental health (Ćurčić et al., 2021).

Rural guesthouses are accommodation establishments in rural areas that are usually run by family farms. According to the Regulation on the Register of Family Farms (Official Gazette 62/2019), these establishments are among the tourist and gastronomic activities that can be offered by farmers in Croatia.

The question of what attracts a tourist to destination or accommodation unit is an issue of relevance in tourism research for decades. Numerous studies have aimed to identify the determinants of competitiveness and attractiveness, such as the location attractiveness, richness of cultural issues, price, authenticity of experience, hospitality and quality of service (Dwyer & Kim, 2003; Crouch, 2011). In rural tourism specifically, tradition, heritage and environmental impact are also significant factors that shape tourists' perceptions (Kastenholz et al., 2012). A few studies show that price is one of the key factors in the attractiveness of tourist destinations. Hefny (2023) finds that tourist arrivals strongly depend on price competitiveness, while evidence from European countries (Radukić et al., 2023) confirms that travelers compare relative prices across destinations when deciding where to go. It is to be expected that accommodation price will be an important determinant of the attractiveness of rural guesthouses in Croatia, given that the purchasing power of domestic tourists is still lower compared to the EU average. However, the sensitivity of rural tourism to price and income fluctuations is lower compared to mass tourism, according to Muñoz (2007, as cited in Fichter and Román, 2023). It is therefore reasonable to assume that price will not constitute the primary determinant of the attractiveness of rural accommodation facilities.

In Croatia, rural guesthouses do not have a long-standing tradition, so their owners often have limited knowledge about which factors most strongly influence their attractiveness to tourists and to what extent these factors justify accommodation pricing.

Despite numerous studies identifying factors influencing tourism attractiveness, the existing literature rarely quantifies the relative importance of these factors for rural guesthouses or provides structured models for comparing alternative facilities. Previous research largely relies on descriptive lists of attributes and lacks methodological frameworks for ranking rural accommodation options. Furthermore, the Croatian context remains underexplored, particularly regarding how non-price attributes contribute to the perceived attractiveness of rural guesthouses. In this context, application of Multi-Criteria Decision-Making (MCDM) methods offers a disciplined and systematic way to fill this gap.

The aim of this study is to develop and demonstrate a multi-criteria evaluation model for assessing the attractiveness of rural guesthouses and to test its applicability using a pilot sample of accommodation facilities in continental Croatia.

THEORETICAL BACKGROUND

Croatia's accession to the European Union (EU) in 2013 brought changes to the country's economy, including progress in rural development. While coastal tourism remains crucial to the Croatian economy, contributing around 19.4 % to Croatia's gross domestic product (CNB, 2023), the tourism offer has diversified in recent decades. This includes the development of sectors such as rural tourism, health tourism and transit tourism (Grgić, 2017). The universal definition of rural tourism is still the subject of ongoing debate, with no agreed definition yet (Pearce, 1989; Bramwell, 1994; Seaton et al., 1994, de Sousa and Kastenholz, 2018). Rosalina et al. (2021) conducted a literature review that included 125 academic and professional references in the field of rural tourism. They found that only 36% of the articles studied explicitly defined rural tourism, while the rest conceptualized rural tourism without providing a definition. One way to better understand what rural tourism means is to describe the range of tourism products and services offered in rural areas.

This study focuses on rural guesthouses, a type of accommodation in non-urban areas. These guesthouses, usually run by local family farms, offer tourists unique and authentic experiences. According to the Regulation on the Classification and Categorization of Establishments Providing Hospitality Services on Family Farms (Official Gazette 54/16), a rural guest house is an establishment where a family farm provides accommodation and use of the farmyard and is equipped to allow guests to prepare and eat their own food.

Joshi et al. (2024) conducted a meta-analysis in the field of rural tourism, which included 78 selected scientific publications after careful selection. Among other things, the authors identified the predominant themes. The analysis led to the identification of 10 main themes of which 27% are focused on the study of tourist preferences and aimed to understand the factors that influence tourists' choices and desires. Choosing a destination is a complex process that often requires time and careful consideration for tourists (Kyriakaki et al., 2020). Tourists choose a destination based on a variety of factors that influence their decision-making process. These factors can be categorized into several key aspects, including personal preferences, travel motivations, destination characteristics, accessibility, and external influences (Jansen-Verbeke, 1986; Ritchie and Crouch, 2003; Vareiro and Ribeiro, 2005; Li, M., & Cai, L. A., 2012; Seyidov and Adomaitienė, 2016). Many authors have divided the destination decision factors and analyzed them as "push and pull" factors". "Push" factors are those that encourage tourists to leave their familiar surroundings and take a trip. These can be factors such as: Boredom or routine in everyday life, the desire for relaxation and recreation, the need for adventure and new experiences, the desire to get to know other cultures and sights. “Pull" factors are factors that attract tourists to a particular destination. These can be factors such as natural beauty of the destination, climatic conditions, cultural offerings and attractions, availability and infrastructure, prices and accommodation options. The decision for a vacation destination is usually the result of a combination of "push" and "pull" factors. Analyzing push and pull factors in isolation without considering the broader context of Expectancy-Value Theory limits our understanding of their influence on decision-making (Crompton and Petrick, 2024). Expectancy-value theory (Vroom, 1964) states that people choose vacation destinations based on their expectations of how well the outcomes will match their desired needs. Taking the Romanian region of Vrancea as an example, Stănilă and Barbu (2016) conclude that the possibility of hiking in the park, relaxing while admiring the surrounding landscape, visiting historical and cultural destinations, and making the cost of accommodation and food affordable, but also getting to know a new area, are, in roughly equal parts, the factors that determine the choice of a tourist location. Albaladejo-Pina & Díaz-Delfa (2009) used discrete choice modeling to identify the factors that influence tourists' preferences for staying in rural guesthouses in the Region of Murcia, Spain. The authors identify several factors that influence the attractiveness of rural guesthouses. These include traditional architectural style, location in the countryside, number of rooms, possession of the 'Q' quality certificate and the possibility of renting horses. In addition, certain features can increase the attractiveness for certain groups of tourists. For example, families with children might be attracted to properties with a mini-farm, while frequent travelers might prefer the flexibility of booking single rooms. On the other hand, sharing a bathroom could be a disadvantage for some guests. The fact that the house is a new building, located in an orchard or only rented as a whole house can also have a different impact depending on individual preferences.

Effective methods for upgrading individual destinations at the level of pull factors are multi-criteria decision analysis (MCDA) methods. They have the advantage that they do not negate the often-contradictory selection criteria, but integrate them into a logical, hierarchical model. The databases of scientific works contain numerous studies on this topic whose authors have used one of the multi-criteria methods in the evaluation of tourist destinations. Botti and Peypoch (2013) state that their application of the multi-criteria ELECTRE method for the purpose of comparative assessment of four Hawaiian Islands is the first application of ELECTRE I in this area. Göksu and Kaya (2014) used the Fuzzy Analytic Hierarchy Process to compare six tourism destinations in Bosnia and Herzegovina. When analyzing 13 tourism destinations in four cities in Turkey using multi-criteria AHP and TOPSIS methods, Önder et al. (2013) identified "safety and security", "health and hygiene" and "price" as the three most important criteria in provider selection. Ali et al. (2012) present a fuzzy MCDM approach for evaluating social attributes of Malaysian islands. Their results show that the two most important aspects for a destination are attractiveness (0.331) and environment (0.254), while the least important aspect is souvenir (0.013). Rozman et al. (2009) used a combination of questionnaires and expert brainstorming to create a DEXi multi-criteria model for the evaluation of service quality at seven tourist farms in Slovenia. Prevolšek et al. (2023) analyzed the efficiency of a sample of 45 tourism farms from different regions of Slovenia using a combination of Data Envelopment Analysis (DEA) and Analytic Hierarchy Process (AHP).

The hypotheses of this research are: (a) multi-criteria methods allow a simple and explicit assessment of the attractiveness of rural guesthouses, (b) accommodation price is an important determinant of rural guesthouse attractiveness; however, lower-priced facilities are not necessarily perceived by experts as more attractive.

DATA AND METHODS

In 2017, the Croatian Ministry of Economy published a guide describing a step-by-step procedure for selecting the most economically advantageous tender in public procurement (MEAT). In this article, we adapt this procedure, which is based on multi-criteria decision analysis, for the evaluation of most economically advantageous private business projects. Specifically, we use the same framework to evaluate rural guesthouses on the Croatian mainland, considering both price and non-price attractiveness factors. To do so, an approach based on an Additive Value Function (AVF) was used. The AVF applies a weighted scoring system where each alternative receives a score for each award criterion and the criteria themselves have different levels of importance (Lehtonen and Virtanen, 2022).

This can be represented by the following formula:

$$V(x) = \sum_{i=1}^{n} w_i v_i(x_i)$$

where

$V(x)$ is the overall value (or score) of alternative x,

n is the total number of criteria considered in the evaluation,

w_i is the weight of criterion i, representing its relative importance,

$v_i(x_i)$ is the partial value function of award criterion i, and

x_i is the performance (or measurement level) of alternative x on the scale of criterion i.

Two similar multi-criteria methods based on AVF were used in the paper - Simple Multi-Attribute Rating Technique (SMART) and Fixed-Point Allocation. SMART was developed by Edwards in 1971 and is used in this study to evaluate the criteria for rural guest houses. It is classified as a compensatory method, meaning that strong performance on one criterion can compensate for weaker performance on another. The SMART technique is based on the Multi-Attribute Utility Theory (MAUT). It uses a simple scoring system in which each factor (e.g. location or price) is scored from 0 to 100 points depending on its importance. The total score for an option is then calculated by adding up the weighted scores for each factor. In Fixed-Point Allocation weighting method, the decision maker assigns the weights directly by assigning a predetermined sum of points to the options (Zardari et al., 2015). A higher point allocation means that a sub-criterion is more important. In the study, the fixed point allocation method was used to assess the relative importance of the sub-criteria. Experts allocated 15 points to three groups of sub-criteria and 10 points within another group.

In the introduction, there is some research given which listed criteria for assessing the attractiveness of a tourist destination. Additionally, the Global Sustainable Tourism Council (2019) identified 38 factors that characterize a tourist destination. Having so many criteria make it difficult to ensure accuracy and consistency in using MCDM (Pamučar et al., 2018).

In this study, five main criteria were selected to measure the attractiveness of rural accommodation: location, price, equipment, environmental sustainability, and additional services. These criteria were selected because previous research consistently highlights them as key factors influencing tourist decisions. Studies emphasize the importance of *location* (Crouch, 2011; Dwyer & Kim, 2003), *price competitiveness* (Hefny, 2023; Martin, 2014; Radukić et al., 2023), *facility equipment* (Albaladejo-Pina & Díaz-Delfa, 2009), *environmental sustainability* practices (GSTC, 2019; de Sousa & Kastenholz, 2018), and the added value of tradition and heritage in the form of *additional services* (Kastenholz et al., 2012).

In addition to strong support in the literature, these criteria frequently appear in the descriptions and offers of rural guesthouses on specialized booking platforms, confirming their practical importance for the evaluation model.

Each of these criteria was further divided into sub-criteria, 21 in total. The selection of sub-criteria was guided by their frequency in rural tourism literature and their consistent presence in booking platform descriptions, ensuring both scientific grounding and practical relevance. Since expert-based evaluation in the MCDM approach is, to some degree, dependent on subjectivity, highly arbitrary considerations such as host friendliness were excluded from the model.

Eight experts from the rural tourism sector took part in the group decision using the SMART multi-criteria decision-making method. Among them were four university experts specialized in rural tourism. The other four experts were the head of the Tourist Board of the Northwest Croatia region, the head of the Local Action Group (LAG) responsible for rural tourism development in the local administration, a representative of a rural development consultancy and the owner of a rural guesthouse (his rural guesthouse is not one of those evaluated in this paper).

Five rural guesthouses from different parts of Croatia that offer their services on the Booking.com platform were selected for the MCDM assessment. To ensure comparability, the following filters were applied: price per night in June 2024 between 150 and 300 euros, a minimum guest rating of 9.0, and suitability for a family of four (two adults and two children). The selected guesthouses do not represent a statistically representative sample of rural tourism facilities in Croatia, but rather a purposive pilot sample chosen to test the applicability of the developed MCDM model. The guesthouses were located within approximately 100 km of each other to minimize the influence of differing climatic, geographic, and environmental conditions on the evaluation. Additionally, the selection was limited by the availability of publicly accessible information on environmental sustainability, which is still provided by only a small number of facilities in Croatia.

RESULTS

Selected Rural Guesthouses

Ninety-five (95) rural guesthouses on the Croatian mainland matched the search filters set on Booking.com. Five of them were specifically selected to provide information on all review criteria in the description of their offer. To avoid a promotional tone in this article, their names are not mentioned in this research. Instead, they are referred to as Rural Guesthouse (1-5)

Rural Guesthouse 1 (RGH 1)

The house is located in Međimurje County, has a total area of 150 square meters and has a garden and terrace, has 3 bedrooms, a separate kitchen and living room, and a bathroom with toilet. Near the house there is volleyball and handball court, adrenaline park, sports park Kerman, street workout and labyrinth of love. Zagreb airport is 83 km away. The house has been awarded the level 2 label for sustainable travel by Booking and has the European Ecolabel certificate (the official eco-label of the European Union). The house uses solar energy, offers homemade organic products, is built from natural materials - mainly wood - and recycles waste. Additional services offered to visitors include free breakfast and a transportation service. The price per night is € 285.

Rural guesthouse 2 (RGH 2)

Like the previous one, this rural guesthouse is located in Međimurje County, has an area of 350 square metres and consists of 3 bedrooms, a kitchen, a dining room and a bathroom. The house is located 2.6 km from the thermal baths and 109 km from Franjo Tuđman Airport in Zagreb. There are two restaurants and a park near the guesthouse. The facility has been awarded the level 2 sustainable travel label by Booking. There are special containers for recycling waste in the property. The guesthouse has air conditioning in all units, a coffee machine and dishwasher in the kitchen and offers a grocery delivery service and a transportation service. The price per night is €194.

Rural guesthouse 3 (RGH 3)

This guesthouse is located in Zagreb County, 35 minutes by car from Zagreb. The surface of the house is 150 square metres and it contains 3 bedrooms, a living room, 3 bathrooms and a kitchen. The entire facility is air-conditioned. The house has a garden and a terrace with outdoor dining area. There is a restaurant in the complex that offers local traditional dishes. There are also two cafés near the house. There is also a handball court and many adrenaline and sports parks. The guesthouse uses solar energy, is built from natural materials and recycles waste. It also offers a grocery delivery service, free breakfast and a transportation service. The price per night is €150.

Rural guesthouse 4 (RGH 4)
Like the previous one, this rural guesthouse is located in Zagreb County. Has an area of 110 square meters and consists of 2 bedrooms, 3 bathrooms, a dining room and a fully equipped kitchen. The house has an outdoor pool, a garden with a fireplace and barbecue equipment. The nearest airport is Zagreb Airport, 34 km away. The house has been awarded the label for sustainable travel level 1, recycles waste, and natural materials were used in its construction. The house also offers a transportation service and has a dishwasher and coffee machine. The price per night is € 213.

Rural guesthouse 5 (RGH 5)
This rural guesthouse in Varaždin County is about 240 years old and has been renovated in the old style using natural materials. The house has an area of 50 square meters and consists of 1 bedroom, living room, kitchen and bathroom. The house has a garden with an outdoor dining area and a terrace. Nearby there is a well-organized arboretum, two playgrounds and a handball court. The house has a hydromassage bath and is air-conditioned. It also offers a shuttle service and has a coffee machine and dishwasher. The price per night is € 203.

Development of a multi-criteria model for the evaluation of a rural guesthouse
As is common in multi-criteria decision problems, the model used to determine the problem of evaluating and ranking rural guesthouses is based on a hierarchical structure with a certain number of criteria and sub-criteria. Five key criteria for comparison are indicated as:

- Price per night (C1)
- Location of the facility (C2)
- Equipment of the facility (C3)
- Environmental sustainability of the facility (C4)
- Additional services offered at the facility (C5)

The following table shows the individual ratings of the eight experts, the average rating of the group and the normalized weights of the evaluation criteria of the rural guesthouses. The following formula was used for normalization:

$$w_i = \frac{average\ c_i}{\sum_{i=1}^{n} C_i}$$

where

wi is normalized weight of criteria i,

average ci is an average points of criteria i.

$\sum_{i=1}^{n} C_i$ is the sum of the average scores of all n criteria

Table 1 Experts' ratings and normalized weights of the evaluation criteria for rural houses

	Price per night (C_1)	Location (C_2)	Equipment (C_3)	Environ. sustainability (C_4)	Additional services (C_5)
Expert 1	90	100	80	50	80
Expert 2	70	100	90	50	60
Expert 3	90	95	100	70	90
Expert 4	80	100	80	20	60
Expert 5	95	100	85	50	65
Expert 6	60	85	100	60	85
Expert 7	60	85	100	45	55
Expert 8	100	100	60	40	45
Average Points	80.6	95.6	86.9	48.1	67.5
Normalized weights	0.21	0.25	0.23	0.13	0.18

Each of the qualitative criteria (C2-C5) included several sub-criteria for comparison. The importance of the sub-criteria is determined by the method of Point Allocation.

For the location criterion (C2) there is a maximum of 15 points, which are distributed according to the criteria listed in the following table.

Table 2 Sub-criteria for the assessment of Location of the facility (C2)

Distance of Rural guesthouse to:	*less than*	*Points*
Airport	20 km	3
City	10 km	3
Sea, river or lake	10 km	3
Nature park and/or National park	20 km	2
Cultural sights	10 km	2
Park/Playground for children/Sports field	5 km	1
Restaurant	2 km	1
Total		**15**

The same approach was used to structure the sub-criteria that make up the criterion "Equipment of the facility (C3)". Five sub-criteria were used for this purpose, to which points were assigned according to their estimated importance for the selection of visitors.

Table 3 Sub-criteria for the assessment of Equipment of the facility (C3)

Equipment of the facility	*Points*
Minimum of two rooms and one living room	4
Minimum house area of 70 square meters	4
House has a pool and/or hot tub	3
House has 3 or more bedrooms	2
House has Air Conditioning	2
Total	**15**

Six sub-criteria were used to structure the environmental sustainability of rural guesthouses, which, like the previous criteria, add up to a total of 15 points.

Table 4 Sub-criteria for the assessment of Environmental sustainability of the facility (C4)

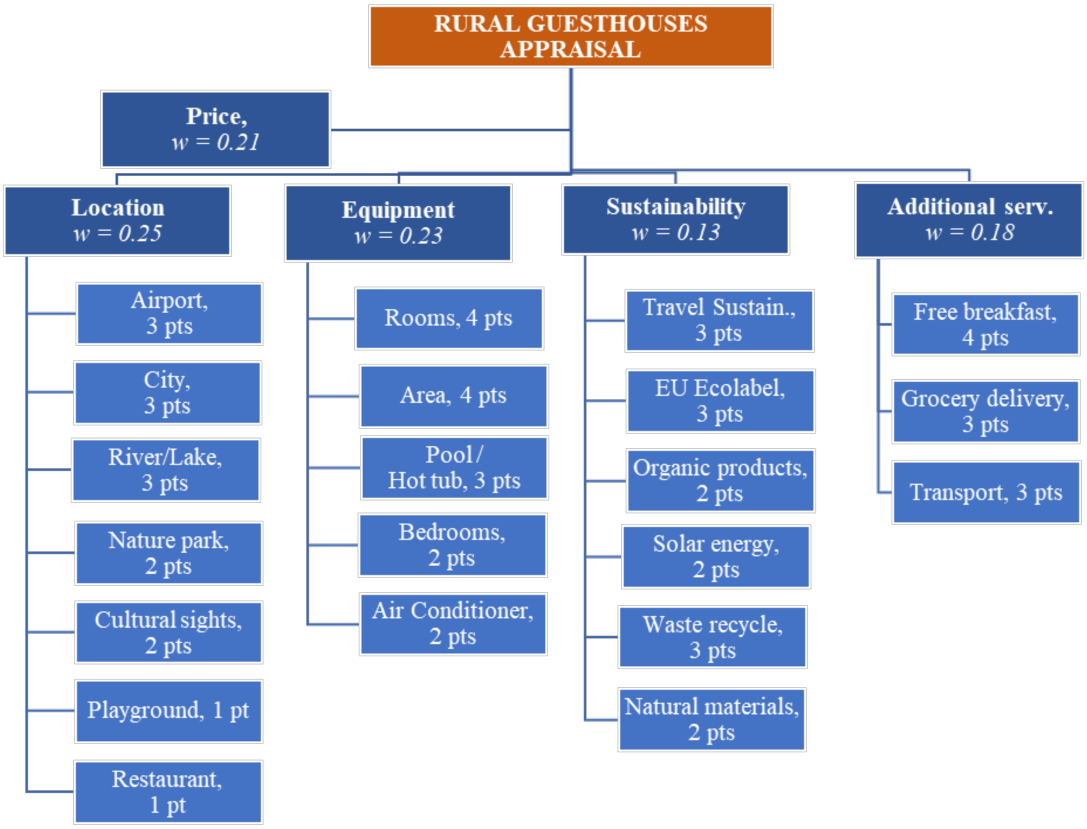
The house is certified with the Travel Sustainability, at least level 2	3
The house is certified with the EU Ecolabel for accommodation	3
The menu consists of local organic products	2
The house uses solar energy	2
Waste is recycled in the house (there are waste containers)	3
House is built from natural materials	2
Total	**15**

As this study looked at rural guesthouses for guests with higher payment options, these guests also expect above-average services. The additional services criterion is made up of three sub-criteria with a maximum score of 10 points.

Table 5 Sub-criteria for the assessment of Additional services offered at the facility (C5)

Free in-house breakfast	4
Grocery delivery	3
House offers transportation service	3
Total	**10**

Figure 1 Rural guesthouses multicriteria model evaluation



Source: Own editing

Rural guesthouses appraisal

In the final step of the evaluation of the rural guesthouses, specific variables were entered for the price and non-price attractiveness factors. For reasons of methodological correctness, their values were normalized on the basis of linear "max" normalization (Mokotoff et al., 2010). This procedure transforms the evaluation vector, (a1j, a2j,..., amj), of each criterion, Cj, into a normalized one by making:

$v_{ij} = \frac{a_{ij}}{\max a_{ij}}$, in case of benefit criteria or,

$v_{ij} = \frac{min_{ij}}{a_{ij}}$, in case of cost criteria.

Therefore, for each criterion, Cj, the normalized value of the best alternative is 1, and all others are percentages of the maximum value, resulting in the interval 0<vij ≤1.

The following table shows the original and normalized variables which, together with the previously calculated weights of the comparison criteria of the rural guesthouses, result in their overall comparative score. Among the evaluated options, rural guesthouse 3 offers the most attractive value for money, scoring 0.81 overall. Although at first glance it appears that this is due to the significantly lower price of this house, the ranking of the other houses refutes such an opinion. In second place is rural guesthouse 1, whose significantly higher price compared to its competitors did not result in a lower position in the overall ranking.

Table 6 Comparative score of rural guesthouses

criteria	**weights**	**RGH 1**	**RGH 2**	**RGH 3**	**RGH 4**	**RGH 5**	**RGH 1**	**RGH 2**	**RGH 3**	**RGH 4**	**RGH 5**
		original values					*normalized values*				
Price per night, €	*0.21*	285	194	**150**	213	203	0.53	0.77	1.00	0.70	0.74
Location, pts	*0.25*	**12**	10	7	3	3	1.00	0.83	0.58	0.25	0.25
Equipment, pts	*0.23*	10	12	12	**13**	5	0.77	0.92	0.92	1.00	0.38
Sustainability, pts	*0.13*	**15**	6	7	5	2	1.00	0.40	0.47	0.33	0.13
Add.services, pts	*0.18*	7	6	**10**	3	3	0.70	0.60	1.00	0.30	0.30
OVERALL SCORE							**0.79**	**0.74**	**0.81**	**0.54**	**0.38**

DISCUSSION

The author's intention was to show the possibility of a simple but very applicable multi-criteria approach for the comparative evaluation of the attractiveness of rural guesthouses in Croatia. By applying the MCDM approach, they assessed that rural guesthouse number 3 (RGH 3) has the highest potential to attract tourists offering the highest value for money. In this way, they confirmed the first research hypothesis that multi-criteria methods enable a simple and unambiguous assessment framework of the attractiveness of rural guesthouses. Why make a multi-criteria decision about a holiday destination at all? Studies suggest that families prefer to spend their vacations together and that joint decision making is the predominant method of planning these shared experiences (Fodness, 1992; Kang and Hsu, 2005). Although the decision about the holiday destination is dominated by the wife's influence (Srnec et al., 2016), all family members participate in the decision-making process and their preferences often do not match (Jia et al., 2023). Another reason for using MCDA is that not every criterion is equally important in the process of evaluating and ranking the tourism potential of a destination's resources, as Sánchez Rivero et al. (2016) found. Under ideal conditions, in the context of the "democratic family process", the decision to take a holiday can be made using a multi-criteria approach, which has been shown in this paper. There are a variety of factors in the decision to take a holiday, some of which are mutually exclusive. The results of this paper differ from the conclusions of the paper by author Martin (2014), according to which price is the decisive factor when choosing a holiday. According to the results of this study, price, with its 21% impact on overall attractiveness, is only the third most important of the five decision criteria considered when choosing a guesthouse, according to the experts. Although the "winner" in this study is the rural guesthouse with the lowest price per night, the second place goes to the rural guesthouse with a price significantly higher than all other houses surveyed, and even 90 percent higher than the cheapest house. Thus, the second research hypothesis, which stated that lower-priced facilities are not necessarily perceived as more attractive, is confirmed. However, this assessment should be reconsidered, as the experts surveyed are people with a higher purchasing power than the average consumer in Croatia, and their income elasticity is lower than that of potential tourists.

A key limitation of this study lies in the reliance on expert judgment to assess the importance of attractiveness criteria, which inherently introduces a degree of subjectivity. Although the involvement of eight experts helped to mitigate this issue, it is not possible to eliminate subjective bias entirely. This challenge is common across all multi-criteria decision-making (MCDM) approaches that depend on expert evaluations. For future research, it would be advisable to validate the findings by incorporating the perspectives of actual tourists. Such an approach could enhance the robustness of the model and provide a more accurate reflection of tourist preferences.

CONCLUSION

Given the declining economic importance of agriculture in rural areas across Europe, the service sector, particularly rural tourism, has emerged as a promising alternative for economic development and job creation. Understanding tourists' perceptions of destination attractiveness is essential for effective destination management and marketing.

The study successfully demonstrated the applicability of the multicriteria approach for evaluating the attractiveness of rural guesthouses by implementing it on selected properties in continental Croatia. Instead of relying on generic lists of attractiveness factors, this approach identifies and prioritizes key elements that attract tourists to rural accommodations.

In this context, the research results show that the low price of accommodation is not decisive for the attractiveness of the property, but rather its location and facilities.

This suggests that rural accommodation prices are less sensitive to income fluctuations than those targeting price-conscious travelers and are therefore more resilient to periods of recession, which have had a significant impact on Croatian coastal tourism.

The results of this study provide practical value to researchers, managers, and policymakers by offering a structured and quantifiable MCDM framework for assessing the attractiveness of rural guesthouses. The model also helps rural guesthouse owners optimize their investments, such as improving equipment and location-related amenities, rather than resorting to aggressive price reductions.

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ECONOMIC EFFECTS OF RURAL TOURISM AND RESIDENT ATTITUDES IN THE SERBIA–CROATIA DANUBE BORDER REGION

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Abstract

This study investigates how residents perceive the economic impacts of rural tourism in the Danube border area between Croatia (Sarvaš, Bijelo Brdo, Dalj, Aljmaš, Erdut) and Serbia (Neštin, Susek, Sviloš, Banoštor, Čerević). The aim was to evaluate resident attitudes toward tourism's contribution to income, employment, living standards, and entrepreneurship, and to explore whether these perceptions can inform future cross-border cooperation. A survey of 417 inhabitants was conducted using an adapted Tourism Impact Attitude Scale (TIAS), and Pearson's chi-square test was applied to assess gender differences. The findings reveal strong support for tourism as an economic driver: most respondents reported higher household income, improved living standards, and attractive employment opportunities linked to tourism. Significant gender differences emerged in financial and employment-related aspects, underscoring the need for targeted education and women's empowerment. Overall, the results suggest that positive economic attitudes form a strong foundation for sustainable rural development and provide a rationale for EU-funded cross-border initiatives.

Keywords: rural tourism, resident attitudes, TIAS, economic indicators, Serbia, Croatia, Danube

INTRODUCTION

Tourism can be said to be a multidimensional phenomenon (Mair, 2006; Panić et al., 2024) that has a great economic impact on the destinations where it develops (Gautamn & Bhalla, 2023; Roodbari & Olya, 2023), which primarily means that it represents a driving force of economic development (Cândea, 2009). Considering its multidimensionality, its political importance is also clear, i.e. the influence it can have on neighboring countries.

By strengthening one side, the other side is also strengthened, especially if they are located in similar locations in terms of territory and resources. The countries located in the border areas of the EU are particularly important because there are numerous pre-accession funds for them. Such countries are Serbia and Croatia. As it is a process that has a direct impact on the environment (de Boer & van Dijk, 2016), it is extremely important to develop those forms of tourism that are responsible for the environment – sustainable (Crăciun et al., 2022). Such a form of tourism is rural tourism (An & Alarcon, 2020; Ruiz-Real et al., 2022).

According to Karthik (2023), rural tourism is an important component of the integral and sustainable development of villages. Also, rural tourism (Wardana et al., 2020) represents a significant factor in encouraging the development of a large number of activities in villages, especially old crafts and other non-agricultural activities inherent to villages (Chen et al., 2023). Through the development of rural tourism, the depopulation of rural areas is slowed down (Arslanturk et al., 2011), while women in the villages are also empowered, as a particularly sensitive category of the rural population (Maksimović et al., 2019). The most important economic function in villages, due to the development of rural tourism, is reflected in the creation of new jobs and the strengthening of the entire economy (Balaguer & Cantavella-Jorda, 2002; Kumar et al., 2020).

There are numerous advantages of spending free time in the villages, but some of the main ones are relaxation, recreation, and prevention (Einali et al., 2023), because health as a motive is undoubtedly the most important. All this benefits from a healthy rural environment, gastronomy, and niche forms of tourism such as api-tourism, sports-recreational, bird watching, photo hunting, fishing, gastronomy and wine tourism (Vuković et al., 2019; Gao & Wu, 2017; Obradović et al., 2023). But one thing is certain: all these forms of tourism represent sustainable forms of tourism, which need to be nurtured and developed in the future.

The concept of sustainability in tourism (Germanovich, 2020; Wijijayanti et al., 2023) is used in an effort to define a state of balance between tourism development that brings economic benefits and natural and cultural resources (Canh & Thanh, 2020), especially intangible cultures such as traditions and customs of a nation, various games, stories, legends, dance and traditions in general (Petelca & Garbuz, 2020). On the other hand, sustainability is based on three pillars that, with the help of its indicators (An & Alarcon, 2020), measure the state in which the destination is located. These are economic, sociological and ecological indicators of sustainability. In this study, special emphasis is placed on economic indicators of sustainability (Blake, 2009).

Recent scholarship has also highlighted the role of cross-border cooperation as a crucial dimension of sustainable tourism. Studies show that collaborative projects create new opportunities for regional development (Pardo et al., 2024), strengthen institutional capacities (Kropinova, 2021), and directly contribute to achieving the UN Sustainable Development Goals

(Ferrer-Roca et al., 2022; Jelinčić et al., 2019). In Central and Eastern Europe, Interreg projects have demonstrated that border areas such as Croatia and its neighbors can benefit substantially from joint tourism strategies (Benassi, 2025). This body of research provides the theoretical background for linking cross-border cooperation with rural tourism development in the Serbia–Croatia Danube borderland.

The analysis focuses on the economic impacts of tourism on the local and regional development of rural destinations in bordering parts of Croatia (Sarvaš, Bijelo Brdo, Dalj, Aljmaš and Erdut) and Serbia (Neštin, Susek, Sviloš, Banoštor and Čerević), with the aim of using the identified effects of tourism for innovative solutions and cross-border cooperation projects. The availability of IPARD funds enables the strengthening of rural destinations and contributes to their sustainable development in the future as well (Fotiadis et al., 2019). The European Union pays considerable attention to the development of rural tourism, which creates numerous opportunities for the sustainable economic development of villages (Panić et al., 2024). The focus of diversification within the IPARD funds is precisely rural tourism, especially because of the long tradition and rich cultural heritage in the observed destinations. These traditions complement each other and together still have much to show and offer to tourists from all over the world. Moreover, the rural destinations of Serbia and Croatia in the observed area are also characterized by the course of the Danube River, which, through EuroVelo 6, brings numerous cycling tourists as a highly desirable category (Perić et al., 2019; Sun et al., 2023). Rural destinations are sustainable and responsible in every sense. In this context, funds should be used to invest in tourism infrastructure, superstructures, various promotional activities and marketing, but also human resources, especially in the field of education in order to strengthen women and their entrepreneurship (Möller, 2012; Nordbø, 2022).

The explicit aim of this study is to examine residents' attitudes toward the economic effects of rural tourism in the Serbia–Croatia Danube border area and to evaluate whether these perceptions can serve as a foundation for strengthening cross-border collaboration and designing future EU-funded projects. Accordingly, this study asks: "What is the unique contribution of tourism to rural destinations, and how can cross-border cooperation be strengthened in explaining the behavior and attitudes of residents under the influence of sustainable rural tourism development?" On the basis of prior literature and the specific context of the Danube borderland, it is assumed that the primary outcome of rural tourism is sustainable economic stability of the community through the creation of new jobs, innovative solutions, education, and the empowerment of women's entrepreneurship. This rationale leads to the formulation of the basic hypothesis H1, namely that residents perceive economic indicators of rural tourism development (income, employment, living standard, entrepreneurship) as key drivers of sustainable rural development, and that these positive perceptions may provide a rationale for future cross-border cooperation projects.

RESEARCH METHODOLOGY

The well-established Tourism Impact Attitude Scale (TIAS) (Lankford & Howard, 1994a) was selected as the primary instrument. This scale was originally designed in 1994 by American scholars Samuel W. Lankford and Dennis R. Howard, who laid the foundation for measuring residents' attitudes toward tourism impacts. To confirm the validity of the scale, the authors revisited its applicability in different cultural contexts (Lankford & Howard, 1994b), and later applications (Lankford et al., 1994) demonstrated that the scale could be successfully adapted across diverse socio-economic and geographical environments. More recent research has also confirmed TIAS as a flexible and adaptable framework for analyzing residents' perceptions in rural and cross-border settings (Andereck & Nyaupane, 2011; Nunkoo & Ramkissoon, 2012; Nordbø, 2022), which justified its use in the case of Croatia and Serbia.

A total of 417 residents from the Pannonian plain were surveyed: Slavonia (Croatia, EU: Sarvaš, Bijelo Brdo, Dalj, Aljmaš, Erdut) and Bačka and Srem (Vojvodina, Serbia: Neštin, Susek, Sviloš, Banoštor, Čerević). Respondents expressed their views on a five-point Likert scale ranging from "completely agree" (5) to "completely disagree" (1), which allowed for the measurement of intensity of agreement with each statement. The research design aimed to assess the extent to which tourism affects local development in rural destinations and to explore whether examples of good practice in one place can influence development in another. Particular importance was attributed to the border position between Croatia (EU) and Serbia (pre-accession country), which provides opportunities for future cross-border projects under EU funding schemes.

The area of Slavonia is characterized by gastronomic tourism, events, the Erdut wine route, religious tourism, and the Kopački Rit Nature Park, while Bačka and Srem in Serbia are notable for Fruška Gora vineyards, monasteries, api-tourism, and wineries. This diversity of attractions provided a common ground for comparing residents' perceptions across both sides of the border.

From the original TIAS scale, 10 variables were selected. The selection was guided by two criteria: (1) theoretical relevance to economic indicators of sustainability and (2) contextual suitability for rural border communities in Slavonia and Vojvodina. This selective adaptation is consistent with earlier studies that recommend tailoring TIAS to the purpose and cultural context of each research setting. Variables unrelated to the economic dimension (e.g., social or environmental impacts) were excluded to maintain focus on the study aim. The final set of ten items therefore specifically measured: (a) household income generated by tourism, (b) improved living standards, (c) job creation and employment attractiveness, (d) local entrepreneurship and shop growth, and (e) perceptions of tourism's role in community development. These ten variables were translated, linguistically adapted, and tested for cultural relevance in Croatian and Serbian before data collection.

Factor 1 covered benefits of tourism development for individuals and the local community (e.g., tourism as a leading economic role, income, living standard, jobs, entrepreneurship). Factor 2 was defined as "concern for local tourism development" and reflected broader community-level benefits (e.g., resources for tourism, tourism's role in the economy, municipal support, encouragement of tourism, tourism as the main branch).

The independent variable used in the methodology was gender. Gender was chosen because patriarchal structures strongly shape rural societies in the Serbia–Croatia border region, influencing access to income, employment, and entrepreneurship opportunities. Prior studies (e.g., Nordbø, 2022) emphasize that gender is a key determinant of how residents perceive and benefit from tourism development. This theoretical and contextual relevance justified testing gender as the independent variable in relation to the selected economic indicators.

To test relationships between gender and economic indicators, Pearson's chi-square test was applied to each variable separately. Each test compared male and female responses to determine whether statistically significant differences exist in perceptions of income, living standards, employment, and entrepreneurship. A p-value lower than 0.05 indicated statistical significance, while values above 0.05 suggested no significant gender-based differences.

RESULT AND DISCUSSIONS

Table 1 shows the gender distribution of respondents: 278 men (66.7%) and 139 women (33.3%). All respondents expressed their opinions on a five-point Likert scale ranging from "Completely agree" to "Completely disagree." This distribution confirms that the sample includes both male and female perspectives, although men are more represented, reflecting the patriarchal characteristics of rural communities in the region (Halpern, 1996).

Table 1 Gender

		Frequency	Percent
Valid	Male	278	66,7
	Female	139	33,3
	Total	417	100,0

The first group of items examines the perceived economic benefits of tourism development. Consistent with Fallon and Schofield (2006) and Wall (1997), the results support the concept of tourism-led development, whereby tourism is not only a consequence of economic growth but also an important driver of local economic transformation.

Future role of tourism. A vast majority (412 out of 417) agreed that tourism will play a leading economic role in their settlement. The chi-square test ($\chi^2 = 6.178$, $p > 0.05$) revealed no significant gender differences, suggesting broad consensus across men and women. This finding corresponds with earlier research that positions tourism as a core pillar of sustainable rural development (Boley et al., 2018; Lindberg et al., 2021).

Financial benefits. 360 respondents reported having more money thanks to tourism. However, gender differences were significant ($\chi^2 = 13.691$, $p < 0.01$). Women were less likely to report direct financial gains, reflecting unequal access to economic opportunities in patriarchal rural societies. This highlights the need for targeted empowerment programs to ensure that women benefit equally (Nordbø, 2022).

Living standards. 336 respondents strongly agreed that tourism improved their standard of living. Significant gender differences ($\chi^2 = 32.726$, $p < 0.001$) showed that men reported stronger improvements, possibly due to greater participation in higher-value tourism-related employment and entrepreneurship.

Employment opportunities. 351 respondents completely agreed that jobs created by tourism are attractive. The chi-square test ($\chi^2 = 60.343$, $p < 0.001$) indicated strong gender disparities, reflecting uneven distribution of labor roles. Women remain concentrated in hospitality and service-related positions, while men dominate in management, infrastructure, and outdoor activities (Schrock & Schwalbe, 2009).10

Entrepreneurship and shops. 337 respondents agreed that tourism has stimulated local entrepreneurship by increasing the number of shops. Significant gender differences (χ^2 =

28.681, $p < 0.001$) suggest that women perceive fewer entrepreneurial benefits, pointing to barriers in access to business opportunities.10

Table 2 Residents' perceptions of economic effects of rural tourism and gender differences (Pearson Chi-Square test results, N = 417)

Item	Response distribution (Male/Female)	Total	Pearson Chi-Square (df, p)
Tourism will play a leading economic role	Completely agree: 204/87; Agree: 70/51; No changes: 4/1	417	$\chi^2 = 6.178$, df = 2, p = 0.046
I have more money thanks to tourism	Totally agree: 251/109; Agree: 23/29; No changes: 4/1	417	$\chi^2 = 13.691$, df = 2, p = 0.001
Tourism has improved my living standard	Strongly agree: 243/93; Agree: 28/45; No changes: 7/1	417	$\chi^2 = 32.726$, df = 2, p = 0.000
Jobs created by tourism are attractive	Completely agree: 259/92; Agree: 15/47; No changes: 4/0	417	$\chi^2 = 60.343$, df = 2, p = 0.000
The number of shops has increased	Completely agree: 244/93; Agree: 28/43; No changes: 6/3	417	$\chi^2 = 28.681$, df = 2, p = 0.000

The second group of items reflects perceptions of community-level tourism development and its broader socio-economic role. Tourism potential. 282 respondents completely agreed that their settlement has resources to become an attractive tourist destination. No significant gender differences ($\chi^2 = 4.936$, $p > 0.05$) suggest shared recognition of local potential.

Tourism's role in the community economy. 304 respondents completely agreed that tourism plays an important role in the local economy. Again, no gender differences were found ($\chi^2 = 2.208$, $p > 0.05$), pointing to broad acceptance of tourism's contribution to economic stability.

Government support. 272 respondents strongly agreed that municipal government support for tourism is justified. No gender differences ($\chi^2 = 2.307$, $p > 0.05$) confirm wide endorsement of local authority involvement in tourism development.

Encouraging tourism development. 332 respondents strongly agreed that tourism should be actively encouraged. Gender differences were significant ($\chi^2 = 44.747$, $p < 0.001$), with women showing lower levels of agreement. This highlights the need for better education and empowerment initiatives to increase women's participation and recognition of tourism's potential benefits. Tourism as the main economic branch. 331 respondents completely agreed that tourism should become the main economic branch in their settlement. Significant gender differences ($\chi^2 = 15.693$, $p < 0.001$) showed that women are less likely to perceive tourism as the central economic activity, pointing again to structural barriers.

Table 3 Residents' perceptions of community-level tourism development and gender differences (Pearson Chi-Square test results, N = 417)

Item	Response distribution (Male/Female)	Total	Pearson Chi-Square (df, p)
My settlement has resources to become an attractive destination	Completely agree: 178/104; Agree: 88/31; No changes: 12/4	417	$\chi^2 = 4.936$, df = 2, p = 0.085
Tourism plays an important role in the community economy	Completely agree: 209/95; Agree: 59/38; No changes: 10/6	417	$\chi^2 = 2.208$, df = 2, p = 0.331
The municipal government is right to support tourism	Completely agree: 175/97; Agree: 84/35; No changes: 18/7; Disagree: 1/0	417	$\chi^2 = 2.307$, df = 3, p = 0.511
Tourism development should be actively encouraged	Completely agree: 246/86; Agree: 28/52; No changes: 4/1	417	$\chi^2 = 44.747$, df = 2, p = 0.000
Tourism should become the main economic branch	Completely agree: 235/96; Agree: 39/42; No changes: 4/1	417	$\chi^2 = 15.693$, df = 2, p = 0.000

The findings demonstrate consistently positive attitudes toward tourism as a driver of rural economic development and community progress. However, statistically significant gender differences appear in several dimensions (income, living standards, employment, entrepreneurship, and perceptions of tourism as the main economic branch). These disparities reflect enduring patriarchal structures in rural communities and confirm the necessity of policy measures targeting women's empowerment, entrepreneurship support, and training programs.

At the same time, the study relied primarily on descriptive statistics and chi-square tests, which are suitable for identifying basic patterns and gender differences but limited in exploring latent constructs or causal relationships. Future research should therefore apply multivariate techniques such as exploratory and confirmatory factor analysis, regression modeling, or structural equation modeling. These approaches would enable a deeper understanding of the underlying structure of residents' attitudes, their interconnections, and the extent to which demographic or contextual variables shape perceptions of rural tourism development. In this sense, the present study should be regarded as an exploratory step that provides a valuable baseline and opens pathways for further empirical validation across different cultural and geographic contexts. Ultimately, strengthening cross-border cooperation and ensuring more inclusive participation—particularly of women—represent key prerequisites for harnessing the full potential of rural tourism as a sustainable driver of economic and social development in the Serbia–Croatia border region.

CONCLUSION

Since the border areas mentioned are geographically very similar, it is necessary for them to learn from each other and to use the opportunity of joint projects to improve tourism on both sides. The comparison of residents' responses shows that Croatian villages reported higher levels of tourism-related income, employment opportunities, and entrepreneurial activity, which indicates that rural tourism is more significantly developed in Croatia compared to the observed villages in Vojvodina (Serbia), despite the almost identical resource base. In this context, Croatian villages can serve as "examples of good practice" for their Serbian counterparts, and numerous programs and funds are available to support such collaboration.

The research aimed to capture the attitudes of the rural population regarding tourism development and its impacts on their communities and personal lives. The results revealed positive perceptions across all four economic indicators measured in the study—income, employment, living standard, and entrepreneurship (Tables 2 and 3). This provides support for H1, namely that residents perceive economic indicators of rural tourism development (income, employment, living standard, entrepreneurship) as key drivers of sustainable rural development, and that these positive perceptions may provide a rationale for future cross-border cooperation projects. While the findings cannot be taken as definitive proof due to methodological limitations, they demonstrate that residents perceive tourism as an important driver of economic sustainability in rural destinations and highlight the potential for collaborative projects supported by EU and pre-accession funding.

From a theoretical perspective, the study contributes to the literature on tourism-led development and sustainability by showing how residents in borderland rural contexts perceive economic stability, job creation, entrepreneurship, and improved living standards as foundations for long-term development. These insights enrich the understanding of how attitudes toward tourism can support cooperative models in regions characterized by shared resources and cultural similarities.

From a practical perspective, the findings suggest that policymakers and local stakeholders should prioritize investment in rural tourism infrastructure, training programs, and the empowerment of women through entrepreneurship initiatives. Positive resident attitudes, if effectively harnessed, can provide a strong basis for designing cross-border cooperation projects aligned with the EU Strategy for the Danube Region (EUSDR) and the UN 2030 Sustainable Development Goals.

Research has shown that the local population is aware of the benefits brought by the development of tourism in their places. The consistently high levels of agreement (above 80% for most items) demonstrate that residents view tourism as a source of income, jobs, improved living standards, and local entrepreneurship. By positioning these findings as exploratory, the study offers a baseline for further empirical research using multivariate analysis, which would allow more robust testing of residents' attitudes and their determinants. In addition to the local population, the development of tourism and cross-border cooperation is also strongly supported by the European Union, which has allocated more than €400 million to Serbia since 2004. Special emphasis should therefore be placed on projects related to rural development and rural tourism, as a sustainable and responsible form of tourism that strengthens not only border regions, but also broader processes of European integration.

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URBEX (URBAN EXPLORATION) AND PSEUDOURBEX: WHAT IS THE ACTUAL DIFFERENCE?

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Abstract

Urban Exploration (URBEX) is a relatively modern leisure activity that is directly related to the exploration of abandoned and unused buildings, sites and other results of human activity. Urbex is often presented as the exploration of modern ruins and is characterized by a set of unwritten rules to be followed by the so-called explorers (urbexers), which defines urbex as such. Urbex is a phenomenon on the border of the law, but it is not comprehensively scientifically elaborated, especially in the field of typology and defining what urbex is and what it is not. Therefore, the aim of this paper is to elaborate the theoretical concept of urbex within the limits of scientific work, including the determination of its forms and manifestations, and within these, to establish key parameters for identifying the differences between authentic urbex and pseudo-urbex, which in the true sense of the word is not urbex as such. Defining the intermediate form between urbex in the true sense of the word and the absence of urbex is essential for further research, as it allows specifying the subject under investigation. The specification of pseudourbex is an autistic innovation and neologism and is based on a factual confrontation and synthesis of the rules of urbex and its types and forms, which is combined with the author's own knowledge. The topic of pseudourbex itself is not contentious, but is open to further scientific discussion.

Keywords: urbex; urban exploration; urbexer; pseudourbex; rurex

INTRODUCTION

Urbex, Urban Exploration, is an activity in which people (out of enthusiasm for the cause) visit and explore abandoned, inaccessible or forgotten objects and buildings. It is a phenomenon of the last decades, which has the potential for further development and can become an interesting factor in the growth of tourism.

The aim of this article is to establish the difference between urbex and pseudourbex within the limits of scientific work based on the synthesis of knowledge about what urbex should be, in which categories the research can be carried out and what rules are inherent to it. Many people, consciously or unconsciously, do not carry out urban exploration in the true sense of the word, and there is a moral and factual need to clearly distinguish these exploratory activities from each other and to set their content straight. The aim of this thesis is thus to reflect the current trends of the growing popularity of urbex and the human nature to be fashionable, unconventional and popular. In many cases, this is not true urbex and the presented activity only pretends to be one (for various reasons). The contribution also responds to the own scientific need to precisely define the object of research, which can be generalized for further professional study of the issue of urbex. There is a factual difference between urbex and pseudourbex, which can make the results of future studies, scientific research and analytical works imprecise and limit reliable results, where this will not be strictly distinguished.

The motivation of this contribution is therefore to name a group of explorers who do not fulfill the attributes of a “true – authentic” urbexer and for this reason behave in a different way. Below in the text, a new terminological name is determined, where pseudourbex is a neologism. The introduction of the term pseudourbex has expanded the division of human society into three research subjects, in relation to urban exploration, namely urbtexers, pseudourbexers and subjects not conducting exploration. Let us add that the part of the text devoted to the typology of the research is completely new, as is the use of the term pseudourbex, including the attempt to define it and confront it with the authentic urbex.

The form of the contribution is specific; it is neither purely a traditional review paper nor a contribution containing primary research.

The contribution is structured traditionally, the Introduction is followed by Literature, which focuses on approaching the issue of urbex more comprehensively, so that the overall context of urbex is better explained to the general public, because the very intention to introduce a new designation for "partial" urbex has not yet been presented. The following is a part dedicated to the Methodology, here it should be noted that the effort to distinguish the survey into two groups is the author's own invention and has no support in other scientific studies and texts. In the Results section, the text is divided into three substantive parts. The first is the definition of the rules of conduct during urbex created by the multi-source synthesis on which urbex is based; the second part is devoted to the typology of the survey, because not every survey coincides with urbex survey; and in the last part, based on a combination of previous knowledge, pseudourbex is actually distinguished from urbex. This also makes the definition of urbex as such more precise. The Discussion section is omitted, which can be explained by the absence of confrontational texts and studies. The conclusion summarizes the most important conclusions resulting from the presented contribution.

LITERATURE

Urbex is a targeted exploration or visit to abandoned buildings, complexes and various objects that have been created by human activity and which are currently abandoned, empty, decaying and do not fulfil their original useful (practical) function (Robinson, 2015; Kuźma, 2015; Kovacs, 2023; Duda et al., 2024). Alternatively, urban exploration can be replaced by terms such as modern ruin exploration or urban exploration, where the specific purpose of this activity is to get a personal experience of the site and to record it visually in the form of photography[2] or video footage (Lesné, 2022; Garret, 2016; Mott and Roberts, 2014). The aim of urbex is therefore to document abandoned and forgotten parts of the urban structures of human settlements (urban landscapes) and at the same time to "enjoy" the sense of adventure of visiting these unique spaces and places (Roult et al., 2018). The popularity of urbex has increased significantly in the last two decades (Turečková and Dolák, 2025) and has given rise to its own global subculture (Kindynis, 2017) and a number of local urbex communities. This is linked to the significant growth in interest in abandoned properties (Borseková, et al., 2015) or other results of human activity and their non-random, planned and unique visit (Radford, 2020, Duda et al., 2024; Garrett, 2012) in particular during specific eras (Hála et al., 2023). Lesné (2022) emphasizes that the importance of scientific research into urbex has a parallel in better understanding cities, urban spaces, and urban societies. Urbex is limited by the fact that it is an activity "on the edge of the law", where violations of civil law in particular are very common (Duda et al., 2024; Duda et al., 2025; Fulton 2017; Lyden 2013) and the exploration itself is in many cases dangerous and risky.

Urbex is no longer just a modern, leisure time activity, but has transformed into an object of development of a specialized (non)consumer, authentic, more allocentric and unusual tourism industry[3] (Gonzalez, 2022; Lennon and Foley, 2000; Robinson, 2015; Fraser, 2012; Steiner and Reisinger, 2006) and its popularity is taking on global proportions (Robinson, 2015). And urbex has also been extensively described through the lens of tourism. It is considered a type of “adventure tourism” for those who like to take risks (Lebreton and Gibout, 2017) or “interior tourism” (Nieszczerzewska, 2018) for those interested in discovering, learning and rediscovering themselves. Urbex also reflects current trends in tourism, with a renewed interest in ruins (Le Gallou, 2018). But it has also become a purely fashionable affair, which has a

[2] Often having the character of an artistic creation after additional technical adjustments and modifications.
[3] Also referred to as urban tourism.

parallel in the growing promotion of urbex on social networks and other media (Rosa, 2013; Lavrenova, 2024) and its substance and content have been altered in a number of cases. The original meaning of urbex, i.e. to experience (adrenaline) adventure (Paiva, 2008; George, 2011) associated with the subjectively perceived excitement of learning something new, exciting, mysterious and dangerous (associated with feelings of fear, anxiety, stress, sadness, depression, etc.) (for more see Cameron, 2008), is also associated with an interest in the history and culture of the site[4] and requires the explorer to behave responsibly and considerately (see Code of Ethics and Urbex rules below). It is therefore not uncommon today that many explorers are not urbexers in the true sense of the word. Urbex is an activity combining knowledge and interest in history (Stones, 2016), architecture (Craggs, et al., 2013), culture, geography (Garrett, 2010), travelling, sport, technology (Pinder, 2005); it is a sociological topic (Prescott, 2011) with psychological content (Radford, 2020) with the possibility of presenting itself within journalism and art. The urban places and locations are relatively easy to access in terms of their number and forms (see the chapter on Typology of the exploration) combined with an acceptable commuting distance. Finally, let us add that a systematic literature review and bibliometric analysis on urbex was published by Lesné (2022).

METHODOLOGY

The methodological framework of this purely theoretical and conceptual text is defined primarily by a search of professional and popular publications and their critical analysis in the sense of a factual confrontation of available information related to the content of this paper. In the case of the developed typology of urbex activities elaborated in a separate subchapter, it was based mainly on own observation and own knowledge and experience[5], as a similar or alternative categorization was not found by the author in the framework of his own scientific and research activities[6], i.e. there are no other articles that can be relied upon when categorizing forms of urbex and creating a typology. Nevertheless, the author believes that his typology of different forms of approach to the exploration of "modern ruins" meets the condition of reality

[4] Urbex is also about the atmosphere of the place, where time shifts to another dimension.
[5] At present, it is not possible to rely on other scientific knowledge that can be adopted, therefore the author bases his work on his own observations in the role of an urbexer and a researcher who has been trying to publish on the given topic (for more than 3 years); the author combines this knowledge from information from the media and social networks, as well as from the author's own research, which is currently being carried out (see https://forms.gle/L71rCjDqeoamAeoy6).
[6] The topic of urbex is also often treated in a form other than the usual scientific academic texts. This is reflected in the references where popularization texts are also referenced.

and relevance, is logical and factual, and within the basic shapes and forms of the urbex, including the behaviour of the explorers themselves, relatively complex as well. The author also believes that the presented typology has its scientific potential and can be further expanded, corrected or refined.

In order to fulfil the stated goal of determining the key parameters for interpreting the differences between true urbex and pseudo-urbex, it is necessary, in addition to categorizing the different forms of research, to define the rules for urbex (the so-called code of ethics of urbex), which are supposed to define it in terms of the behaviour of the researchers themselves. Both are then also confronted with a definition of what urbex should be[7]. By critically linking these three areas of content, elaborated in the subchapters of this paper, it is possible to establish, from a professional-scientific point of view, the mutual differences in the implementation of exploration activities and to concretise the content of authentic urbex as such.

Both deductive and inductive approaches have been reflected in the processing of the article, with the key being the substantive comparison and synthesis of partial findings formulated in response to the stated objective. The formulation of the differences between urbex and pseudourbex take the form of a generalized but not definitive statement. The text is accompanied by the author's own photographs which are primarily illustrative.

RESULTS

This chapter is divided into three parts. The first subchapter defines as comprehensively as possible 11 rules of urbex, which regulate the behavior of an urbexer during his own exploration. Logically, anyone who does not behave according to them is not an urbexer. The

[7] The definitions of urbex themselves are often very vague and a specific clear specification of urbex itself is actually missing. In particular, the definitions lack information about ethics and standards of behavior, which, on the other hand, are contained in the urbex code of ethics. Let us give a few examples of traditional definitions: (1) Paiva (2008) has described: urbex means different things to different people. For some, it's about infiltrating a city's storm drains and subway tunnels. For others, it's climbing bridges and radio towers. Generally speaking, though, urbex is the exploration of TOADS (Temporary, Obsolete, abandoned and Derelict Spaces). The essential components of the hobby include a disused site and a means of capturing images (photography or video) to document the hobbyist's journey through that particular space. The resulting photographic images may then be collected and potentially shared with selected audiences. The urban explorer may have multiple motivations for pursuing this hobby, often thrill seeking and, importantly, capturing or documenting evidence of a visit. (2) Kindynis (2016) urbex is the practice of researching, gaining access to, and documenting forbidden, forgotten or otherwise off-limits places, including abandoned buildings, high-rise construction sites and infrastructure systems. (3) According to Garrett (2014) urban exploration is a practice of researching, rediscovering and physically exploring temporary, obsolete, abandoned, derelict and infrastructural areas within built environments without permission to do so. (4) And last one: Urbex – from urban exploration – is a leisure activity that involves scouting abandoned and/or neglected infrastructure with the aim of touring and sometimes photographing it (Lesné, 2022).

rules described here are the result of a synthesis of rules stated across the urbex spectrum, both by experts and urbexers themselves. Their list was not always uniform and complete in terms of its factual content. Now the rules should be as complete as possible, also in terms of their concretization and alternative explanation. The second part is devoted to the typology of urbex forms, the creation of which was written more in the previous part of the article. This typology is not final, but even in this form it is methodologically transferable to further research. By combining both topics, it is then possible to define both groups of explorers in the context of urbex and to determine the differences between urbex and pseudourbex.

Urban exploration rules vs. explorer behaviour

Urbex activities are fully shaped by the behaviour of the explorers themselves, who may or may not behave in accordance with the unwritten rules that institutionalise urbex to some extent. Given that the rules and instructions for behaviour in urban exploration are not legitimised in a single and binding code of ethics, but are given in various forms and in indirect reflections, there is already room for the intentional or unintentional transition of the rules to the benefit of each urbexer. However, many urbexers generally honour and respect the generally set rules, guidelines and recommendations. There are 11 most frequently mentioned rules, including the basic rule (Garett, 2014; Cuba, 2023; Půlpán, 2020; Chválová, 2021; Ninjalicious, 2005; Faiglová and Havlíková, 2014; Lang, 2008), which is "leave only footprints, take only photos" or "don't destroy or take anything, just photos and experiences". (e.g. Waitt and Cook, 2007). The other 10 rules are presented here as part of a logical and substantive synthesis of several sub-sources providing guidance and recommendations for implementing the urbex. These are:

(1) respect laws and property rights, respect privacy and property (don't trespass without permission), if a place is inaccessible, don't create entrances, if an entrance exists, leave it in the condition you discovered it;

(2) safety is a priority, don't get into situations that can endanger life and health (be aware of the safety risks and pitfalls of urbex sites, be prepared for them and don't take unnecessary risks, be aware that there may be other people or animals in the building);

(3) be cautious and find out as much information as possible about the location and the area you are exploring, avoid risky and unstable places;

(4) be discreet, the intention of the urbex is to be as unobtrusive as possible, which means not drawing attention to the ongoing research and also to the fact that the site is relevant

to the urbex (the fewer "uninterested" people know about the site, the longer it will last);

(5) be prepared in terms of appropriate equipment in case of unexpected obstacles (first aid kit, helmet, flashlight, etc.);

(6) don't take anything away (respect the owners' property, don't steal), don't damage anything (e.g. don't move furniture, don't be a vandal), don't smuggle anything (rubbish), keep the place exactly as you found it;

(7) share photos and experiences responsibly with respect for the site and its history (do not provide information that could lead to damage or misuse of the site), urbex sites are not shared publicly;

(8) urbex is not a commercial affair on which one should prosper financially;

(9) perceive the atmosphere, genius loci, honour the history and culture of the place, urbex is not only about photo (video) documentation of the location, but especially for the experience;

(10) respect other urbexers, their right to privacy and their right to explore the space in its authentic form.

These rules should be noted and followed by all who subscribe to urbex and consider themselves credible urbexers. These rules are recognized by a wide group of interested parties, including both practitioners and researchers, and the requirement to comply with them is also referred to by the above-mentioned authors of the partial formulations of the rules (see above), as well as by, for example, Israel (2022) and Fulton (2021). However, along with the media coverage and popularisation of urbex, when it is slowly becoming a mainstream issue within specific forms of leisure activities, there is a growing group of people who do not do so and who, through various forms of behaviour, devalue places (objects of urbex) (see Merrill, 2014; Stonington, 2014).

Typology of “urban” explorations

The absence of a distinction between the different forms of approach to exploration has led to the development of a classification of characteristics closely associated with this activity[8]. By

[8] Due to the fact that there is no similar typology, the one presented here was elaborated by the author of the article. It is their own logical concept, which is based on their experience (mainly in the form of observation) combined with the knowledge obtained in the search of professional sources and other publications.

combining the information above with the approaches to exploring the results of human activity presented here, it is possible to identify ex post the authentic – the real urbex from the pseudo urbex, which is not an urbex in the true sense of the word (see next chapter). The typology of the exploration of "modern ruins", i.e. the determination of its forms, aspects and manifestations grouped into logical and substantive categories, is presented in the table below (Tab. 1). This typology specifies possible forms of exploration typical of both urbex and pseudourbex. It is in their further articulation that we are able to determine forms typical of authentic urbex or of the pseudourbex formulated here. It should be added here that the categorization of urbex presented here is not necessarily definitive; the intention was to specify the basic types of exploration that are most recognizable in the context of urbex activities.

Table 1 Typology of the exploration

by the object of the exploration	relating to properties (brownfields: real estate* or infrastructure remains**) or other results of human activity (wrecks of planes, ships, trains) * abandoned hospitals, schools, hotels, factories ** deserted railway lines, runways
by the motive for the exploration	unintentional, purposeful (conscious)
by the type of the building inspection	internal, external, complex (internal and external)
by the legitimacy of the exploration	legitimate (with consent), unauthorized, free
by the number of explorers	individual, collective (in a group)
by the frequency of explorations	regular and relatively frequent, occasional (sporadic)
by providing information about the object	personal (private), shared
by the reason of the exploration	non-profit, commercial

Source: own

By the very nature of the object of the exploration, it may be a property or other result of human activity. In most cases, the object of an urbex is a brownfield site, which represents abandoned and neglected real estate in the form of buildings, structures, sites, open spaces, land, physical roads etc., which previously fulfilled a specific economic function, but which has been discontinued and no new use has yet been found (Turečková et al., 2021). These properties are functionally vacant, may be contaminated, structurally dilapidated and falling apart. The properties are also often sites for the creation of black dumps or a concentration of sociopathological phenomena[9]. From this perspective, they can identify actual or potential

[9] It is a meeting place for homeless people, drug addicts, vandals, delinquents, alcoholics, etc., who are often surrounded by stray dogs and cats, which can lead to conflict between them and the urbexers.

threats and risks that can harm the health and life of not only the explorers themselves (Duda et al., 2024).

Brownfields are formed after civic amenities and as a remnant of industrial, agricultural, residential, military, administrative, mining, transportation or other activities (Turečková, 2022; Sucháček, 2019). Typical brownfields that are in the focus of attention of researchers are non-functioning hotels and hostels, shops and restaurants, agricultural cooperatives and estates, factories and warehouses, chateaux and mansions (more e.g. Turečková, 2023), monasteries, residential houses and villas or schools, cinemas, theatres, sanatoriums and health centres, bath houses and hospitals. Less common in the exploration of abandoned properties are vacant building sites, docks, tunnels, sewers and drains, water tanks or chimneys, waterworks, railways, mine buildings or mines, cellars, hangars, parsonages, crematoria, churches or cemeteries, amusement parks, playgrounds or swimming pools, bowling alleys, forgotten gardens and greenhouses, mills, bridge structures, bunkers, barracks10, shooting ranges etc. (also e.g. Ninjalicious, 2005). Urbex can also apply to objects that are not directly properties but are the result of human activity, such as the inspection of forgotten car wrecks, old disused trains, ships or planes etc.

As such, the exploration can be carried out randomly or purposively. It is not uncommon for a person to be drawn to an abandoned building and enter or peer inside out of curiosity. It is not a planned, ex-ante deliberate act. Until they had seen the building, they had no motive to inspect it. The opposite is true in the case of a purposeful, planned exploration, where you know about the building in advance and deliberately visit it for the purpose of viewing it. It is not uncommon for some urbex sites and their location to be shared only within a closed community, but they may be presented publicly, most often on social media or web portals, or offered for a fee11. Conversely, there is the possibility that information about the location of objects is not available, and it is up to the explorers to track down the site ex-ante and find the location themselves.

[10] In the context of the object of research, we can be even more specific and go further in the categorization of urbex: we can talk about army/military urbex concerning visits to objects related to the army, chateau urbex focuses on visits to abandoned chateaux and chateau grounds, the term industrial urbex is also used, etc.

[11] For example, a website https://www.urbexmapa.cz/ is available to offer clear maps of the best abandoned places in the Czech Republic and neighbouring countries for a fee.

Figure 1 Bowling alley at the abandoned hotel in Luhačovice, Czech Republic

Source: own (2022)

The exploration of buildings, areas, spaces, structures etc. can take the form of an external (outdoor) exploration, where you do not enter the urban enclosure (if it exists within the building) and only view the object from the outside (see Fig. 1). On the one hand, this type of urbex is safer than internal or complex urbex, but it is logically not as interesting for explorers. The internal urbex alone can be thought of as the exploration of objects with no possibility of viewing the external plan boundaries. Internal urbex refers to tunnels, sewers or shafts, for example. Comprehensive explorations can be considered the most common form of urbex, where the object is viewed from the outside as well as from the inside (see Fig. 2). The urbexer moves in the interior of the building, in corridors, rooms, halls, basements or, conversely, in the attic etc.

In many cases, urbex activities are on the edge of the law or consciously or unconsciously violate laws and legislative norms, especially in relation to the property rights to the real estate that is the object of urbex (for more see e.g. Duda et al., 2024; Gądzik, 2022). The most common are unauthorized trespassing of someone else's property and search of someone else's premises.

In this case, the urbex can be described as unauthorized according to the legitimacy of the exploration carried out. Conversely, an urbex can be carried out with the consent of the owner, who gives the urbexer permission to inspect the abandoned building. A specific case is an urbex on an object where the owner is unknown or cannot be clearly identified at a given time. This urbex can be referred to as 'vacant'. The exploration of abandoned objects can be carried out by the urbexer alone, individually or as part of a larger group of people, i.e. collectively. An urbex enthusiast can engage in regular and relatively frequent or, on the contrary, exceptional (sporadic and haphazard).

Figure 2 Sanatorium Helios in Štrbské Pleso, Slovakia (exterior and interior view)

Source: own (2021)

The research can be personal – private, when the urbexer does not provide information about the visited object, he/she usually carries it out only for his/her own intimate pleasure and has no need (does not want) to openly identify with his/her experiences and the place of the urbex. The second option is shared urbex, where the wider public is informed about the activity in various forms. This division is indirectly related to the last category of urbex, which divides it according to the reasons for the research itself. A common one is altruistic urbex, the essence of which is to freely experience feelings of adventure and knowledge. The second type is commercial urbex, which has 'emerged' in recent years and is linked to the increasing popularity of this activity. These are activities related to urbex (searching and offering sites, organised tours etc.) which are purely commercial and they don’t make it anything but 'business'.

Apart from the above typology (Tab. 1), there is also a breakdown according to the motive for urbex, which can be curiosity, adventure, danger, the intention to experience non-conformity or to follow another person, fashion in the sense of current popularity (trend among people), etc. This classification is problematic from the point of view of the determination of motives, because repeated, recurrent urbex is the result of a combination of many of them. In the case of urbex, one could consider this categorization in the context of the question of what was the original, primary motive that led a person to undertake the first exploration. At the same time, we could argue about the classification of the urbex in terms of the location of the object that is the target of the exploration, namely whether it is located in the intravillan or extravillan, whether in a fully urbanized (populated) area or on its edge, or in rural areas (so-called rurex, rural exploration[12]). With regard to the concept of the urbex, there is so far a general consensus that the degree of development in the area is not relevant and that the urbex refers to objects located in the area as such.

Authentic urbex vs. pseudourbex

Pseudourbex is a new term coined to distinguish between the two main groups of explorers in the context of urbex activities. The word pseudourbex in the sense in which it is presented here has not yet been traced by my own search of sources elsewhere in the public domain (journals, books, popularization articles, web texts etc.). Pseudourbex is a exploration of urbex objects in a form that does not meet the conditions for authentic – genuine urbex, and which is "passed off" as such for various reasons and causes.

Urbex in the true sense of the word is based on complete and unconditional compliance with rules in various parallels of codes of ethics, but with the same factual content (see the previous chapter), supplemented by such manifestations, approaches and characteristics as the

[12] Author’s own term.

purposefulness of the research (non-randomness, systematicity) and disinterestedness. Urbex can be implemented in a group (rather small), but on the condition that it consists of equally motivated and behaving explorers - i.e. urbexers. Other forms of exploration and their types can be considered irrelevant to the fact whether or not it is authentic urbex. However, a complex/internal form of site exploration is more common than just an external exploration, the exploration is more likely to be unauthorised or free and relates to properties i.e. brownfield sites. The frequency of the exploration and the need to provide information about the property (within the confines of adherence to the ethical code) fully reflects the personality of the urbexer who refers to urbex in their exploration activities and their passion for urbex exploration.

Anyone who does not conduct research within the boundaries outlined above, but refers to urbex (confronts their behaviour with urbex or refers to it) is considered a pseudo-urbex in our case. It does not always have to be a person who knowingly or unknowingly devalues a place. It may be subjects who accidentally discover an abandoned object and view it purely out of curiosity, without disturbing the original condition of the object or endangering the health or rights of themselves or others. In this case, even pseudourbex can be an appropriate and socially acceptable leisure activity. More often, however, it is the explorers who create entrances, damage the interior, behave in a deliberately irresponsible and inconsiderate manner towards others and the site itself, 'brag' about their exploration on social media, blogs, YouTube channels etc., where they share the location and/or benefit financially from this activity.

If we take into account all of the above, then we can synthesize the findings to create a more precise and comprehensive definition of urban exploration. In the true sense of the word, urban exploration is the purposeful and disinterested exploration of the material results of human activity that are found in the inhabited landscape, which is carried out solely for one's own pleasure and under the condition of unquestioning compliance with the rules set out in the so-called code of ethics of urban exploration. Unlike the pseudo-urbexer, the urbexer does not normally publish the locations of objects and does not "brag" to a wider audience about his or her urbex activities, behaves responsibly and prudently, does not take unnecessary risks and does not damage the object he or she visits. Pseudourbex represents (according to the author) a deliberate and more detailed exploration of no longer used objects created by human effort, which is, however, conducted recklessly, in contradiction to the ethical code of urbex, an exploration that devalues the object being explored and contributes to a deeper devaluation of its value; it is also an exploration that is excessively publicized, may have a commercial character, or the explorer's main motivation is not to experience the inner experience of the exploration itself "with his own eyes".

CONCLUSION

Urban exploration is an emerging leisure phenomenon and an alternative form of unconventional tourism. Given the trends in society, it is to be expected that the popularity of urbex will increase, not only in the form of the original – authentic urbex, but also the inauthentic, pseudo-urbex. It is the attempt to distinguish and appropriately name the two forms of research related to urbex activities that was the aim of this paper. Three groups of subjects are now named in the context of urbex activities, i.e., those who do not do urbex at all; those who conduct it in the form in which urbex is supposed to be conducted; and those who adapt the research to their (often unethical) needs and behave irresponsibly. The author's attempt at a neologism and the introduction of a new term is not definitive, as already mentioned above, but it is now up to the scientific community to decide how to work with it further. In order to fulfil the stated purpose in the relations of a scientific text, a synthesis of knowledge based on the general definition of urbex, concretized in the framework of the typology of exploration and the rules of conduct presented in the so-called code of ethics of urbex, was used. The elaborated typology of research is the author's own invention; the rules are the result of the content and substantive unification of several forms of ethical codes and the stated rules. The modified – more specified definition of urbex and its confrontation with pseudo-urbex is the result of an inductive combination of these three approaches. The introduction of the term pseudourbex and the definition of its content, or rather the outlining of its manifestation, may in the future refine the studies and research carried out regarding urban exploration.

As already mentioned, the author has not yet found an expert text that would try to distinguish between urban exploration (the "true" activity that urban exploration is supposed to be) and alternative forms of exploration of abandoned and unused results of human activity. It is therefore also a scientific and methodological problem, which is solved by the introduction of the term pseudourbex, while its use can also be on a general and popularizing level. The scientific and methodological contribution of the article to the urbex problem can also be perceived within the framework of the presented typology of research. The author believes that due to the growing popularity of urbex activities in society and their promotion in the form of a variety of media, there is a significant space for addressing this issue also from the scientific, academic and professional perspective.

Another potential direction of research may be aimed at refining or supplementing the typology of urbex activities. The author himself is currently conducting the aforementioned research (now intended for urbexers from the Czech Republic), where respondents sign up for various types of surveys listed in the typology. Primary research in this area is quite difficult to implement (specific group of respondents and their approach to participating in research of this type), therefore it will be very interesting to find out the specific structure and form of practiced urbex and the attitudes of the urbexers themselves.

With regard to a possible discussion on the presented content of the submitted article, it should be stated that such is not possible.

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