



A Preliminary Property Checklist for Evaluating the Tourist Experience

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Abstract. The tourist experience (TX) has become a crucial aspect in tourism destination management. Tourists increasingly rely on digital environments to explore destinations, compare prices, read reviews from other users, and make reservations in a secure and efficient manner. This trend has led to a significant increase in competition, where every detail of the user experience (UX) can directly influence customer satisfaction and loyalty. We consider customer experience (CX) as an extension of UX, and TX as a particular case of CX. In this context, there is a growing need to develop tools that enable the objective and systematic evaluation of TX. To address this need, a preliminary checklist is proposed. It considers various criteria that may impact tourist satisfaction, and their perception of the services provided. The proposed checklist adopts a comprehensive approach, offering a general overview of how customers interact with tourism-related products, systems and services, and identifying elements that may facilitate or hinder their experience. The main objective of the proposed checklist is to provide a practical guide for tourism destination managers, enabling them to identify the strengths and areas for improvement. The tool facilitates the evaluation of each critical factor, helping stakeholders gain a clearer understanding of the areas that require optimization to enhance TX. Furthermore, this tool aims to serve as a starting point for tourism organizations to better understand tourists' needs. This is especially relevant in an increasingly globalized and competitive environment where tourists have higher expectations.

Keywords: Tourist Experience · Customer Experience · Property Checklist · Tourist Experience Evaluation

1 Introduction

In a globalized and competitive world, the Tourist eXperience (TX) has emerged as a key factor in destination management and customer satisfaction. In this context, TX is understood as a specific particularization of Customer eXperience (CX), highlighting

the need for tools that enable an objective and systematic evaluation of this phenomenon. However, there is a notable scarcity of specialized tools designed to analyze the TX across its various stages: before, during, and after interaction with any destination, product, system, or service.

Our study addresses this need by developing a preliminary checklist aimed at comprehensively evaluating the TX. The checklist is based on a thorough review of the existing literature on key factors significantly influencing TX, including cultural considerations, and an analysis of various checklist methodologies. This approach not only identifies strengths and areas for improvement but also provides a practical and adaptable tool for strategic decision-making in the tourism sector.

The objective of this research is to provide a valuable resource for destination managers, service operators, and other key stakeholders in the industry. By facilitating a structured and adaptable analysis of tourist interactions, this checklist seeks to optimize service quality, enhance customer satisfaction, and promote sustainable practices that ensure positive and memorable experiences for tourists. Section 2 analyzes the main concepts that fundaments our study. Section 3 indicates the methodology that we used. Section 4 describes the process of checklist's development. Finally, Sect. 5 highlights conclusions and proposes future work.

2 Background

The tourism sector holds significant relevance in international economies, as evidenced in 2023 when the direct GDP contribution of tourism reached USD 3.3 trillion, equivalent to 3% of the global GDP [1]. However, during the pandemic, this sector experienced a challenging period due to health restrictions, which caused a decline in global tourism activity, particularly in air passenger traffic and hotel operations [2]. By 2024, the tourism sector had recovered to 98% of pre-pandemic levels, yet it faced a series of unresolved challenges, including inflation in costs, specifically in transportation and accommodation prices, volatility in oil prices, geopolitical conflicts, meteorological phenomena, and labor shortages [3].

The checklist is an organizational tool for the evaluator, which can be represented as a printed copy or a digital form. It contains a list of elements, questions, or criteria, which may follow a chronological order, regarding items that should, must, or could be carried out [4]. Checklists can be relevant for process control within an organization, as they provide a structured method to verify compliance with specific elements, aiding in the identification of errors, best practices, and the implementation of improvements [5]. Additionally, checklists are versatile tools, as they can be used in a wide variety of contexts, ranging from highly technical knowledge areas to more everyday aspects of people's lives. Some examples are outlined below.

In education, checklists have been developed, including an informal environmental learning verification checklist intended for use by environmental interpreters and educators [6]. In the healthcare sector, various checklists have also been developed, such as the one introduced by the WHO (World Health Organization), aimed at ensuring minimum safety standards. Based on this, a study was conducted on the challenges of introducing the checklist into workplace contexts, revealing that teams became more efficient after

internalizing it into their processes [7]. Another study on checklists in the healthcare field focused on a checklist designed to improve quality in the ICU (Intensive Care Unit), which complemented quality rounds and aimed to anticipate potential problems [8]. Comparisons have also been made between inspection methods to assess literacy and User eXperience (UX) in eHealth. These comparisons revealed that no existing method is optimal for evaluating the literacy demands and UX of consumer health information systems. As a result, a checklist was proposed as it is easier to use for individuals who are not experts in the field [9]. A checklist was developed that combines education and healthcare, intended for use by teachers and preceptors to enhance the clinical experiences of nursing students. It was noted that checklists can be beneficial for addressing issues related to clinical experiences and improving relationships among those involved [10]. A medical tourism checklist was created, aiming to ensure safety in planning for medical discharge. It was designed to be easily modified and applicable to various fields within medical tourism. Its purpose was to assist patients in providing a summary to their primary care physician in their home country [11]. A checklist was developed to evaluate the UX of mobile applications. It was emphasized that this checklist was not intended to replace informed expert evaluations or user studies but was applicable in contexts where numerous applications lacked sufficient expert resources. The goal was to make it widely accessible to researchers or experts who might not specialize in UX or computer science [12].

In the tourism sector it was proposed that hotels should employ checklists to assess the quality of their services and, based on this evaluation, improve customer satisfaction. This would ensure that all hotel areas meet established standards. The application of this tool could make the difference between an average and an excellent experience, one that tourists would recommend or repeat. Checklists can collect information to identify service shortcomings, enabling corrective actions and fostering continuous improvement [13].

A checklist to evaluate the functionality of geoportals for sustainable tourism planning was proposed. The authors highlighted the utility of this tool for both supply and demand, as geoportals play a crucial role in tourism management and travel planning. This checklist included the following categories and domains: (1) Spatial data presentation, with a domain aimed at evaluating tourism, transportation, and information and education; (2) Transactions and networks, with a domain assessing transactions, social networks, and networking; and (3) Development techniques, which evaluated versatility and data exchange [4].

A checklist to evaluate CX in the hotel industry was also proposed. This tool aims to improve the quality and sustainability of hotel services by analyzing the entire guest journey, encompassing pre-stay, during-stay, and post-stay processes. The checklist evaluates the following dimensions: (1) Information search, (2) Room reservation, (3) Check-in, (4) Room stays, (5) Ordering and receiving food, (6) Check-out, and (7) Reporting the experience. Additionally, the study highlights the lack of checklists specifically designed to evaluate CX in the hotel industry [14].

A checklist is defined as a tool that lists a series of elements, tasks, or steps to be completed, marked, or verified. Despite its utility, there is a notable scarcity of checklists specifically designed to analyze the holistic TX, across its various stages: before, during,

and after interaction with a destination. Consequently, the development of a preliminary checklist for the comprehensive evaluation of the TX, considering the previously mentioned elements, not only addresses a gap in the existing literature but also provides a valuable tool for strategic decision-making in a sector that is increasingly competitive and highly significant to the economy.

3 Methodology

Yelon outlined the conditions under which it is necessary to develop a checklist to teach a skill; however, these criteria can be expanded. The first condition states that a checklist is required when the performance being evaluated is a critical competency upon which other skills depend. The second applies when the skill is complex, and the instructor needs a checklist to ensure precision in verifying performance aspects. The third involves situations where shaping a skill through feedback is necessary. Finally, the fourth condition applies when the instructor requires students to work independently, monitor their own progress, and plan their study efficiently [15].

This general framework can be used when developing a TX checklist. TX is critical for customer satisfaction, relying on various interconnected factors, such as service quality, infrastructure, and cultural elements, among others. TX evaluation involves multiple dimensions, including comfort, social interactions, cultural impact, and service quality. A checklist enables these facets to be broken down and analyzed with precision. A checklist may help identifying specific areas for TX improvement, facilitating feedback from service providers. The use of a TX checklist allows evaluators to work autonomously, standardize their analyses, and focus systematically on key aspects.

The methodology used to develop our preliminary TX checklist is based on Stufflebeam's structured approach, which proposes a checklist for creating checklists. This approach highlights the value of the checklist as a robust evaluation tool that clarifies the criteria to be considered when assessing a specific area. Additionally, it ensures that evaluators do not overlook relevant criteria, thereby improving the objectivity, credibility, and reproducibility of the evaluation process [16]. This approach was chosen for its clarity and versatility in the specific construction of checklists, regardless of the field of knowledge, and in this case, it aims to evaluate the TX. The stages of the checklist development process, used as the methodological foundation for this research, are those proposed by Stufflebeam:

1. Focus the task of the checklist: In the initial stage, the purpose and scope of the checklist are established. This involves defining its content, intended uses, and fundamental criteria (clarity, relevance, ease of use).
2. Create a list of candidate checkpoints: A preliminary draft of checkpoints is developed. This step fosters creativity and does not require concerns about the order or categorization of the checkpoints.
3. Classify and organize the checkpoints: Following the initial draft, checkpoints are grouped into logical and functional categories. This step helps identify possible redundancies, omissions, additions, and general improvements to enhance the checklist's organization.

4. Define and develop categories: Each previously established category is defined and explained. This stage also involves reviewing, adding, or removing checkpoints to ensure clarity and comprehensiveness.
5. Determine the order of the categories: A decision is made regarding the importance of category sequencing for the checklist's intended use, and, if necessary, a logical justification for the selected order is provided.
6. Obtain initial reviews of the checklist: A preliminary version of the checklist is shared with potential users to gather feedback and suggestions. Interviews and analyses of their observations contribute to refining the checklist.
7. Revise the content of the checklist: Feedback obtained in previous stages is considered to implement changes that improve the checklist.
8. Outline and format the checklist to serve its intended purposes: It is determined whether scoring, weighting, or graphical elements are needed to visualize results. The final format must be clear and user-friendly, tailored to the needs of end users.
9. Evaluate the checklist: The checklist is reviewed by experts and potential users, and field tests are conducted to ensure it meets key criteria such as relevance, clarity, and fairness, among others.
10. Finalize the checklist: Based on test results and reviews, final refinements are made to ensure its functionality for the intended purposes.
11. Apply and disseminate the checklist: The checklist is implemented in its primary context and, optionally, shared for broader applications.
12. Periodically review and modify the checklist: Information from its applications is collected and used to improve the checklist, ensuring its relevance and efficacy over time.

4 Checklist Development

The development of a checklist for holistically evaluating TX aims to address a gap in the availability of tools designed for this purpose. This section outlines the process undertaken to create a practical and adaptable instrument that enables tourism professionals to analyze strengths, identify areas for improvement, and optimize interactions across all stages of the TX, fostering sustainable and satisfying practices.

The preliminary TX checklist was developed through 5 key stages, based on Stufflebeam's guidelines. These stages, described in detail below, provide a structured framework to enhance the assessment of TX in various phases, driving improvements in service quality and tourist satisfaction.

4.1 Focus the Task of the Checklist

The checklist developed in this study aims to evaluate the TX in a holistic manner, enabling its application to tourism-related products, systems, and services. This approach seeks to provide a versatile and adaptable tool for various contexts, considering the multiple stages of tourist interaction, as suggested by Rusu et al., who emphasize that the entire process should be analyzed (pre-travel, travel, and post-travel) [17].

The primary users of this checklist include tourism destination managers, service operators, and any professional involved in improving CX within the tourism sector. On the other hand, the evaluators will be tourism experts, CX specialists, tourist professionals, academics, and other key stakeholders with knowledge of the tourism industry, ensuring an informed and thorough analysis.

Furthermore, the development of this checklist was based on a systematic review of the literature on the TX, with a specific focus on cultural factors. This review highlighted a lack of comprehensive tools for systematically evaluating tourist experiences across various dimensions. However, this gap was identified as an opportunity to design a practical and evidence-based tool [18].

Thus, this checklist not only addresses a significant void in academic literature but also provides a valuable resource for tourism professionals, enabling them to identify strengths, weaknesses, and areas for improvement in an objective and systematic manner.

4.2 Create a List of Candidate Checkpoints

In this proposal, an initial draft comprising 52 control points was developed, structured into three stages encompassing the pre-travel, travel, and post-travel phases. It is important to note that, according to the methodology employed, the control points at this stage were presented as proposals and without a specific order.

4.3 Classify and Organize the Checkpoints

At this stage, the control points proposed in the previous phase were classified and organized. This process enabled the grouping of control points with shared characteristics, facilitating the structuring of the checklist. By consolidating related points, the aim was to optimize coherence and usability, ensuring that each category represented a logical and meaningful grouping for evaluating the TX.

Additionally, during this phase, control points were added, removed, and modified. The categorization process revealed the need for more specific control points related to food, transportation, accommodation, and attractions. As a result, 55 control points were established: 11 addresses processes prior to interaction with the destination, 36 are associated to processes during interaction with the destination, and 8 to processes following interaction with the destination.

4.4 Define and Develop Categories

The control points identified in previous stages were classified in 18 categories, defined as follows.

Pre-interaction with the Destinations

- Research about the destination: Analyzes the quality and quantity of information available about the destination to support the tourist's decision-making process.
- Accessibility to services and planning: Assesses the ease of access and the tourist's ability to plan their trip effectively.

- Trip preparation: Reviews how the destination provides practical and logistical information to prepare the tourist prior to their arrival.

Direct Interaction with the Destination

- Accessibility: Examines the accessibility within the destination.
- Infrastructure: Assesses the condition and maintenance of facilities and physical spaces at the destination.
- Services: Evaluates the quality of services offered by the destination.
- Cultural and social enrichment: Analyzes opportunities for cultural immersion and interactions with the local community.
- Safety: Verifies the measures and protocols in place to ensure tourist safety.
- Sustainability: Evaluates the destination's commitment to sustainable and responsible practices.
- Language: Examines the destination's ability to effectively communicate with tourists of different linguistic backgrounds.
- Food: Examines the availability and diversity of dining options that meet tourists' needs.
- Transportation: Assesses the ease and efficiency of available transportation options.
- Accommodation: Considers the variety of lodging options tailored to different budgets and preferences.
- Attractions: Analyzes the diversity and appeal of points of interest offered by the destination.

Post-interaction with the Destination

- Follow-up: Evaluates the actions taken by the destination to maintain contact with the tourist after the interaction.
- Feedback and evaluation: Assesses the ease with which tourists can share their opinions about their experience.
- Engagement and loyalty: Evaluates the destination's strategies to foster tourist loyalty and recommendations.
- Reminders: Reviews of actions taken to keep the memory of the trip alive for the tourists.

4.5 Determine the Order of the Categories

At this stage, a preliminary TX checklist was established, designed for the comprehensive evaluation of the TX. This checklist serves as a practical and systematic tool to address the different stages of tourist interaction with the destination, organized into categories encompassing pre-visit, on-site, and post-visit aspects. Table 1 presents the checklist, organized by stages and their corresponding categories.

Table 1. Preliminary Checklist.

Stage	Category	Checkpoints
Pre-Interaction Stage with the Destination	Research	<ul style="list-style-type: none"> – Destination information is appealing, detailed, and up-to-date – Clear options are provided for different budgets and preferences – Promotional materials (websites, social media, brochures) are visually attractive and reliable – Testimonials and reviews from other tourists are available
	Access to Services and Planning	<ul style="list-style-type: none"> – Booking systems (hotels, transportation, activities) are intuitive and multi-channel (web, app, in-person) – Clear and flexible cancellation policies are provided – Communication with tour operators is smooth and multilingual
	Trip Preparation	<ul style="list-style-type: none"> – The destination provides relevant information about required documents (visas, insurance, permits) – Suggestions are offered on clothing, local customs, and behavioral protocols – Tourists receive reminders or confirmations before departure – Facilities are available to resolve questions or issues before the trip (chat, support lines, FAQ)

(continued)

Table 1. (*continued*)

Stage	Category	Checkpoints
Direct Interaction Stage with the Destination	Accessibility	<ul style="list-style-type: none"> – Universal accessibility needs are respected – The destination is accessible or provides alternative accessibility options
	Infrastructure	<ul style="list-style-type: none"> – Nearby public spaces (parks, beaches, plazas) are well-maintained – Infrastructure aligns with what was promised during initial promotion
	Services	<ul style="list-style-type: none"> – The destination delivers on its promises – Tourist information points are available for inquiries
	Cultural and Social Enrichment	<ul style="list-style-type: none"> – Activities that reflect the traditions and cultural values of the community are promoted – Cultural diversity is celebrated and respected in the experiences offered – Clear and accessible information about the destination's history, traditions, and cultural heritage is available – Opportunities for meaningful interaction between tourists and local residents are encouraged – Tourist activities respect and help preserve the tangible and intangible elements of cultural heritage – Immersive experiences are offered, allowing tourists to connect deeply with the local culture

(continued)

Table 1. (*continued*)

Stage	Category	Checkpoints
	Safety	<ul style="list-style-type: none"> – Clear guidelines on emergency procedures are provided – Defined protocols for situations like lost documents or belongings are in place – Security personnel are present at strategic points within the destination – Facilities feature clearly marked evacuation plans
	Sustainability	<ul style="list-style-type: none"> – The destination promotes sustainability practices, such as recycling and resource-conscious use – Renewable energy use is encouraged in tourist facilities – Tourists are incentivized to participate in local conservation activities
	Language	<ul style="list-style-type: none"> – Destination staff have relevant language skills for the tourist demographic – Translation tools or resources are available (guides, apps, bilingual/multilingual signage) – Informative and promotional materials are available in multiple languages
	Food	<ul style="list-style-type: none"> – Food services include a variety of options that reflect the culture and culinary traditions of the destination – Menus are offered that cater to different dietary needs and restrictions – There are fast food areas as well as more formal dining options to suit various tourist preferences – Food preparation and presentation meet quality standards – Restaurants have trained staff to provide professional and attentive service

(continued)

Table 1. (*continued*)

Stage	Category	Checkpoints
	Transportation	<ul style="list-style-type: none"> – The destination has an efficient transportation network that connects the main attractions and points of interest – Public transportation systems are designed to be accessible and easy to use for tourists – Local transportation is clearly marked and reliable – Sustainable transport options are available (bicycles, electric transport)
	Accommodation	<ul style="list-style-type: none"> – Accommodations are located near the main attractions and transportation hubs – Accommodation options range from budget-friendly alternatives to luxurious experiences, catering to various budgets and preferences – Basic services such as Wi-Fi, daily cleaning, and security are guaranteed in all accommodations
	Attractions	<ul style="list-style-type: none"> – The destination includes a balanced combination of natural, cultural, and historical attractions – Activities available at the attractions are tailored to different ages and experience levels
Post-Interaction Stage with the Destination	Follow-Up	<ul style="list-style-type: none"> – Personalized thank you messages are sent to the tourist – A clear channel is provided to address any pending issues (billing, refunds)

(continued)

Table 1. (*continued*)

Stage	Category	Checkpoints
	Feedback and Evaluation	<ul style="list-style-type: none"> – Tourists are provided opportunities to share feedback or rate services – The feedback system is simple and quick to use
	Engagement and Loyalty	<ul style="list-style-type: none"> – Tourists are encouraged to join loyalty or reward programs – Recommendations of the destination are promoted through incentives
	Reminders	<ul style="list-style-type: none"> – Tourists are invited to access personalized photo or video galleries from the trip – The destination sends reminders about future related activities (festivals, events)

5 Conclusions and Future Work

Checklists for TX evaluation are scarce, and lack of holistic approach. We propose a preliminary TX checklist that could help tourism management and consequently improve customer satisfaction in a globalized and competitive environment. This instrument addresses the need for systematic and adaptable tools that consider all stages of tourist interaction, from pre-travel planning to post-visit follow-up. The methodology employed aims to ensure that the included criteria respond to the current demands of the tourism sector, fostering sustainable practices, accessibility, and cultural enrichment. The checklist is adaptable to various contexts and tourism-related products, systems and services. Additionally, it may serve as a basis for future research and the development of complementary TX evaluation tools.

Among the main limitations of this research is the lack of validation, which may compromise its effectiveness. Although it was developed through a literature review and a structured approach, its applicability in real-world contexts has not yet been confirmed. Furthermore, as a proposed checklist, it lacks empirical testing in concrete case studies, limiting the ability to assess its effectiveness and adaptability in practical situations. These limitations highlight the need for future stages of validation and refinement, incorporating both expert feedback and applications in real scenarios to ensure the instrument's utility and relevance.

Future work will focus on the validation and refinement of the proposed checklist. This process will involve its implementation in real-world scenarios, enabling the collection of empirical data on its utility and applicability across various tourism contexts.

Furthermore, it is planned to engage tourism experts and destination managers in evaluating the instrument, to identify opportunities for improvement. As part of the refinement process, adjustments will be made to the design and structure of the checklist based on the feedback received, ensuring its accuracy and ease of use. This process will also include real scenarios, to evaluate the reliability and validity of the instrument, ensuring it meets the necessary standards for practical application.

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