

# TOURIST

## Guidelines for the Implementation of the Focus Group Interviews

Project Acronym:	TOURIST
Full Project Title	Competence centres for the development of sustainable tourism and innovative financial management strategies to increase the positive impact of local tourism in Thailand and Vietnam
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## 1. Introduction

**Sustainability** has become an important topic and concept in relation to tourism planning and development. First of all, the concept of sustainable tourism must be understood in the same way. The concept was consolidated since its first formal definition, in the Brundtland Report (World Commission on Environment and Development, 1987). Sustainability has been a constant feature of tourism policy at all territorial levels. Institutional policies and initiatives have advanced gradually from an initial acceptance of sustainability in tourism associated almost exclusively with the **conservation of the environment**, to a more global concept, which takes the balance between **society, the environment and economy** into account.

In order to detect the main aspects related to sustainable tourism and the specific needs of Thailand, Vietnam, Austria, Finland and Spain, Work Package 1 is starting with a status-quo analysis of sustainable tourism efforts.

In order to do so, it is crucial the **analysis and evaluation of impacts** based on a clear methodology that will allow designing and implemented adequate framework that will facilitate sustainability. Considering trends and comparing current data are necessary for this task.

It must be underlined that the application of sustainability still depends on the attitude adopted and the relevant territorial and social context. Thus, **stakeholders' implication** in the analysis and designing process is vital for sustainable tourism development to be successful.

## 2. METHODOLOGY AND GUIDELINES

Given the variety of the tourism contexts in the partner countries, a more qualitative research is needed. Thus, a focus group technic will be used.

### 2.1. FOCUS GROUPS

A focus group is a group discussion on a particular topic organised for research purposes. This discussion is guided, monitored and recorded by a researcher (moderator or facilitator). Focus groups seem to allow finding ideas and solutions aimed at facing specific problems.

In the following paragraphs we underline the main aspects to be taken into consideration:

#### 2.1.1. Purpose of focus groups

Focus groups are used for obtaining information and opinions from different individuals (independent or experts in the field of tourism and its sustainability). This technic enables the generation of ideas with open answers, well-structured and with an additional qualitative component. It is based on collective views and it can capture the complexity of a given context and analyse the way in which participants in the group value and define key concepts in their own words.

### *What's the criteria for using focus groups?*

- For research relating to group norms, meanings and processes;
- Aiming at:
  - Exploring tourism sustainability in the partner countries and collect group language or narratives to be used in later stages of the project;
  - Clarifying, extending, qualifying or challenging data collected through other sources;
  - Giving feedback results to research participants.

#### 2.1.2. Conducting focus groups: group composition and size

The composition of a focus group needs great care to get the best quality of discussion. There is no 'best' solution to group composition, and group mix will always impact on the data, according to things such as the mix of ages, gender and social professional statuses of the participants.

What is important is that they may interact with each other before the focus group proceeds. Interaction is key to a successful focus group.

The optimum size for a focus group is six to eight participants (excluding researchers), but focus groups can work successfully with as few as three and as many as 14 participants.

In order to ensure a genuine process of discussion, and following the TOURIST project proposal, we recommend having **a group of 5 to 8 participants** in the focus group. It should be a diverse group with participants with **different backgrounds**. All participants should have some **experience with the topic** to be able to participate in the discussion. It is recommended to include **stakeholders** from the following areas:

- ✓ **Tourism companies** such as hotels, tourism operators or other tourism service providers;
- ✓ **Tourism association** representatives;
- ✓ Representatives of **other connected sectors** which might influence and/or depend on tourism sector;
- ✓ Representatives from **governmental organisations** dealing with tourism management.

The Interview Guide is constructed in a way that you can invite different stakeholders for the same round table discussion. You may also decide to have two separated groups (e.g. a separate focus group interview with practitioners, manager and/or government representatives/policy makers), if this works better in your context.

Partners are requested to check and confirm that the specialization assigned in the project's proposal is suitable to their region and institution:

- ✓ HU – Cultural and beach/leisure tourism;
- ✓ USSH Hanoi - City and eco-tourism;

- ✓ USSH HCMC – City tourism;
- ✓ KU – City tourism and regional development through tourism;
- ✓ BU – Beach/leisure tourism;
- ✓ PU – Eco-tourism;
- ✓ PSU – Beach and leisure tourism.

### 2.1.3. The interview

A focus group interview generally starts with more **general to more specific questions**. Question **order** should be **relative to importance of issues** in the research agenda.

Usually, **less than a dozen predetermined questions** are needed and, as with research interviews, the moderator will also explore and enlarge on issues according to the evolution of the discussion.

After presenting the moderator, the participants, the projects and the aim of the focus group, an introduction to the main concepts will be carried out.

## SECTION 0 - INTRODUCTION TO THE CONCEPTS OF SUSTAINABLE TOURISM AND INNOVATIVE FINANCIAL MANAGEMENT STRATEGIES

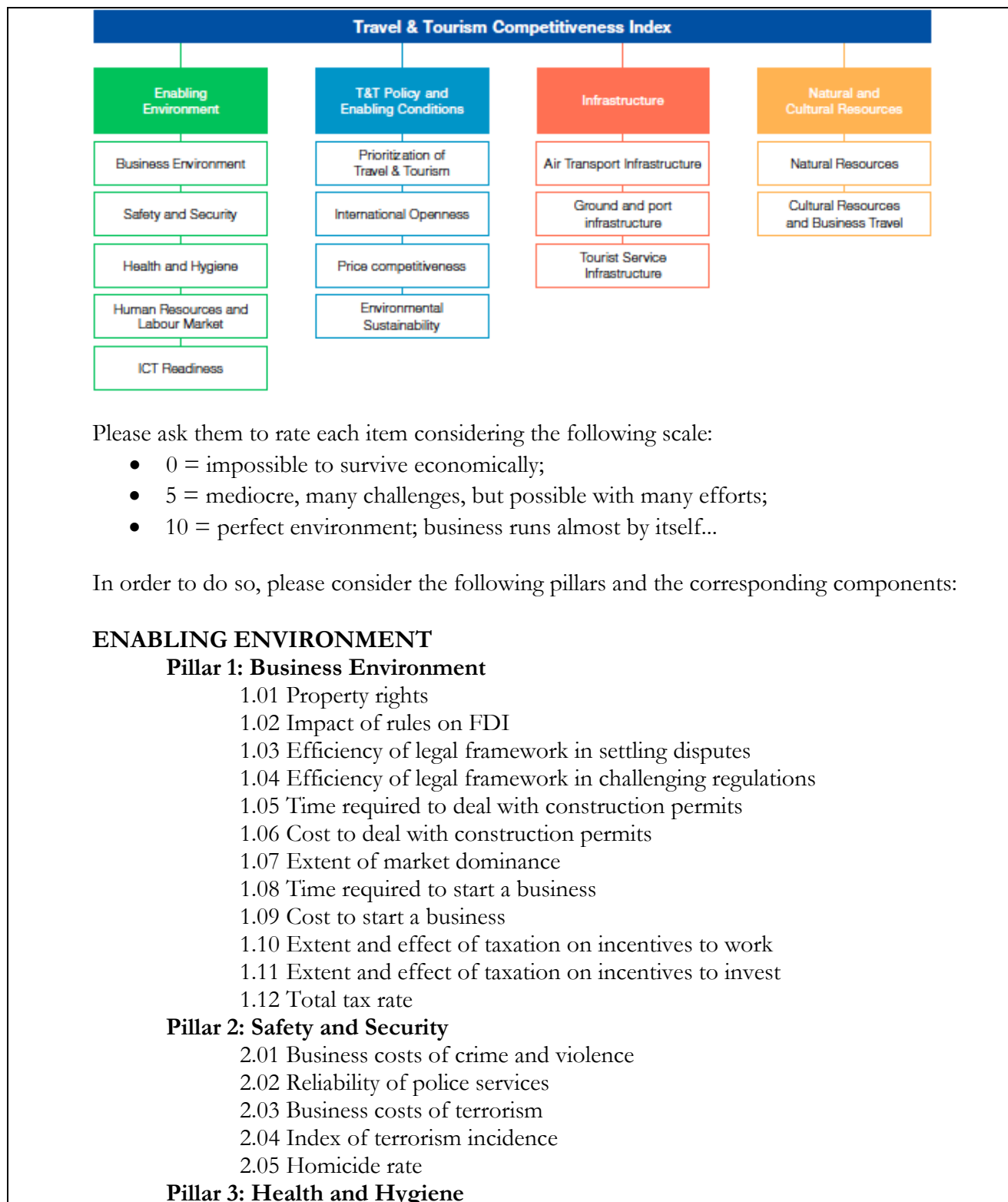
A common presentation will be developed in order to ensure consistency. The presentation will be based on the information facilitated during the kick-off meeting and feedback from the partners will be required. Please let the WP leader (UA) and the project coordinator (FHJ) know the focus groups schedule planned by your institution.

Furthermore, participants will be asked to discuss about different aspects organized in three different sections as follows:

## SECTION I – SWOT analysis of sustainable tourism and innovative financial management strategies

**Please ask the participants to develop a SWOT analysis** of your region/country in terms of sustainable tourism and innovative financial management strategies

- You could allocate about 45' for this section (flexibility according to the needs).
- Please make sure to have the results as detailed as possible (use flipcharts or other resources in order to have a clear and visible/graphic image of the main aspects depicted by the participants)
- It would be very much appreciated if you could ask participants to consider also the aspects that appear in the travel and tourism competitive index (developed by the World Economic Forum) when developing the SWOT analysis without forgetting that sustainable does not includes only economic aspects, but also environmental and social ones:



- 3.01 Physician density
- 3.02 Access to improved sanitation
- 3.03 Access to improved drinking water
- 3.04 Hospital beds
- 3.05 HIV prevalence
- 3.06 Malaria incidence

**Pillar 4: Human Resources and Labour Market Qualification of the labour force**

- 4.01 Primary education enrolment rate
- 4.02 Secondary education enrolment rate
- 4.03 Extent of staff training
- 4.04 Treatment of customers
- Labour market
- 4.05 Hiring and firing practices
- 4.06 Ease of finding skilled employees
- 4.07 Ease of hiring foreign labour
- 4.08 Pay and productivity
- 4.09 Female labour force participation

**Pillar 5: ICT Readiness**

- 5.01 ICT use for business-to-business transactions
- 5.02 Internet use for business-to-consumer transactions
- 5.03 Individuals using the internet
- 5.04 Broadband internet subscribers
- 5.05 Mobile telephone subscriptions
- 5.06 Mobile broadband subscriptions
- 5.07 Mobile network coverage
- 5.08 Quality of electricity supply

**T&T POLICY AND ENABLING CONDITIONS**

**Pillar 6: Prioritization of Travel & Tourism**

- 6.01 Government prioritization of the T&T industry
- 6.02 T&T government expenditure
- 6.03 Effectiveness of marketing to attract tourists
- 6.04 Comprehensiveness of annual T&T data
- 6.05 Timeliness of providing monthly/quarterly T&T data
- 6.06 Country Brand Strategy rating

**Pillar 7: International Openness**

- 7.01 Visa requirements
- 7.02 Openness of bilateral Air Service Agreements
- 7.03 Number of regional trade agreements in force

**Pillar 8: Price Competitiveness**

- 8.01 Ticket taxes and airport charges
- 8.02 Hotel price index
- 8.03 Purchasing power parity
- 8.04 Fuel price levels

**Pillar 9: Environmental Sustainability**

- 9.01 Stringency of environmental regulations

- 9.02 Enforcement of environmental regulations
- 9.03 Sustainability of travel and tourism industry development
- 9.04 Particulate matter (2.5) concentration
- 9.05 Number of environmental treaty ratifications
- 9.06 Baseline water stress
- 9.07 Threatened species
- 9.08 Forest cover change
- 9.09 Wastewater treatment
- 9.10 Coastal shelf fishing pressure

## **INFRASTRUCTURE**

### **Pillar 10: Air Transport Infrastructure**

- 10.01 Quality of air transport infrastructure
- 10.02 Available seat kilometres, domestic
- 10.03 Available seat kilometres, international
- 10.04 Aircraft departures
- 10.05 Airport density
- 10.06 Number of operating airlines

### **Pillar 11: Ground and Port Infrastructure**

- 11.01 Quality of roads
- 11.02 Quality of railroad infrastructure
- 11.03 Quality of port infrastructure
- 11.04 Quality of ground transport network
- 11.05 Railroad density
- 11.06 Road density
- 11.07 Paved road density

### **Pillar 12: Tourist Service Infrastructure**

- 12.01 Hotel rooms
- 12.02 Extension of business trips recommended
- 12.03 Presence of major car rental companies
- 12.04 ATMs accepting Visa cards

## **NATURAL AND CULTURAL RESOURCES**

### **Pillar 13: Natural Resources**

- 13.01 Number of World Heritage natural sites
- 13.02 Total known species
- 13.03 Total protected areas
- 13.04 Natural tourism digital demand
- 13.05 Quality of the natural environment

### **Pillar 14: Cultural Resources and Business Travel**

- 14.01 Number of World Heritage cultural sites
- 14.02 Number of oral and intangible cultural heritage expressions
- 14.03 Number of sports stadiums
- 14.04 Number of international association meetings
- 14.05 Cultural and entertainment tourism digital demand

For further details, please see the annex. Part of the information requested for the TTCI is based on statistical data. The objective is to have them rated by the experts participating in the focus group.

## SECTION II – Sustainable Tourism and Innovative financial management strategies

Based on the results of the SWOT analysis, please ask the participants to discuss and answer the following questions:

1. **What types of touristic products/services are offered in your region/country?**
  - Is there any clear **differentiation** between the types of tourism? Are they **complementary or independent**?
2. Does the **touristic product** (of your region/country) have a corporate/regional/national **image**?
  - Are there clear multichannel **distribution and commercialisation** strategies of your touristic product?
  - Who's in charge of the distribution and commercialization of your touristic offer?
3. Who is **directly** involved in the **production process of these tourism products/services**?
  - What kind of **firms** (local travel agencies, local hotels or similar, national/international tour operators, international hotel chains, etc.)?
  - What kind of **employees**? What are their **education level** and their **experience in the tourism industry**? How would you classify their **communication skills**? By this we refer to: (a) In what **language** do they communicate with foreign tourists? (b) Do you think that their **foreign language level** is adequate for a fluent communication with foreign tourists?;
  - What is their **ICT readiness** level? Do they use information and technology communication tools at a daily basis for doing their jobs?
4. What **other actors** (firms, administrations, etc.) are **indirectly involved** in the production process? *(Please keep in mind the value chain of tourism and use examples of connected agents: for a tourist coming to an all-inclusive establishment, food and beverage providers are, without a doubt, contributing indirectly in the production process of the touristic product/service, which in this case would be all-inclusive package)*
5. What kind of **infrastructures** is used? What type of infrastructure is needed for developing touristic activities without facing any issue in satisfying tourists' expectations?
6. Could you please specify: (a) The **type of tourist/consumer** – approximately how many are national and how many are international tourists? (c) What are the most relevant **requests/expectations** of tourists? (d) Up to what level do you think tourists' expectations were/are fulfilled? (e) Do you measure in any way the **satisfaction level** of tourists?
7. What **impact** do you think tourism is having in your region/country?
  - **Economic** (e.g., economic growth, improvement of employment rate and reduction of unemployment, quality of jobs created through tourism, increase in the life standards and human development, increase the attractiveness of the destination for foreign investors causing a multiplier effect in other connected sectors, etc.);
  - **Social** (in terms of integration, access to education, health services, safety, criminality level, conservation/damages of cultural heritage, effects on national population structure – aging population, for example, etc.). Are the **residents** opposing any type of resistance to any specific type of tourism/tourists or in general?

- **Environmental** (level of pollution via waste, fossil fuel consumption, water consumption, natural resources damages, etc.).
- 8. What **financial sources** are used in order to develop the tourism activities in your region/country? Is access to financing this kind of activities an easy task? What are the main conditions to obtain financial support in this area?
- 9. Are there any **particular aspects in your region/country** to which more attention should be paid in order to make tourism more successful and sustainable?

### SECTION III – Current and past efforts in Sustainable Tourism and Innovative financial management strategies

Based on **the results of the SWOT analysis** and the aspects discussed in **the previous section**, please ask the participants to discuss and answer the following questions:

1. **What is IMPORTANT** to be developed in your region/country in order to promote a more Sustainable Tourism?
2. **What is URGENT** to be developed in your region/country to increase the sustainability of tourism industry?
  - What possible **paths** you think could be used for tackling them?
3. **Which are the most important TARGET GROUPS** that can influence the internal and external stakeholders in developing Sustainable Tourism?
  - What **actors** should be involved in the development of a sustainable tourism context?
4. **Are there any standards** in Sustainable Tourism and Innovative financial management strategies in the region/country?
5. **Could you please mention any past efforts** in Sustainable Tourism and Innovative financial management strategies in the region/country?
  - Did these efforts had any economic, social and/or environmental **POSITIVE** impacts in your region/country?
6. **What are the current efforts** in Sustainable Tourism and Innovative financial management strategies in the region/country?
  - What economic efforts are made?
    - Do you invest in the area where your business operates? E.g. does any profit go back to the local community where you operate to help preserve and protect the area where your customers visit?
    - Do you contribute to the preservation of resources which your company uses?
    - Do you hire local staff? What sort of training do you have for your staff?
    - Do you source your supplies locally to support your local community?
    - Do you have a supply-chain policy for fair trade and equity?
  - What environmental efforts are currently made?

- Do you take responsibility for damage to the environment by your potential use (e.g. use of water in a dry area, use of energy efficient measures, etc.).
- What conservation/reduction measures are you undertaking for water, waste and energy?
- Do you benchmark yourself against other companies in terms of environmental performance?
- Do you offer incentives for your staff to carpool or use public transport?
- Do you offer such alternatives to your guests?
- Do you provide your staff with information, tips and training on how to be more environmentally responsible (which will save the company money at the same time)?
- Reduce, reuse, and recycle? How do you reduce waste, water and energy? Do you print on recycled paper, use biodegradable ink? Do you recycle in your office?
- Do you plant indigenous species of trees or shrubs in your areas? Do you try to conserve water by having dual flush toilets and other measures?
- Do you have an environmental policy which you adhere to?
- If you offer tours – what size are your tour groups? Travelling in groups of small numbers has less impact on the flora and fauna in an area than having hundreds of people visiting a destination at once.
- What social efforts are taken?
  - Do you make suggestions to your clients to purchase local products to support the local community?
  - Do you make sure you do not purchase products made from endangered species? Do you act responsibly and provide such guidance to your clients/guests e.g. pre/post departure information?
  - Do you support any local projects e.g. donating a percentage of your profits to wildlife protection or social causes?
  - Do you inform your clients of cultural or religious issues where they should be considerate of their hosts?
  - Do you make sure than none of your suppliers exploit children or have break human rights conduct?

7. **Are there any ongoing (public/private) initiatives that you're aware of?** We refer to initiatives that are not implemented yet, but are planned to be designed/developed.

Each Focus Group will have to create a Focus Group report using the **note taking form** (see section 5 for further details).

#### 2.1.4. Moderating

Moderating a focus group is not an easy task; it is rather complex and it requires a set of skills, which are related to the following principles:

- Participants have valuable views and the ability to respond actively, positively and respectfully. This approach will encourage fruitful discussions.
- The moderator must guide a discussion rather than join in with it.
- The role of the moderator is to facilitate group discussion, keeping it focussed, but without leading it. Additionally, it should be avoided a discussion dominated by one member. How? By emphasising at the outset the importance of hearing a range of opinions, ensure that all participants have ample opportunity to contribute, allow cent participants, for example.
- Have the capacity of handling unpalatably critical views on a topic that may be important to you.
- It is important to be yourself as if the moderator is comfortable, participants normally feel more relaxed.

It is recommended to have one moderator leading the group discussion by initiating the discussion, by asking specific additional questions, by handing over to the next participant and by taking care of the time management. A second moderator/researcher is requested for taking notes, supporting the first moderator e.g. with additional questions or summing up if needed and provides support.

The **interview guide** must be used to ensure comparability of the results in the different regions and countries. The moderator is in charge of allowing space for interaction, but the interview needs to be in line with the guideline and the questions.

The focus group can be held in **English** or in the **national languages**. If you opt for national languages, the interview guide will be translated beforehand. The notes taken during the sessions will serve for the main results of the interview, the latest must be however complicated in English.

#### 2.1.5. Other relevant factors

Given the relevance of the information to be obtained from a focus group, the venue is important and should be accessible, comfortable, private, quiet and free from distractions.

Focus groups are usually recorded, often observed (by a researcher other than the moderator, whose role is to observe the interaction of the group to enhance analysis) and sometimes videotaped. It is **strongly recommended**, if possible and on agreement of the participants, to **record the focus group interview** with a voice recorder or a similar tool. At the start of a focus group, a moderator should acknowledge the presence of the audio recording equipment, assure participants of confidentiality and ask them to sign the consent form in this sense.

The systematic analysis of focus group transcripts is crucial. It is essential to take notes during the

focus group interview as the analysis of focus group data must take account of the group dynamics that have generated remarks. You can afterwards transcribe the interview or use the recording to complement the notes you were taking during the interview, to check, if you missed some important details during the interview. For the note taking we recommend to use the **note-taking form**.

**Duration: no more than 2- 3 hours.**

### 3. EQUIPMENT NEEDED

- Table and enough chairs for all participants and moderators
- Flip chart, paper, markers, tape
- PC and projector (e.g. for a presentation of the project, common understanding of sustainable tourism, desk research results, or for taking notes, etc.)
- Voice recorder, battery
- Clock for time keeping
- Name tags for the participants
- Paper, Post-its, pens for the participants (to take notes if they want)
- Consent forms, attendance list, interview guide, note taking form
- Small refreshments

### 4. FOCUS GROUP PROCESS

- Please make sure that you have prepared all documents you need during the focus group:
  - The focus group guide available at:  
[https://www.dropbox.com/s/ml8x94y1lw68do/1-TOURIST\\_FOCUS%20GROUP%20guidelines\\_LIGHT%20version.docx?dl=0](https://www.dropbox.com/s/ml8x94y1lw68do/1-TOURIST_FOCUS%20GROUP%20guidelines_LIGHT%20version.docx?dl=0)
  - The note taking form available at:  
[https://www.dropbox.com/s/6pqsjcldbva9x14v/2-TOURIST\\_Focus%20Group%20Note%20Taking%20Form.docx?dl=0](https://www.dropbox.com/s/6pqsjcldbva9x14v/2-TOURIST_Focus%20Group%20Note%20Taking%20Form.docx?dl=0)
  - The attendance list available at: [https://www.dropbox.com/s/91atkiuf3tsqs58/4-TOURIST\\_%20Attendance%20list\\_Focus%20Group.xlsx?dl=0](https://www.dropbox.com/s/91atkiuf3tsqs58/4-TOURIST_%20Attendance%20list_Focus%20Group.xlsx?dl=0)
  - And enough copies of the consent form for all participants available at:  
[https://www.dropbox.com/s/1hum3fg7ag8ofqf/3-TOURIST\\_Focus%20Group%20Consent%20Form.docx?dl=0](https://www.dropbox.com/s/1hum3fg7ag8ofqf/3-TOURIST_Focus%20Group%20Consent%20Form.docx?dl=0)
- Please ask all participants to fill in and sign:
  - The attendance list
  - And the consent form for participation and recording of the interview.

- Welcome, presentation of the moderators, presentation of the participants (Name, Organization, Function/Position, Experience in the topic)
- Short presentation on the TOURIST project, partnership, aims and target groups; the output and the specific aims of the focus group interview.
- **SECTION 0** – Introduction to the concepts of **sustainable tourism and innovative financial management strategies**
- **SECTION I Questions** – **SWOT analysis of sustainable tourism and innovative financial management strategies**
- **SECTION II Questions** – **Sustainable Tourism and Innovative financial management strategies**
- **SECTION III Questions** – **Current and past efforts in Sustainable Tourism and Innovative financial management strategies**
- Before closing the interview, please make sure to give them the chance of expressing if there is anything they would like to add giving them the opportunity to deal with issues that they have thought about, or think are important but have not been dealt with during the interviewer.
- Information on the project's dissemination activities (newsletter, Facebook, etc.). You can offer participants to subscribe to the dissemination database to receive further information.

## Annex

The details regarding the pillars of Travel and Tourism (T&T) Competitiveness Index are depicted below (extracted from the Travel and Tourism Competitiveness Report).

### **Pillar 1: Business Environment (12 indicators)**

This pillar captures the extent to which a country has in place a conducive policy environment for companies to do business. Research has found significant links between economic growth and aspects such as how well property rights are protected and the efficiency of the legal framework. Similarly, distortions in taxation and competition policy - including both domestic and international competition, measured in terms of foreign direct investment (FDI) facilitation - impact the efficiency and productivity of a country. These factors are important for all sectors, including T&T. In addition, we consider the cost and time necessary to deal with construction permits, which is a particularly relevant issue for T&T development.

### **Pillar 2: Safety and Security (5 indicators)**

Safety and security is a critical factor determining the competitiveness of a country's T&T industry. Tourists are likely to be deterred from traveling to dangerous countries or regions, making it less attractive to develop the T&T sector in those places. Here we take into account the costliness of common crime and violence as well as terrorism, and the extent to which police services can be relied upon to provide protection from crime.

### **Pillar 3: Health and Hygiene (6 indicators)**

Health and hygiene is also essential for T&T competitiveness. Access to improved drinking water and sanitation is important for the comfort and health of travellers. In the event that tourists do become ill, the country's health sector must be able to ensure they are properly cared for, as measured by the availability of physicians and hospital beds. In addition, high prevalence of HIV and malaria can have an impact on the productivity of the T&T labour force and play a role in discouraging tourists from visiting a country.

### **Pillar 4: Human Resources and Labour market (9 indicators)**

Quality human resources in an economy ensure that the industry has access to the collaborators it needs. The sub-components of this pillar measure how well countries develop skills through education and training, and enhance the best allocation of those skills through an efficient labour market. The former includes formal educational attainment rates and private sector involvement in upgrading human resources, such as business investment in training services and customer care. The latter includes measures of the flexibility, efficiency and openness of the labour market and the participation of women, to assess the depth of the country's talent pool and its ability to allocate human resources to their best use.

### **Pillar 5: ICT Readiness (8 indicators)**

Online services and business operations have increasing importance in T&T, with internet being used for planning itineraries and booking travel and accommodation - but ICT is now so pervasive and important for all sectors, it is considered part of the general enabling environment. The sub-components of the pillar measure

not only the existence of modern hard infrastructure (mobile network coverage and quality of electricity supply), but also the capacity of businesses and individuals to use and provide online services.

#### **Pillar 6: Prioritization of Travel & Tourism (6 indicators)**

The extent to which the government prioritizes the T&T sector has an important impact on T&T competitiveness. By making clear that the sector is of primary concern, the government can channel funds to essential development projects and coordinate the actors and resources necessary to develop the sector. Signalling the stability of government policy can affect the sector's ability to attract further private investment. The government can also play an important role in directly attracting tourists through national marketing campaigns. This pillar includes measures of government spending, effectiveness of marketing campaigns and country branding, and the completeness and timeliness of providing T&T data to international organizations, as this indicates the importance that a country assigns to its T&T sector.

#### **Pillar 7: International Openness (3 indicators)**

Developing a competitive T&T sector internationally requires a certain degree of openness and travel facilitation. Restrictive policies such as cumbersome visa requirements diminish tourists' willingness to visit a country, and indirectly reduce the availability of key services. Components measured in this pillar include the openness of the bilateral air service agreements which the government has entered, which impacts the availability of air connections to the country, and the number of regional trade agreements in force, which proxies the extent to which it is possible to provide world class tourism services.

#### **Pillar 8: Price Competitiveness in the T&T Industry (4 indicators)**

Lower costs related to travel in a country increase its attractiveness for many travellers as well as for investing in the T&T sector. Among the aspects of price competitiveness taken into account in this pillar are airfare ticket taxes and airport charges, which can make flight tickets much more expensive; the relative cost of hotel accommodation; the cost of living, proxied by purchasing power parity; and fuel price costs, which directly influence the cost of travel.

#### **Pillar 9: Environmental Sustainability (10 indicators)**

The importance of the natural environment for providing an attractive location for tourism cannot be overstated, so policies and factors enhancing environmental sustainability are an important competitive advantage in ensuring a country's future attractiveness as a destination. This pillar consists of policy indicators such as the stringency and enforcement of the government's environmental regulations and variables assessing the status of water, forest resources and seabeds, proxied by coastal shelf fishing pressure. Given the environmental impacts of tourism itself, we also take into account the extent to which governments prioritize the sustainable development of the T&T industry in their respective economies.

#### **Pillar 10: Air Transport Infrastructure (6 indicators)**

Air connectivity is essential for travellers' ease of access to and from countries, as well as movement within many countries. In this pillar we measure the quantity of air transport, using indicators such as available seat

kilometres, the number of departures, airport density, and the number of operating airlines, as well as the quality of air transport infrastructure for domestic and international flights.

#### **Pillar 11: Ground and Port Infrastructure (7 indicators)**

The availability of efficient and accessible transportation to key business centres and tourist attractions is vital for the T&T sector. This requires a sufficiently extensive road and railroad network, proxied by road and railroad densities, as well as roads, railroads, and ports infrastructure that meet international standards of comfort, security and modal efficiency. The pillar also accounts for unpaved roads which enable local connections, and to some extent, can proxy the existence of picturesque roads which can, in very specific contexts, attract tourists.

#### **Pillar 12: Tourist Service Infrastructure (4 indicators)**

The availability of sufficient quality accommodation, resorts and entertainment facilities can represent a significant competitive advantage for a country. We measure the level of tourism service infrastructure through the number of “upper- level” hotel rooms complemented by the extent of access to services such as car rentals and ATMs.

#### **Pillar 13: Natural Resources (5 indicators)**

Countries with natural assets clearly have a competitive advantage in attracting tourists. In this pillar we include a number of attractiveness measures, including the number of UNESCO natural World Heritage sites, a measure of the quality of the natural environment which proxies the beauty of its landscape, the richness of the fauna in the country as measured by the total known species of animals, and the percentage of nationally protected areas, which proxies the extent of national parks and nature reserves.

#### **Pillar 14: Cultural Resources and Business Travel (5 indicators)**

A country’s cultural resources are another critical driver of T&T competitiveness. In this pillar we include the number of UNESCO cultural World Heritage sites, the number of large stadiums that can host significant sport or entertainment events, and a new measure of digital demand for cultural and entertainment—the number of online searches related to a country’s cultural resources can allow the level of interest to be inferred. The number of international association meetings taking place in a country is included to capture, at least partially, business travel.